

HOSPICE ORDERS MANAGEMENT TRAINING MANUAL

March 2022

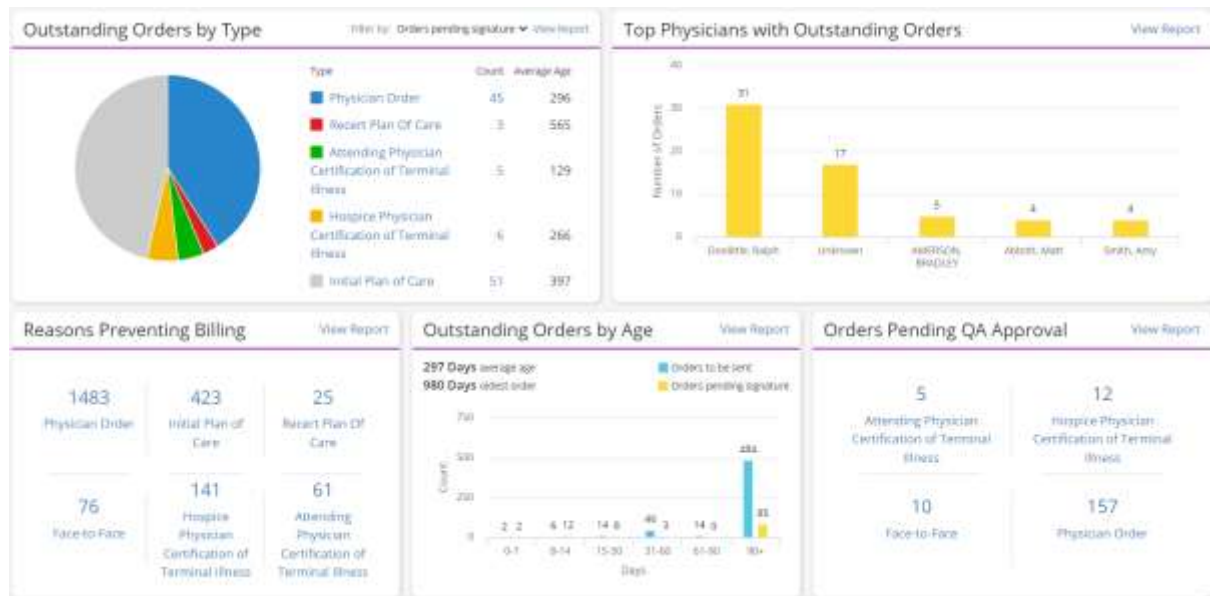
Table of Contents

ORDERS DASHBOARD.....	3
ORDERS MANAGEMENT	4
1. To Be Sent	4
2. Pending Signature.....	5
3. Completed Orders.....	7
PHYSICIAN ELECTRONIC SIGNATURES	7
HELP CENTER.....	9

ORDERS DASHBOARD

Reports/Orders Dashboard

The Orders Dashboard will show an organization's outstanding physician orders, plans of care, certifications of terminal illness, and face-to-face visit documentation that may be holding up billing. This will help assist organizations to quickly identify issues and resolve them.



Orders Dashboard has five tiles:

1. Reasons Preventing Billing - This tile shows outstanding physician orders, plans of care, certifications of terminal illness, and face-to-face visits for patients who have a claim that cannot be billed due to outstanding documents. By selecting the hyperlink title in each area, the user will be able to go to the **Orders Management** page, which shows the patients (and physicians) who have outstanding documents. Select the **View Report** hyperlink to see the Reasons Preventing Billing report.
2. Outstanding Orders by Age - This tile shows aging orders and allows an organization to see orders that are outstanding. This shows a breakdown of orders that have and have not been sent to the physician for signature. The graph is interactive and when an area is selected, it will take the user to a list showing the orders by age. Select the **View Report** hyperlink to see the Outstanding Orders by Age report.
3. Orders Pending QA Approval - This tile shows the orders and documents awaiting approval by Quality Assurance and are unable to be sent out for



- signature. Selecting any of the hyperlinks in this section takes the user to the QA Center to be able to quickly approve the orders, so they are ready to be sent for signature. Select the **View Report** hyperlink to see the Orders Pending QA Approval report.
4. Outstanding Orders by Type - This tile shows the orders and documents that are outstanding by type. It also allows the user to filter by orders that are pending signature and orders that have not yet been sent. The count is a hyperlink that takes the users to an Orders Management list view of only that type of document, so the user can see documents, physicians and age of the outstanding document. Select the **View Report** hyperlink to see the Outstanding Orders by Type report.
 5. Top Physicians with Outstanding Orders - This interactive graph allows the user to see the physicians who have the most outstanding orders/documents. It takes the user to the list view of these documents by the physician. Select the **View Report** hyperlink to see the physicians with Outstanding Orders report.

ORDERS MANAGEMENT

Patients/Orders Management

Use the search bar to find a specific order. Filtering is the same for all tabs. Search by patient name, physician, type, order date, age, branch, team or delivery method.

Search by Patient Name	Search by Physician	🔍	Type to Filter Type...	Order Date	Age: All ▾	Branch: All ▾	Team: All ▾	Delivery Method: All ▾
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Select the patient hyperlink to go straight to the Patient Chart. Print orders individually by selecting the  icon under the Action column. Download orders by selecting the  icon.

Orders are split into three tabs:

1. **To Be Sent** - This section shows orders ready to be sent for signature. Orders are displayed by age, patient, team, physician, delivery method, type, date, date approved and order preview.

To Be Sent Pending Signature Completed Orders

Search by Patient Name Search by Physician Type to Filter Type... Order Date Age: All Branch: All Team: All Delivery Method: All

Mark Selected as Sent

<input type="checkbox"/>	Age of Order	Patient	Team	Physician	Delivery Method	Type	Order Date	Date Approved	Order Preview	Actions
<input type="checkbox"/>	1 days	Ogle, Amanda	Access Academy	Ralph Doolittle	Not Available	Physician Order	02/17/2022	02/17/2022	Update Delivery Method	Mark as Sent
<input type="checkbox"/>	1 days	Agar, Cheeking	Team Stars	OWAIS LODHI	Not Available	Physician Order	02/17/2022	02/17/2022	Update Delivery Method	Mark as Sent
<input type="checkbox"/>	2 days	Avrdank, Arthur	ABC Team	Jose Lopez	Mail	Physician Order	02/16/2022	02/16/2022	Update Delivery Method	Mark as Sent
<input type="checkbox"/>	2 days	Lamont, Erin	Access Academy	Ralph Doolittle	Not Available	Initial Plan of Care	02/16/2022	02/16/2022	Update Delivery Method	Mark as Sent
<input type="checkbox"/>	2 days	RoseTest, Amy/Robert	Access Team	Ralph Doolittle	Not Available	Physician Order	02/16/2022	02/16/2022	Update Delivery Method	Mark as Sent
<input type="checkbox"/>	2 days	RoseTest, Amy/Robert	Access Team	Ralph Doolittle	Not Available	Physician Order	02/16/2022	02/16/2022	Update Delivery Method	Mark as Sent

Select the **Update Delivery Method** hyperlink to change the delivery method. Mark individual orders as sent by selecting the green **Mark as Sent** hyperlink or select checkboxes to the left of orders. Then select the **Mark Selected as Sent** button at the top right. The number of orders selected will show on the right side of the button. To select all orders, select the top-left checkbox in the purple header.

Branch: All Team: All

2 Mark Selected as Sent 2

<input type="checkbox"/>	Age of Order	Patient	Team	Physician	Type	Order Date	Date Approved	Order Preview	Actions
<input checked="" type="checkbox"/>	6 days	Smith, John	Axessians	OWAIS LODHI	Initial Plan of Care	10/16/2020		Mark as Sent	
<input checked="" type="checkbox"/>	9 days	Witt, Isaac	Charles Team	Glenn Johnson	Physician Order	10/13/2020	10/13/2020	Mark as Sent	
<input checked="" type="checkbox"/>	15 days	Witt, Isaac	Charles Team	Glenn Johnson	Physician Order	10/07/2020	10/13/2020	Mark as Sent	

- Pending Signature** - This section shows orders that have been sent for signature and are expected back. Orders are displayed by age, patient, team, physician, delivery method, type, date, sent date and order preview.

To Be Sent **Pending Signature** Completed Orders

Search by Patient Name: Search by Physician: Type to Filter Type: Order Date: Age: All Branch: All Team: All Delivery Method: All

Mark Selected as Received Update Status

<input type="checkbox"/>	Age of Order	Patient	Team	Physician	Delivery Method	Type	Order Date	Sent Date	Order Preview	Actions
<input type="checkbox"/>	1 days	bzk, jim bob	Access Team	Jose Lopez	IDG	Physician Order	02/17/2022	02/17/2022		Mark as Received Update Status
<input type="checkbox"/>	1 days	Adams, Wednesday	Team WMA 2	Jose Lopez	IDG	Physician Order	02/17/2022	02/17/2022		Mark as Received Update Status
<input type="checkbox"/>	1 days	Aandark, Arthur	ABC Team	CHARLES WREN	IDG	Physician Order	02/17/2022	02/17/2022		Mark as Received Update Status
<input type="checkbox"/>	2 days	Riggins, Sara	Access Academy	Ralph Doolittle	Mail	Physician Order	02/16/2022	02/17/2022		Mark as Received Update Status
<input type="checkbox"/>	2 days	Riggins, Sara	Access Academy	Ralph Doolittle	Mail	Initial Plan of Care	02/16/2022	02/17/2022		Mark as Received Update Status

Mark individual orders as received by selecting the green **Mark as Received** hyperlink under the Actions column. The received date populates with the current date. Enter the signed date, then select the **Mark** button.

21 days Hospice, Jake Matt's Testing Team Matt Abbott Physician Order 10/01/2020 10/20/2020 **Marking in Progress**

Received Date: 10/22/2020 Signed Date: MM/DD/YYYY

To change the status of individual orders select the green **Update Status** hyperlink under the Actions column. Change the status in the drop-down menu and select the **Update** button.

2 days Mahajan, Bhushan Access Academy Ralph Doolittle Mail Initial Plan of Care 02/16/2022 Status: To Be Sent

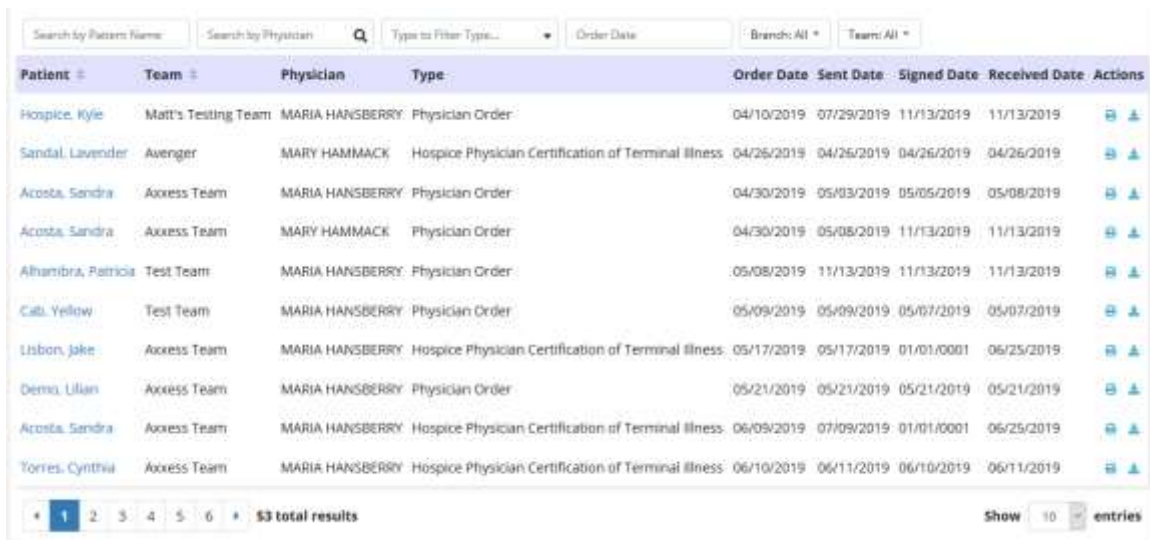
To mark multiple orders, select checkboxes to the left of orders, then select the **Mark Selected as Received** button at the top right. The number of orders selected will show on the right side of the button. Select the top-left checkbox in the purple header to select all orders.























Age of Order	Patient	Team	Physician	Delivery Method	Type	Order Date	Sent Date	Order Preview	Actions
1 days	hills, jim bob	Access Team	Jose Lopez	IDG	Physician Order	02/17/2022	02/17/2022		<input checked="" type="checkbox"/> Mark as Received Update Status
1 days	Adams, Wednesday	Team WMA 2	Jose Lopez	IDG	Physician Order	02/17/2022	02/17/2022		<input checked="" type="checkbox"/> Mark as Received Update Status

To update the status of multiple orders, select the checkboxes to the left of orders, then select the **Update Status** button at the top-right. The number of orders selected will show on the right side of the button. Select the top left checkbox in the purple header to select all orders.

3. **Completed Orders** - This section shows orders that are signed and received. Orders are displayed by patient, team, physician, type, date, sent date, signed and received date.



Patient	Team	Physician	Type	Order Date	Sent Date	Signed Date	Received Date	Actions
Hospice, Kyle	Matt's Testing Team	MARIA HANSBERRY	Physician Order	04/10/2019	07/29/2019	11/13/2019	11/13/2019	 
Sandal, Lavender	Avenger	MARY HAMMACK	Hospice Physician Certification of Terminal Illness	04/26/2019	04/26/2019	04/26/2019	04/26/2019	 
Acosta, Sandra	Access Team	MARIA HANSBERRY	Physician Order	04/30/2019	05/03/2019	05/05/2019	05/08/2019	 
Acosta, Sandra	Access Team	MARY HAMMACK	Physician Order	04/30/2019	05/08/2019	11/13/2019	11/13/2019	 
Alhambra, Patricia	Test Team	MARIA HANSBERRY	Physician Order	05/08/2019	11/13/2019	11/13/2019	11/13/2019	 
Carl, Yellow	Test Team	MARIA HANSBERRY	Physician Order	05/09/2019	05/09/2019	05/07/2019	05/07/2019	 
Lisbon, Jake	Access Team	MARIA HANSBERRY	Hospice Physician Certification of Terminal Illness	05/17/2019	05/17/2019	01/01/0001	06/25/2019	 
Demo, Lillian	Access Team	MARIA HANSBERRY	Physician Order	05/21/2019	05/21/2019	05/21/2019	05/21/2019	 
Acosta, Sandra	Access Team	MARIA HANSBERRY	Hospice Physician Certification of Terminal Illness	06/09/2019	07/09/2019	01/01/0001	06/25/2019	 
Torres, Cynthia	Access Team	MARIA HANSBERRY	Hospice Physician Certification of Terminal Illness	06/10/2019	06/11/2019	06/10/2019	06/11/2019	 

PHYSICIAN ELECTRONIC SIGNATURES

Physicians and non-physician practitioners can electronically sign orders in Axxess Hospice if they are set up with permissions and a user profile.

To sign orders, navigate to the **Pending Signature** tab. Orders that are ready to be signed will have a **Sign** hyperlink under the Actions column. Select **Sign** to sign an order.

To Be Sent **Pending Signature** Completed Orders

Search by Patient Name Search by Physician Type or Filter Type Order Date Age All Branch All Team All **Bulk Sign** **Sign Selected by Patient**

Age of Order	Patient	Team	Physician	Type	Order Date	Send Date	Order Preview	Actions
8 days	Michael Jones	Respiratory Team	Mark Abbott	Physician Order	10/01/2020	10/01/2020		Sign

To sign multiple orders at once, select the blue **Bulk Sign** button. Select the orders to be signed and select the **Sign Selected** button to sign the selected orders.

To Be Sent **Pending Signature** Completed Orders

Search by Patient Name Mark Abbott Type or Filter Type Order Date Age All Branch All Team All **Sign Selected** **Cancel**

Age of Order	Patient	Team	Physician	Type	Order Date	Send Date	Order Preview	Actions
8 days	Michael Jones	Respiratory Team	Mark Abbott	Physician Order	10/01/2020	10/01/2020		Sign Selected

Once signed, orders will appear on the **Completed Orders** tab.

NOTE: Practitioners will only be able to sign orders that are assigned to them.

HELP CENTER

A great resource that is available 24/7 is our Help Center. It is a place to get answers to frequently asked questions or watch videos on all our Axxess products. Our Help Center can be accessed by selecting *Help/Help Center* or <https://www.axxess.com/help/>.

