

HOME HEALTH CLINICIAN TRAINING QUICK REFERENCE GUIDE

September 2022

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LOGGING IN

1. Go to www.axxess.com and select **LOGIN**.
2. Enter the email address and password.
3. Select **Secure Login**. **NOTE:** If password is forgotten, select **Having trouble logging in?** and go through the prompts.
4. Select **OK**.

AXXESS PLANNER

There are six windows in the Axxess Planner:

1. Date/Time/Weather - Today's date, time and five-day weather forecast for the user's specific area.
2. Today's Visits Schedule - Select the  **Date** icon for a calendar view. The red dots are visit dates. Select a day on the calendar to bring up the tasks schedule.
 - a. Select task to show the status of visits.
 - b. Start the visit from here by selecting the **START** icon.
 - c. Select the **Patient Chart: 'Patient's Name'** hyperlink to be taken directly to their chart.
3. Today's Visits Map

Green – Current Location **Red** – Visit Location **Blue** – Selected Visit (marker)

- a. Select a marker.
 - b. Select the **Get Directions** hyperlink.
4. Unread Messages - Selecting a message takes users directly to the Messaging Center.
 5. Past-Due Visits - Select the **OPEN** tab to be taken to the note.
 6. Alerts - Select the **OPEN** tab to be taken to the note.
 - a. Hover over the red sticky note.
 - b. Select **View Comments**. If necessary, write in a response and select **Add Comment**.

NOTE: For enrolled organizations, there is also a link on the top left side for **Axxess Training and Certification** for users to broaden their Axxess knowledge base.

DASHBOARD

There are tiles shown on the dashboard. **NOTE:** Different tiles may be shown based on permissions.

1. Date/Time

2. Welcome Panel
3. Recertifications Due
 - a. Select **Past Due** to open Past Due Recerts window.
 - b. Select **Upcoming** to open the Upcoming Recerts window.
4. Unread Messages
 - a. Select the **View All Messages** hyperlink to open the My Messages window.
 - b. Select the **Delete** hyperlink to remove messages.
 - c. Select the **Compose Message** hyperlink to start a new message.
5. News & Updates
 - a. Select hyperlinks to view full articles.
6. My Schedule Tasks
 - a. Select **View All Tasks**.
 - b. Decide on how to view the data, select **Group by Patient, Group by Date** or **Group by Task**.
 - c. Select the **Missed Visit Form**.
 - i. Select Order Generated or Physician Office Notified.
 - ii. Choose Reason and enter any Comments.
 - iii. Enter Staff Signature and Date (autogenerates to today's date).
 - iv. Select **Submit**.
7. Patient Birthdays
 - a. Select the **View all Birthdays** hyperlink to open the Patient Birthday Listing report.
8. Outstanding Claims
 - a. Select the Patient Name hyperlink to open the Patient Charts window.
 - b. Select **Billing Center** hyperlink to open the Billing Center.

EDIT PROFILE

Home/My Account/Edit Profile

1. Update password, electronic signature, address, phone numbers or software language (English or Español).
2. Select **Save**.

NOTE: If signature is forgotten, it must be reset.

RESET SIGNATURE

Home/My Account/Reset Signature

Select **Reset Signature**. A link will be sent to the email address listed in the message allowing user to create a new signature.


MY MONTHLY CALENDAR

Home/My Monthly Calendar

1. Select task to complete note/visit.
2. If necessary, select **Missed Visit Form** and complete.

PATIENT CHARTS

Patient/Patient Charts

1. Choose branch, status, payer and/or type any part of the patient's name.
2. Select patient.
 - a. Choose discipline (Show) and range (Date).
 - b. Select the  icon to expand the task view.
 - c. Select visit or note hyperlink.
 - d. Select Menu/Details (under Actions) to make updates to dates, times, etc.

QUICK LINKS

Allergy Profile

1. Select **Add Allergy**.
2. List the name and type.
3. Select **Save & Add Another** for additional allergies or **Save & Exit**.

Select **Edit** or **Delete** to make changes.

Medication Profile

1. Select **Add Medication**.
 - a. Enter the start date and (optional) DC through date.
 - b. Start typing in the medication, then select **Search for Medication**.
Select medication from the drop-down box. **NOTE:** Medications not

listed can be added. However, only medications selected from the dropdown will be checked for drug interactions.

- c. Enter amount.
 - d. Start typing the name of the physician and select from drop-down box.
 - e. Suggested classifications will be listed if medicine from the database is chosen.
 - f. Enter frequency (shorthand accepted), route and choose type.
 - g. Check box to create an order for new medication (if needed.)
 - h. Select **Save & Add Another** for additional medications or **Save & Exit**.
2. Select **Drug Interactions**.
 - a. Check medication boxes.
 - b. Select **Check Interactions**.
 - c. The Drug-Drug Interactions PDF will generate.
 3. Select **Sign Medication Profile**.
 - a. Enter the signature and date.
 - b. Select **Sign**.

Select **Edit**, **Delete** or **Discontinue** to make changes. Select **Signed Medication Profiles** to view who signed the profile and when.

Immunization Profile

1. Select **Add Immunization**.
2. Choose the type of immunization, whom it was administered by and date administered.
3. Select **Save** or **Save & Add Another** to continue with additional immunizations.
 - a. Select **Delete** or **Inactivate** from active list.
 - b. Select **Decline/Contraindicate Immunization**. Choose type of immunization and select date documented. Check declined or contraindication. **Save** or **Save & Add Another** to continue with additional declined immunization.

Select **Activate** to reactivate Inactive Immunizations.

Infectious Disease Profile

1. Select **COVID-19 Screening** to add a new screening.
2. Choose the person screened from the drop-down menu.
3. Select the checkbox if the user refused screening.
4. Enter the reported temperature.

5. Answer the yes or no questions and choose a risk level.
6. Templates and additional screening requirements may be entered.
7. Select the screening acknowledgment checkbox.
8. Enter the clinician signature and confirm the signature date and time (both auto-generate to the time the window was opened).
9. Select **Sign Screening** to finish or select **Sign & Add Another** to continue with another blank form.
10. Select **View** to show previously entered.
11. Select **Delete** to remove.

Preadmission Notes


1. Select **Add New Note** to create a note.
2. Enter title and comments.
3. Select **Save**.
4. Select **View** to show previously entered.
5. Select **Delete** to remove.

Communication Notes

Choose episode. Start typing either user, date or status to narrow down. Select **Edit** or **Delete** to update.

1. Select **New Communication Note**.
2. Choose episode associated.
3. Confirm date (auto-generates to today's date).
4. Enter physician if necessary.
5. Enter communication text or choose template.
6. Choose to send note as message.
7. Enter staff signature, date and time.
8. Select either **Save** or **Complete**.

Orders And Care Plans

1. Choose date range then select **Generate**.
2. Select  to view PDF version.
 - a. Select **Print** to print.
3. Select **Delete** to remove.

Plan of Care Summary

1. Select **Current** to view all current orders by episode.


2. Select **Discontinued** to view all current orders by episode with a status of discontinued.
3. Select different episodes from the drop-down menu.
4. Select the **Print** button to print.

Vital Sign Charts

1. Select **Vital Sign Charts** or **Vital Signs Log**.
2. Select **Excel Export** to export Vital Signs Log.


PERMISSIONS-BASED QUICK LINKS

Authorizations Listing

Start typing either authorization number, payer, type, start date or end date, authorized units, used, unused or unit to narrow down. Select **Edit** to update or **Delete** to remove. Select the  icon to print. Select the **Export to Excel** button to export the list of authorizations. To add an authorization:

1. Select **Add Authorization**.
2. Choose the authorization type, status and insurance (auto-generated).
3. Enter authorization number.
4. Select the start date and end date. **NOTE:** The start date cannot be changed once the authorization is created.
5. Select discipline, HCPC code, enter authorized units and choose unit type. **NOTE:** Hourly is for recording authorization only, the system currently doesn't provide tracking hours.
6. Select **Add More Disciplines** (if necessary).
7. Enter comments.
8. Add attachments by selecting **Browse** then **Attach Document**.
9. Select **Save**.

Episode Summaries

1. Choose episode
2. Start typing to search.
3. Select  to view the PDF version or **Delete** to remove.
4. Create auto summary by selecting **Create Episode Summary**.

Triage Classification

- This is the PDF version of a patient's Emergency Preparedness Plan/Triage Classification.
- Select **Print** to print.

PATIENT CHART TABS

New/Order

1. Select **New Order**.
2. Confirm episode associated, date, time, effective date, attending physician and who to send to.
3. Options include do not send, no physician signature required, copy to and order is for next episode.
4. Enter Summary/Title.
5. Select Order Type.
 - a. Medication Orders - Add new medication(s), update or discontinue medication(s).
 - b. Plan of Care Orders - Update the Plan of Care.
 - c. Wound Care Orders – Opens the Wound Orders Profile window. Users should then select the **Add New Wound Order** button.
 - d. Discipline Frequency - Add, update or discontinue frequency of visits by discipline.
 - e. Supply Manager - Add supplies.
 - f. Other - Anything not previously mentioned. **NOTE:** Anything entered in this type will *not* flow to the POC Summary.
 - g. Confirm that order is read back and verified.
6. Enter clinician signature and time. Confirm signature date.
7. Select either **Save** to keep progress or **Create Order** to finish.

New/Aide Care Plan

1. Choose the Aide Care Plan.
2. Choose the Things to Report.
3. Enter any Special Considerations.
4. Choose and/or enter the Plan Details from the Vital Signs, Elimination, Nutrition, Activity, Household Tasks and Other categories.
5. Choose the Notifications.
6. Enter the clinician signature, signature date and signature time.
7. Select **CREATE & COMPLETE**.

New/Communication Note

1. Choose the episode associated.
2. Confirm the date.
3. Optional to enter the physician.
4. Enter the communication text or choose template.
5. Enter the staff's signature, date and time.
6. Select either **Save** to keep progress or **Complete** to finish.

PDGM Dashboard - Continuous access to real-time episode data to evaluate key aspects of care delivery for streamlined intra-episode management. View nine tiles or select the **Plan of Care Summary**, **Plan of Care** and/or **View Documents** buttons for direct links to their respective sections.

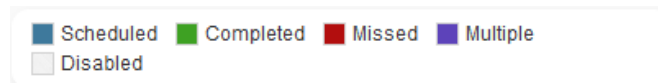
Documents

1. Select **New Document**.
2. Select **Browse**.
3. Add files saved on the computer.
4. Enter the document name.
5. Choose the document type.
6. Select **Submit**.

For previously uploaded documents, select **Edit** to update or **Delete** to remove.

SCHEDULE ACTIVITY

1. In Patient Charts, select **Schedule Activity** or Schedule/Schedule Center.
2. Current episode is the default.
3. Color-coded visits appear on the calendar and are the print color of the task.



SCHEDULING VISIT(S) (PERMISSIONS-BASED)

1. Select the date on the calendar.
2. The tab below will expand. **NOTE:** Section will also expand by selecting the **Show Scheduler** tab.
3. Select the discipline tab.
4. Choose the task and user.

5. Select **Save**.

To schedule multiple visits at the same type for the same user:
Schedule Manager/Schedule Employee.

1. Choose the user/employee and visit type.
2. Select the day(s) on the calendar.
3. Select **Save & Exit** or **Save & Add Another** for additional visits.

DELETING A VISIT (PERMISSIONS-BASED)

Patient Charts/Menu/Delete

1. Select **OK**.

To retrieve deleted visit: *Patient Charts/Quick Links/Deleted Tasks*

1. Start typing the task/document, scheduled date, status or user to narrow down.
2. Select **Restore**.

OASIS-D1 START OF CARE

Go to Patient Chart or Schedule Center and select OASIS-D1 Start of Care.

NOTE: If completed previously, load first SOC Assessment by choosing from dropdown and selecting **Load Assessment**.

1. Answer assessment questions. **NOTE:** Some information is previously entered from referral/admission.

Green Boxes - OASIS M questions.

Purple Boxes - Generate POC pathways.

Grey Boxes - Pull to POC.

Blue Boxes - Physical Assessment.

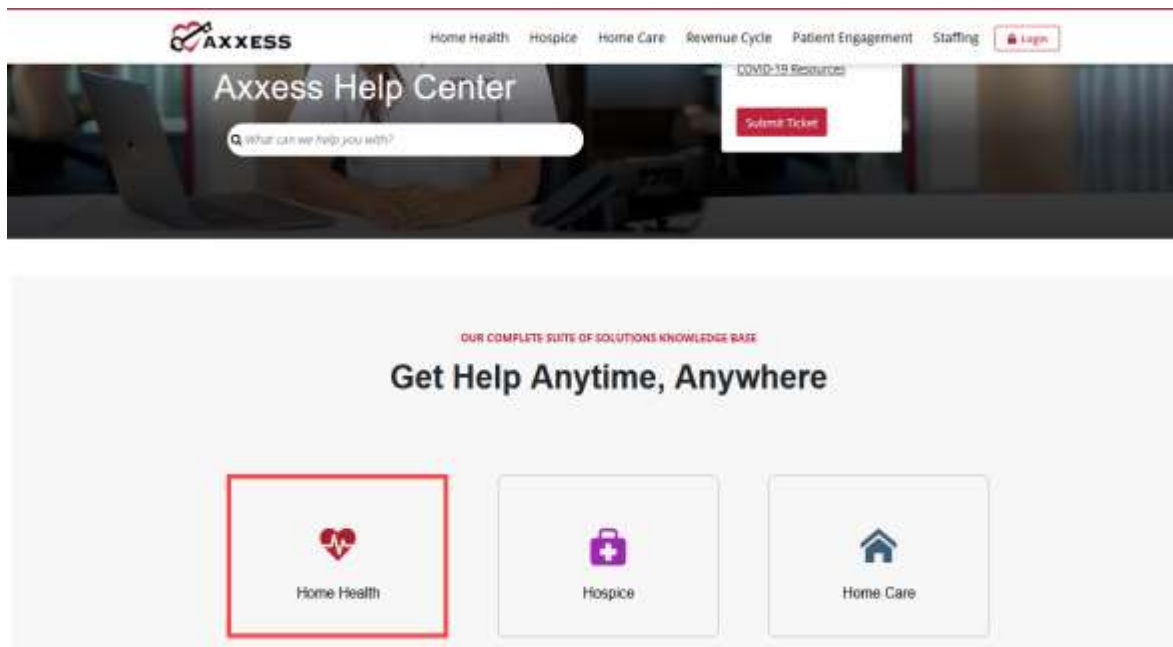
2. It is optional to enter orders at the bottom of each tab based on assessment answers. Replace asterisks ** with patient specific information.
3. When the assessment is completed, select **Check For Errors**.
 - a. Warnings will display a ⚠️.
 - b. Errors have a ❌. Users cannot finish OASIS with error messages.
 - c. Confirm the Home Health Resource Group and OASIS Case-Mix Analysis.

4. Select **Create Medicare Plan of Care** to create a 485/POC generated from assessment. **NOTE:** There is an optional **OASIS Scrubber** that will look for any inconsistencies or flags that the organization may want to address.
5. Enter time in and time out, signature and date.
6. Select **Finish**.

NOTE: If the organization keeps track of travel time, surcharges and mileage must also be entered.

HELP CENTER

A great resource available any time, any day is our Help Center. Get answers to frequently asked questions and watch tutorial videos on all our Axxess products. Our Help Center can be accessed by going to *Help/Help Center* or <https://www.axxess.com/help/>



The screenshot shows the Axxess Help Center website. At the top, there is a navigation bar with the Axxess logo and links for Home Health, Hospice, Home Care, Revenue Cycle, Patient Engagement, Staffing, and a Login button. Below the navigation bar is a large banner with the text "Axxess Help Center" and a search bar that says "What can we help you with?". To the right of the search bar is a "Submit Ticket" button. Below the banner is a section titled "OUR COMPLETE SUITE OF SOLUTIONS KNOWLEDGE BASE" with the heading "Get Help Anytime, Anywhere". Underneath this heading are three icons representing different services: Home Health (a heart with a pulse line), Hospice (a purple cross), and Home Care (a house icon). The Home Health icon is highlighted with a red border.