

# **HOME HEALTH ORDERS MANAGEMENT OVERVIEW QUICK REFERENCE GUIDE**

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## OVERVIEW SUMMARY

### *View/Orders Management*

The Orders Management Center is where users can access sub-menus that include:

1. Orders Pending Co-Signature - Orders that need a co-signature because the user who signed the order requires a co-signature (permission-based).
2. Orders to Be Sent - Orders that are ready to be sent to the physician for signature. This is where orders can be printed, mark orders as sent to physician and send orders electronically.
3. Orders Pending MD Signature – Orders that have been sent to the physician but not yet received back from the physician signed. Once orders are received by the physician, navigate to this section to mark the orders as received.
4. Orders History – Orders in every status are housed. To view the status of an order, update the signature or received date, or print an order.

## ORDERS PENDING CO-SIGNATURE

### *View/Orders Management/Orders Pending Co-Signature*

1. Choose filters.
2. Select **Generate**.
3. Select Order under the Type column.
4. Select **Co-Sign**.
5. Enter the Signature and Date (auto-generates today's date).
6. Select either **Co-Sign** or **Co-Sign and Approve** (permission based).
7. If co-sign only, order goes to the Quality Assurance (QA) Center.

## ORDERS TO BE SENT

### *View/Orders Management/Orders to be Sent*

Once orders are approved, the Orders to Be Sent screen will populate the orders ready to be sent to the physician.

### Send Orders Electronically

**NOTE:** This feature is only available for organizations that use the WorldView integration in *Admin/Company Setup/Integrations*.

1. Choose Branch, choose Delivery Method of Axxess Portal, specify Date Range and Status if applicable.
2. Select **Generate**.
3. Select/multi-select the checkboxes next to the order.
4. Select **Send**.
5. Confirmation appears in the top right corner that orders were sent successfully.
6. Orders move to the Orders Pending Signature submenu. Updates to Sent to Physician (Electronically) status in patient chart.

### Send Orders Manually

1. Choose Branch, Choose Delivery Method of Mail or Fax, specify date range and status if applicable.
2. Select **Generate**.
3. Select  to print orders.
4. Select/multi-select the checkboxes next to the order.
5. Select **Send**.
6. Confirmation appears in top right corner that orders were sent successfully.
7. Orders move to the Orders Pending Signature submenu. Updates to a Sent to Physician (manually) status in the patient chart.

## ORDERS PENDING MD SIGNATURE

*View/Orders Management/Orders Pending MD Signature*

Orders Pending MD Signature is for tracking outstanding orders previously sent to the physician or to mark an order as received and/or signed.

### Mark an Order as Received

1. Choose the Branch, enter the Date Range (auto-generates previous 60 days) and patient status.
2. Select **Generate**.
3. Start typing to search for the specific order.
  - a. **Optional:** If the order is manual (fax or mail), scan the order in and upload to the patient chart: *Patients/Patient Charts/Documents*.

### For Multiple Orders

1. Check the box(es) next to the order(s).
2. Select the **Receive Order** button.
3. Confirm the Received Date and Physician Signature Date (auto-generates today's date).
4. Select **Mark as Received**.
5. Confirmation appears in the top right corner that orders were marked as received.

### For Single Order

1. Select the **Receive Order** hyperlink.
2. Enter the Received Date (auto-generates today's date) and MD Sign Date.
3. Select **Update**.
4. Confirmation appears in the top right corner that orders were marked as received.

## ORDERS HISTORY

*View/Orders Management/Orders History*

All orders in every status. Useful to find the status of the order, update received/signed dates, reprint orders, and see orders with returned physician signature.

1. Choose the Branch, Date Range (defaults past 60 days) and/or patient Status.
2. Select **Generate**.
3. Select the **Edit** hyperlink.
4. Update Sent, Received and/or Physician Signature Date.
5. Select **Update**.
6. Optional: Print or Export to Excel.

## NOTES

To view or enter order notes:

1. Select the note  icon
2. Type in the text box
3. Select **Add Note**. The note icon will turn blue.
4. Optional: Select  to edit or select  to delete.

## PHYSICIAN ORDER HISTORY

*Reports/Report Center/Clinical Reports/Physician Order History*

For only electronic orders that have been sent:

1. Choose Branch, change the Status to “Sent to Physician (Electronically)” and choose the Date Range.
2. Select **Generate Report**.
3. The orders displayed will be those that are in a Sent to Physician (electronically) status.

## 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/>

