

# HOME CARE MOBILE IOS TRAINING MANUAL

November 2022





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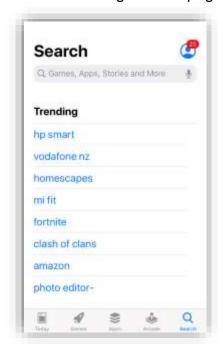


# **DOWNLOADING APP**

Go to the Apple App Store.



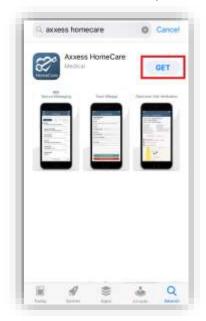
Select the search feature at the bottom right of the page.





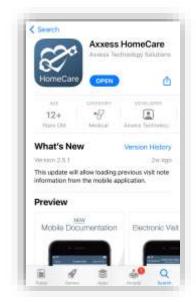


Search for Axxess HomeCare. The app is blue and says HomeCare at the bottom of the Axxess logo (heart and key). Select the **GET** button. Then there will be a pop up from the bottom of the screen (if logged into an Apple account) with an **Install** button. Once selected, the download process will begin.



NOTE: If the app is accidentally removed, go back to the App Store, search for HomeCare and select on the Axxess HomeCare app. To re-download the app, select the cloud icon.

Once downloaded, select the **OPEN** button.







The app will now be located with the rest of the user's apps.

NOTE: Always make sure to update the app for the latest version in the App Store for free.



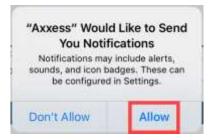
Select the Home Care app to open. Select **Allow While Using App** so that Axxess can access the location while using the app. Allowing this feature is critical for the app to pinpoint the location accurately for Electronic Visit Verification (EVV), which will be covered later.



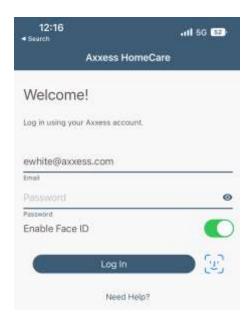
Select **Allow** so that Axxess can send notifications to the user.







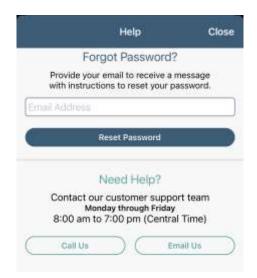
The following is the login screen. Enter the email provided to the organization and the password that was established while logging into the web version of Axxess Home Care. Enter the email address and password, then select **Log In**. Users can also choose to enable Face ID for easier log in.



If the password was forgotten, select the **Need Help?** hyperlink. Enter the email address associated with the account and select the **Reset Password** button to send the password reset instructions to the email. The version number of the app will be listed at the bottom. Links to call or email Axxess for further assistance will also be available on this screen.







The user will then be required to create a four-digit PIN code.



Once a four-digit PIN has been entered, confirm the PIN by entering it one more time. Any time the user leaves the app or the app times out due to inactivity, the PIN must be reentered.

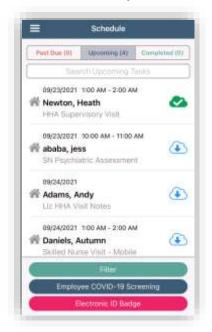
NOTE: After five incorrect attempts, the user will be prompted to log back into the app and re-create the PIN.





#### MY SCHEDULE

The following is the **Schedule**. The Schedule is split up between three tabs at the top of the page: **Past Due**, **Upcoming** and **Completed**. The number in parentheses next to the tab title is how many tasks or visits are in each.



Visits will be listed one by one. It will show the visit date and the planned visit time to the right. Below is the client's name in bold. Below is the type of visit and to the left of their name is the EVV status. There are the three different EVV statuses:



To narrow down the list of items, use the search bar below the schedule tabs. Select inside the search and start typing the name of the client.



Another way to narrow down the list of clients is with the **Filter** button at the bottom of the page. Search by client name, date range, EVV status or sort the

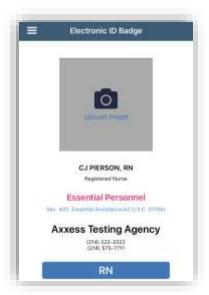




schedule by client name, EVV status or date range. Once a filter has been chosen, select the **Apply Filters** button on the bottom right. For filters to go back to their original defaults, select the **Reset Filters** button in the bottom left.



Select the **Electronic ID Badge** button for a quick view that users can show when seeing clients. Select **Upload Image** to take a photo or choose from the photo library for a picture of the user.

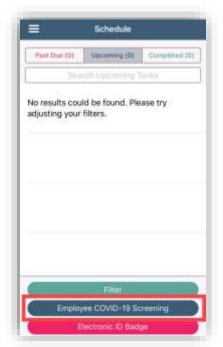






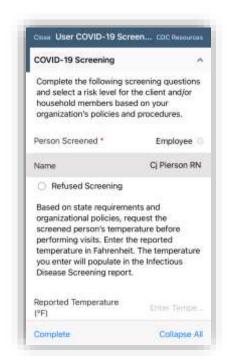
#### **SCREENINGS**

All mobile app users can complete a COVID-19 screening from a mobile device. From the Schedule screen, select the **Employee COVID-19 Screening** button or select the menu button in the top left and select **Employee COVID-19 Screening**.

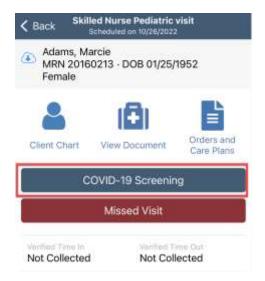


Enter a temperature. Answer the screening questions and assign a risk level based on the organization's policy. There is a space for templates or free text. Select the screening acknowledgement and enter the date and time. Select **Complete** to save the screening. Once completed, the screening information flows to the employee's infectious disease profile.





Select a client visit and select the **COVID-19 Screening** button at the bottom of the screen to complete a client COVID-19 screening.



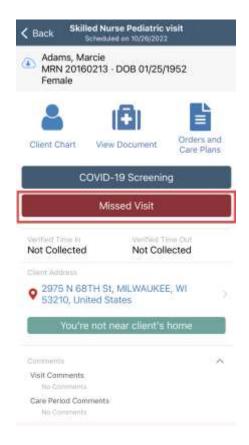
Choose the person screened including their name and relationship. Enter a temperature. Answer the screening questions and assign a risk level based on the organization's policy. There is a space for templates or free text. Select the screening acknowledgement and enter the date and time. Select **Complete** to save the screening. Once completed, the screening information flows to the client's Infectious Disease Profile.





### **MISSED VISITS**

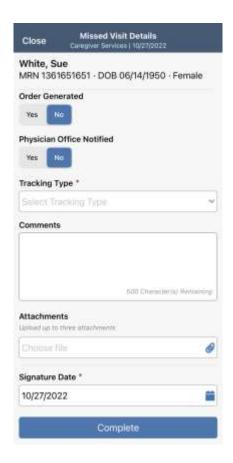
To document a missed visit, select the **Missed Visit** box after selecting the visit that should be marked as missed.



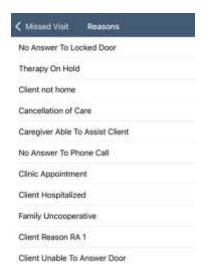
The **Missed Visit Details** page will open to document the missed visit. Required information is indicated with a red asterisk \*. Toggle yes or no to document if an order was generated for the missed visit and if the client's physician office was notified. The two drop down options for **Tracking Type** are employee or client.







The **Reasons** drop-down will generate after this selection and a reason must be chosen. Some reasons are defaulted for selection by Axxess, and other visible options are unique to the organization and was entered as per the company setup.







**Comments** can then be entered in the free text box. Up to three attachments can be attached to the Missed Visit. **Signature Date** will default to current date but can be changed by clicking into the date listed.

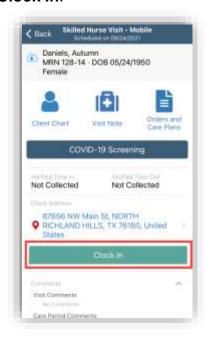
Select **Complete** to finish documentation. The clinician signature will then be obtained and saved. The missed visit can now be found in the **Completed** section of visits and will be marked as missed.



#### **ELECTRONIC VISIT VERIFICATION**

To start the task verification process, select the visit from the schedule. It will show the client name, MRN, DOB, task type and date. There are links to the **Client Chart**, **View Documentation**, and **Orders and Care Plans**. Patient or caregiver COVID screenings can be conducted by selecting the **COVID-19** 

**Screening** button. The client address to the right of red push pin  $\mathbf{v}$  icon is a hyperlink. Selecting the address will prompt the device to open the map app of the user's choice. Select **Clock In**.







When a user attempts to clock into a visit that is scheduled at least one day but fewer than six days in the past, the app will provide a warning message informing the user that the visit is scheduled in the past.

When a user attempts to clock into a scheduled visit over five days in the past, the app will provide an error message informing the user that the visit is over five days old. Users can select **OK** to exit the warning message without clocking into the visit. Users cannot clock in to visits that are older than five days. If a user needs to complete a task that is older than five days, the task must be rescheduled.

If the user is not located within a reasonable distance to the client's home, the following error will display:

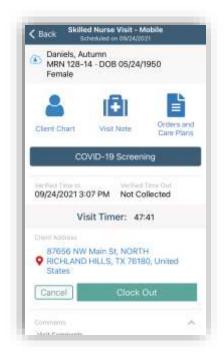


If the user is in range of the client's home, the app will begin retrieving the location. Once retrieved, the client's name is listed at the top of the page followed by the type of visit. Select the time in and out calendars and clocks to update. Enter any optional associated mileage or surcharge.

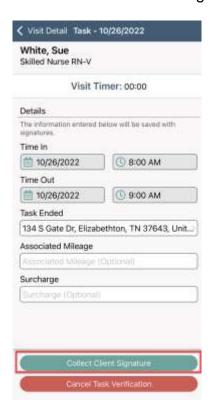
Once the caregiver clocks in, the visit timer becomes visible from the **Task Details** screen and **Visit Note** screen if applicable. Visit comments and care period comments are also visible along with direct links to the **Client Chart**, **View Document**, and **Orders and Care Plans**.







When the visit is finished, select the **Clock Out** button. Then select **Collect Client Signature**. To back out of this option, select **Cancel Task Verification**. There will also be an option to enter associated mileage and surcharges.





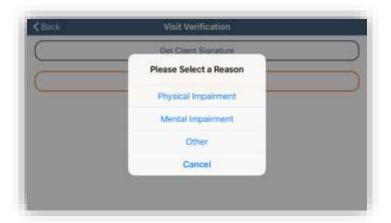


NOTE: This setting is chosen in Company Setup. Users may or may not have access to change the time in or out depending on setting choice.

#### **Unable To Sign**

If the client is not able to sign the verification, select **Select Unable to Sign Reason**. Choose from the following options:

- Physical Impairment
- Mental Impairment
- Other



If **Other** is selected, the following page will display. Enter the reason in the free text space. The signee will also check the boxes that confirm the employee was there and performed a visit as well as confirming the beginning and ending dates and times.



If the caretaker of facility staff will be the one signing on behalf of the client, select **Collect Staff Signature**. Then sign and select **Submit** in the top right.







## **Client Signature**

Select Get Client Signature.



Use a finger or stylus to enter the client signature. The signee will also check the boxes that confirm the employee was there and performed a visit as well as confirming the beginning and ending dates and times. Select **Submit** in the top right.

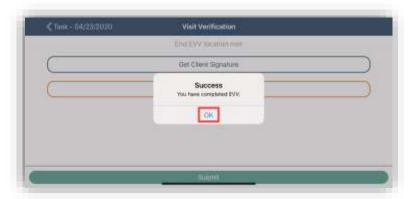
The following screen will display. The signee will also check the boxes that confirm the employee was there and performed a visit as well as confirming the beginning and ending dates and times. Select **Clear Signature** to try again or select **Submit** in the top right corner to continue.



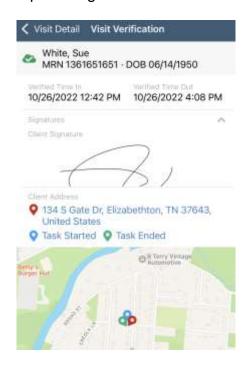




A confirmation will display that the EVV process is complete. Select  $\mathbf{OK}$  to continue.

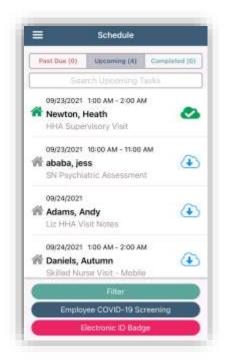


The **Visit Verification** page will display the verified time in and out, the signature, the task started location con and the task ended location con. Select **Visit Detail** in the top left to get back to the schedule.



The EVV status icon next to the client's name will be updated to green.





# **Patient Voice Recording**

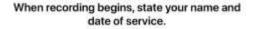
Users can collect a patient voice recording after selecting **Patient Unable to Sign**. When a patient is unable to provide a signature to verify services, select **Patient Unable to Sign** and select the reason why a patient's signature cannot be obtained. After specifying a reason, select Collect Patient Voice Recording to capture the patient's audio voice recording.



Select **Start Recording** and instruct the patient to state their name and the date of service.

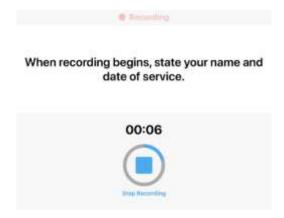








Select **Stop Recording** to end the recording once the patient has stated their name and the date of service. The recording will stop automatically if not ended before 30 seconds.



Select **Play** to play the recording. Select **Replace** to re-record or **Submit** to accept the recording. Once submitted, the **Patient Voice Recording** button updates to green to indicate that the recording was saved and the user can continue completing the visit.





The Patient Voice Recording label will appear on the visit, instead of the patient signature, to indicate that a voice recording was collected to verify the visit.



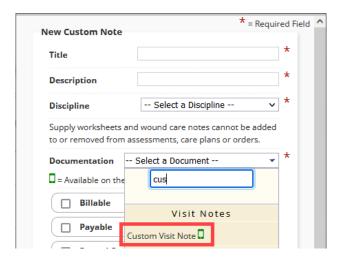
Once the visit is complete, the patient voice recording will save and store on the Electronic Visit Verification (EVV) log screen. Users can play and download patient recordings from this screen for auditing purposes. To access the Electronic Visit Verification (EVV)screen, navigate to the Schedule Center or Patient Charts and select on the green house associated with the visit.



#### **MOBILE DOCUMENTATION**

Mobile custom visit notes are available on iOS devices so caregivers can document visit information at the point of care. These must be set up in the Home Care web application by going to *Admin/Company Setup/Document Management*, selecting the **New** button and completing the New Custom Note box (permissions required).

In the Documentation field, select **Custom Visit Note** from the drop-down menu. The cicon appears next to documents that are available in the Home Care mobile app. Select **Save** to create the note.

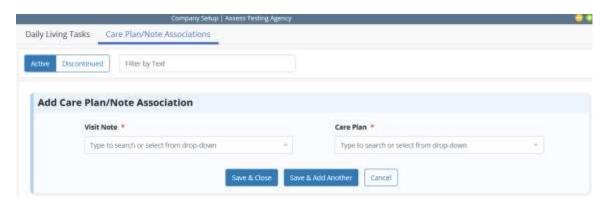






#### NOTE: Other Mobile notes can be added from here including Skilled Visit Notes.

Navigate to the Admin/Company Setup/Custom Care Documentation/Care Plan \_Note Associations tab at the top to link the new note to a care plan. Select Add New in the top right corner. Select the note from the Visit Note drop-down menu and link it to a care plan using the Care Plan drop-down menu. Select Save & Close. Once set up, schedule the custom visit note for any future visits.



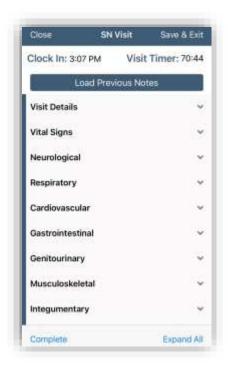
Select Visit Note to start mobile documentation inside the mobile app.



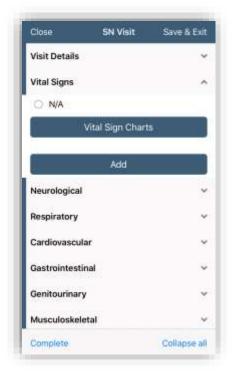
Below is Skilled Nurse Visit. The visit is split up into categories.







Select the category to expand the section or select the **Expand all** in the bottom right to open every category at once. Select **Collapse all** to minimize all categories at once.



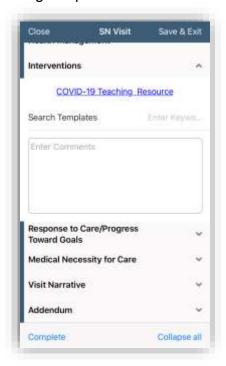
Below shows how users enter vital signs.







Some sections allow for entering comments, and other categories like interventions allow for entering template text inside the comments section.



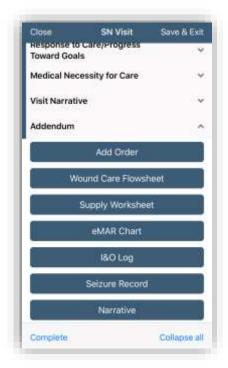
Enter a keyword inside the search templates section and select the applicable template.







Some sections have buttons that must be completed in the web application and not the mobile documentation.



Users will see the following notification.

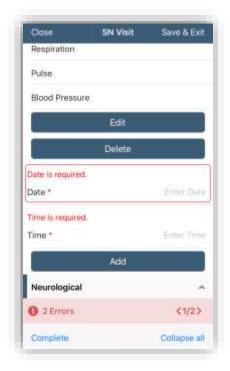






When documenting care in the Home Care mobile app, users can see the total number of errors in their documentation and follow step-by-step guidance on how to correct each error. Once a user finish documenting and selects **Complete**, guided validations appear.

Errors are highlighted in red with messages identifying how to correct each error. The total number of errors is provided in the red ribbon banner at the bottom of the note, and arrows in the bottom right corner enable users to navigate through each of the validation errors.



Select **Complete** in the bottom left when finished. Confirm the signature date, enter the signature time and select **Complete**.

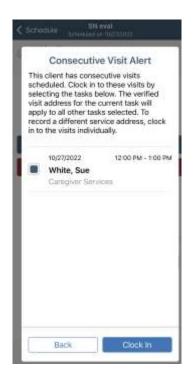




Enter the signature and select **Done** in the top right. A confirmation will appear. Select **OK**.

#### **Consecutive Visits**

To clock in and out for multiple consecutive visits at once, the caregiver must have two or more visits scheduled back-to-back for the same client. To clock in, select the earliest of the consecutive visits. On the selected visit screen, confirm that all information is accurate and select **Clock In**. If consecutive visits are scheduled, the **Consecutive Visit Alert** appears. Check the boxes next to the desired visits and select **Clock In**.

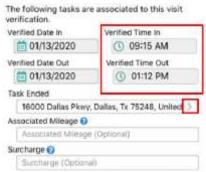






Users can cancel EVV clocking by selecting **Cancel** on the visit screen next to **Clock Out**. To cancel EVV clocking for multiple consecutive visits, caregivers must cancel each consecutive visit individually. Once the visits have been completed, select **Clock Out**. Selecting **Clock Out** triggers the **Time Review** screen where caregivers can review **Verified Time In** and **Verified Time Out** for the completed visits.

The **Task Ended** field accommodates consecutive visits that start and end at different locations. To document visits that started and ended at different locations, click the arrow next to **Task Ended** and select the address where the last visit ended.



On the right side of the **Time Review** screen, enter the duration of each visit. The **Entered Time** will update in the bottom right corner as each visit duration is entered. In the bottom left, the **Total Time** reflects the time span from **Verified Time In** to **Verified Time Out**. To facilitate EVV compliance, the system prevents users from collecting the client signature until the **Entered Time** and **Total Time** match.



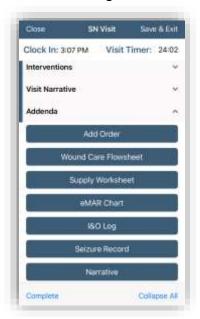




Once the Entered and Total Times match, select **Collect Client Signature**, sign and submit.

#### **Addendums**

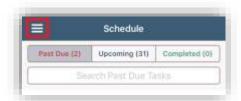
Axxess Home Care enables users to complete addenda through the mobile application. This functionality facilitates seamless documentation management and tracking to improve client outcomes and stay compliant. The following seven items can be added or documented during a visit:



- Orders
- Wound Care Flowsheet
- Supply Worksheet
- eMAR Chart
- I&O Log
- Seizure Record
- Narrative

#### **MENU**

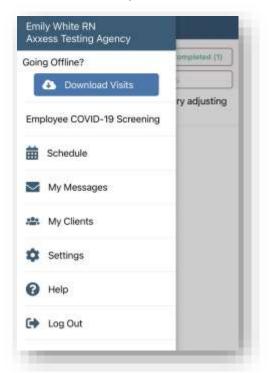
Select the three-line Menu button in the top left.



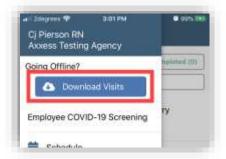




There are six options: **Schedule**, **My Messages**, **My Clients**, **Settings**, **Help** and **Logout**. **Logout** will leave the app. A login will be required to get back in. Select outside of the side menu to collapse the menu.



Select **Download Visits** and all visits for the current day and subsequent two days will download automatically.

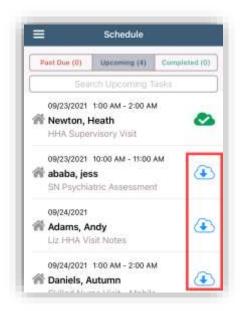


## **DOWNLOADED VISITS**

To use offline functionality, caregivers must first download upcoming visits that will be performed in areas without internet connectivity. To download visits, open the Home Care mobile app while still connected to the internet. Visits listed in **Schedule** can be downloaded by tapping the blue cloud icon to the right of the visit

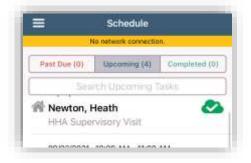






Once a visit has been downloaded, the blue cloud icon changes to an icon to indicate a successful download. Before going offline, confirm that all the necessary visits have green cloud icons indicating that they have been downloaded. Once all necessary visits have been downloaded, the user can go offline but must stay logged in to the Home Care app on the mobile device.

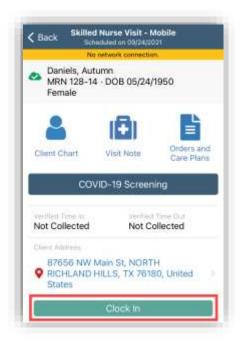
When the user has gone offline, a yellow banner will appear at the top of the screen to indicate that the user is offline, and the network connection has been lost. Visits that have not been downloaded appear with grey cloud icons indicating that they cannot be downloaded or performed offline.



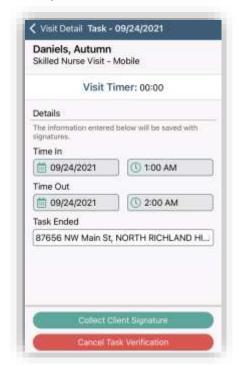
Select a visit to start offline documentation. Only visits with green cloud icons can be performed offline. To use offline EVV only, select the visit from the upcoming visits list and select **Clock In** on the start task screen.







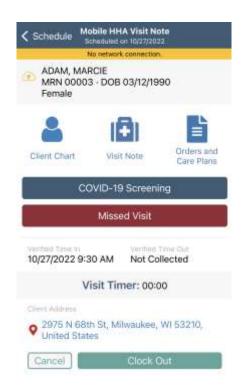
Select the back arrow in the top left corner of the screen.



The verified time in will populate and a yellow cloud icon will appear.







To end EVV for a visit, select **Clock Out**. On the Visit Verification screen, the text box under **End Visit Location Does Not Match Client Address** enables users to document the reason that EVV location was not used.



#### Offline Documentation

After opening a visit on the mobile app, select **Visit Note** to start documenting offline. Document the note as usual. When the visit is finished, select **Save & Exit** or **Complete**. When either button is selected, a message will confirm that





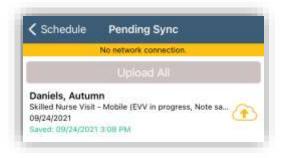
offline documentation has been saved, but the note cannot be completed until the user is back online.



Once the visit is saved, and connectivity is restored, the visit data must be synced. To sync the data, select the three-line menu in the top left corner and select **Pending Sync**.



Sync items individually by clicking the yellow cloud icon or sync all items at once by selecting **Upload All**. Once visit data is successfully synced, the visit will no longer appear in the **Pending Sync** window.







#### **MY MESSAGES**

Select **My Messages**. This is the HIPPA-Compliant, intra-organizational messaging feature. Messages are separated into three tabs: **Inbox**, **Sent** and **Deleted**. The bottom of the page will show the last time the messages were up to date, along with the total number of unread messages. Unread messages have a blue dot to the left. Swipe down to refresh the screen. To search through the messages, start typing in the text space below the tabs.



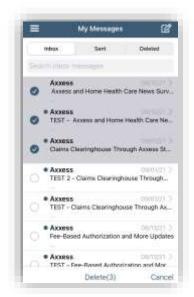
Select on a message to view. Select the trash icon in the bottom left to remove the message. Select **My Messages** in the top left to get back to the list.



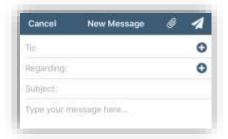
To remove multiple messages at the same time, select **Edit** in the bottom right. Select one or more messages. They will have blue checkmarks to the left. Choose all messages to be removed, then select **Delete** (\_) at the bottom of the page (the number in parentheses is how many messages are selected).



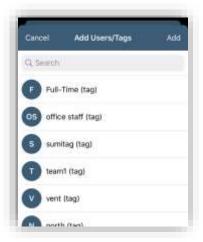




To write a new message, select the icon. Start typing the name of the user that is being sent the message in the "To" section. To search through the list of users, select the blue plus (+) icon on the right.



Search through the list by users or tags, select the user or tag to be included in the message.







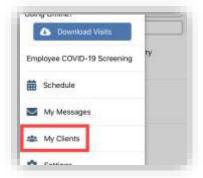
Once addressing who the message is going to, attach a specific client (optional) by typing their name in the regarding section or tapping the blue plus (+) sign to the right to search for a client. Type in a subject, then continue with the body text

of the message. Attachments can also be added by selecting the icon in the top right. After selecting the icon, choose to either **Take a photo** on the app or use a previously taken image in **Choose from Photo Library**. When the

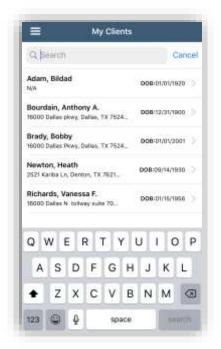
message is complete, select the send icon.

#### **MY CLIENTS**

My Clients is listed after My Messages. Users can search and view their list of clients.



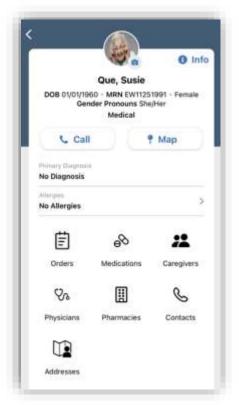
Users can search and view their list of clients.







Once the requested client has been found, select a name to view the client's profile.



Select **Allergies** to make updates to the allergies list.



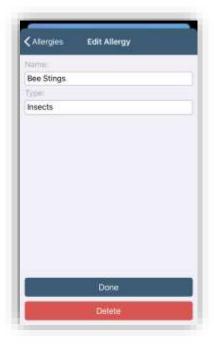
Select **Add Allergy** to add additional allergies. Enter the name and select inside type to see a list of categories. When finished, select **Done** or **Add Another** to add more allergies.







From the Allergies list screen, select any active allergies to make edits to. When completed, select **Done**. Select **Delete** to remove an allergy.



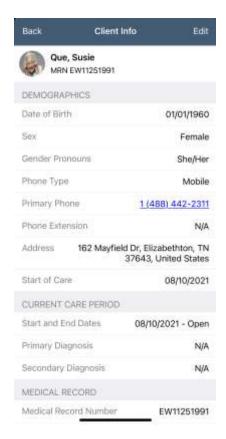
Select any deleted allergies and select the **Restore** button to turn them into active allergies.







Users can view specific client info including demographics, medical record, etc. by selecting **Info**. Make changes by selecting **Edit** in the top right.







From the client profile, users can add a client profile image from the library or camera by selecting the icon above the client's name.



Navigate to the client's location by selecting the **Map** button and then choose from downloaded mapping apps.



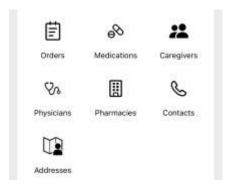
Users can also call the client's directly from the client profile by selecting the **Call** button.







Select **Orders, Medications, Addresses** and **Pharmacies** to view lists. Select **Caregivers**, **Physicians** and **Contacts** to view lists. Quick links are available to call directly from the app.



# **SETTINGS**

The Settings area is found on the side menu.



Users can decide if they want to use Face ID for logging into the app or Wi-Fi only for downloading or syncing.



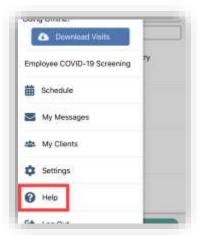




Caregivers can set their mobile devices to Spanish to view Spanish translations. Once the primary language on a caregiver's device is set to Spanish, the caregiver can log in to the mobile app to view menu items, error messages and labels in Spanish.

# **HELP**

The **Help** area is found on the side menu.



The top section is to reset the password. Enter the email address associated with the account and select **Reset Password**. To call Axxess Support, we are available Monday - Friday from 5:00 am – 9:00 pm CT.



Select **Call Us** to auto-dial the Axxess support phone number. The mobile app version can be found at the bottom of the **Help** screen if needed.

