HOME CARE ADMINISTRATOR FLOW CHART

February 2022

Company Setup

Admin/Company Setup

Company Setup

Axxess password must be entered in order to view/edit.

Information

Decide company-wide settings. See Admin Overview Manual for details.

Subscription Plan

Adjust the organization's Monthly Subscription plan.

External Integrations

Organizations can connect their Home Care application to selective outside vendors.

Billing

Organizations must choose billing settings and EVV Time Management.

Financial

Choose financial settings including closed accounting date and assign account numbers.

Admin/Company Setup/Payroll

Payroll Policy

Determine how employees will be paid when it comes to mileage, travel time, payroll dates, times, rounding, meal breaks, overtime and municipalities.

Pay Rates

Add company default and specific rates for tasks.

Holidays

Users can enter default holidays or create their own organization specific holidays.

License and Compliance

Allows organizations to manage licenses or compliance items that must be completed or updated.

Clinical

Organizations must choose Clinical settings including PDF Format and the Physician Certification Statement.

Scheduling

Organizations must choose scheduling settings including Family Care and Matching Criteria.

Document Management

Organizations can create, edit and deactivate custom notes.

Admin/Company Setup/Custom Care Documentation

Scoring Lists

Enforce score entry when a caregiver indicates the completion of a client's goal and create scoring lists

Daily Living Tasks

Organizations can determine what daily living tasks that their employees can be asked to perform.

Admin/Company Setup/Custom Service Documentation

Service Plan/ Note Associations

Organizations can add relationships between visit notes and service plans.

Care Plan/ Note Associations

Organizations can add relationships between custom visit notes and custom care plans.

Admin/Company Setup/Client Chart Information

Emergency Triage Levels

Organizations can choose from either default triage levels or add ones of their own.

Services Required

Organizations can add default services, create, update and delete services.

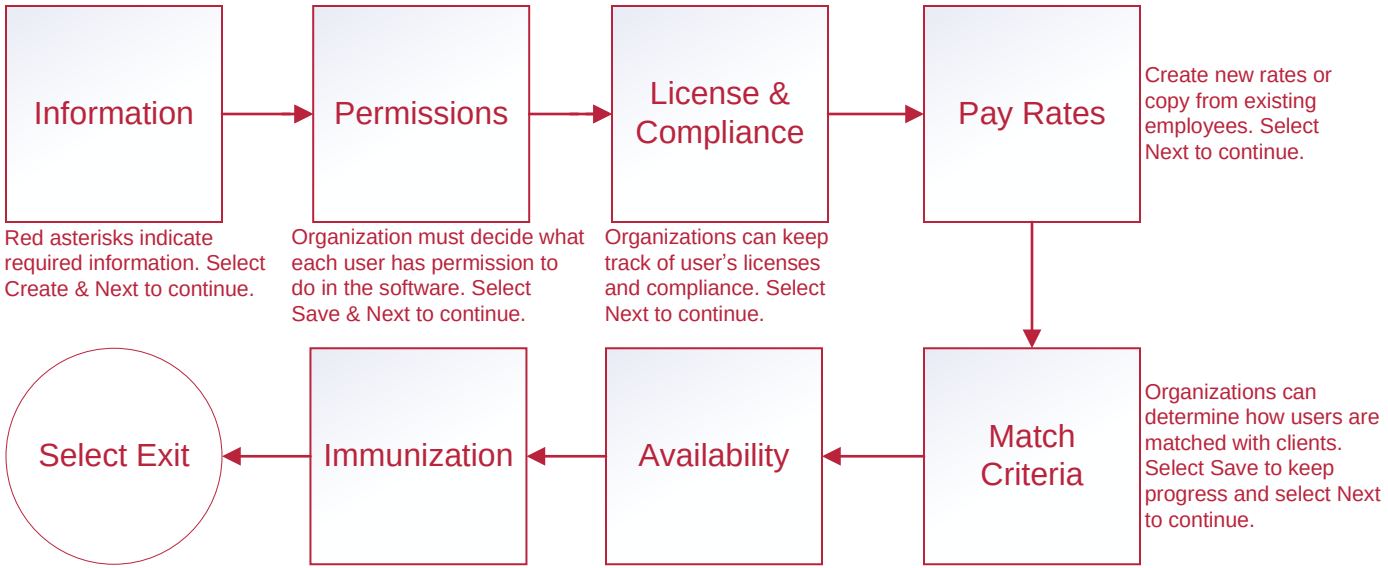
Durable Medical Equipment

Organizations can add default DME, create, update and delete DME.

Users

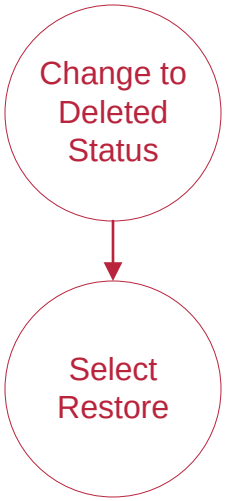
Add New User

Admin/New/User



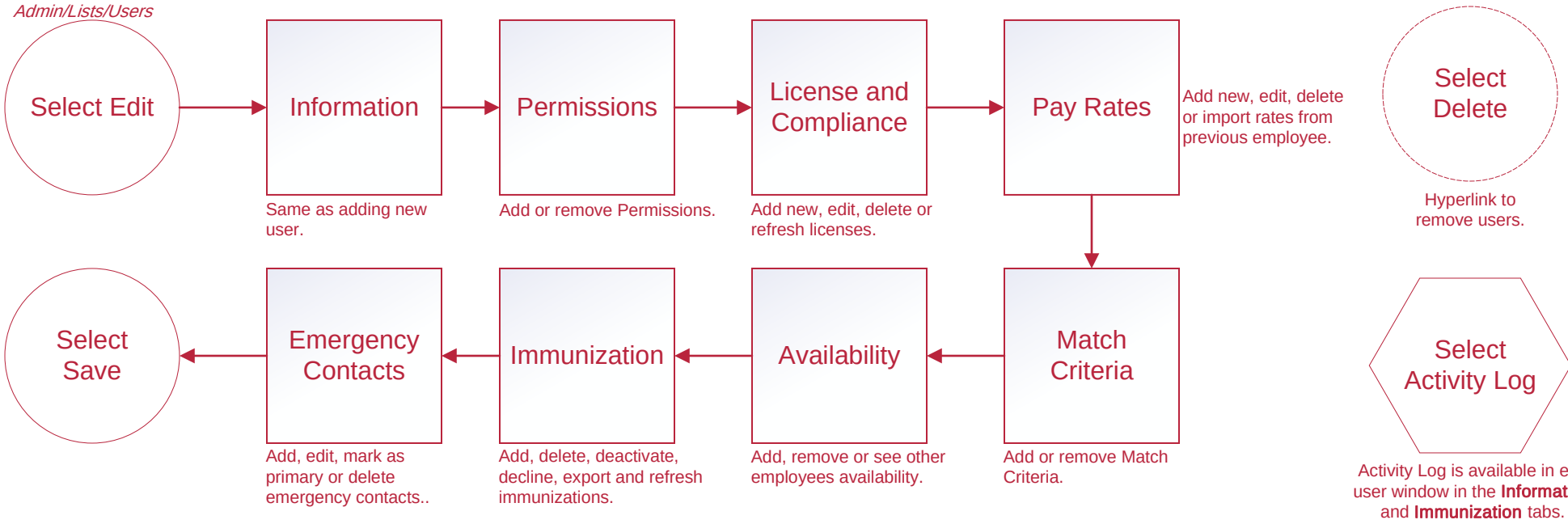
Retrieving Deleted Users

Admin/Lists/Users



Edit User

Admin/Lists/Users

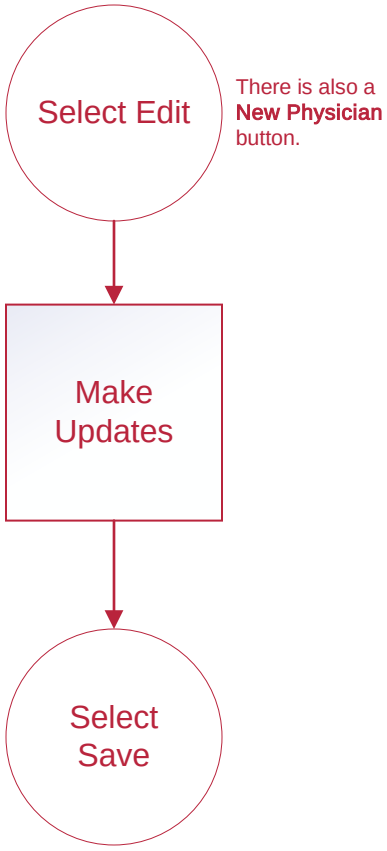


Physicians, Facilities and Pharmacies

Functionality works the same for Physicians, Facilities and Pharmacies.

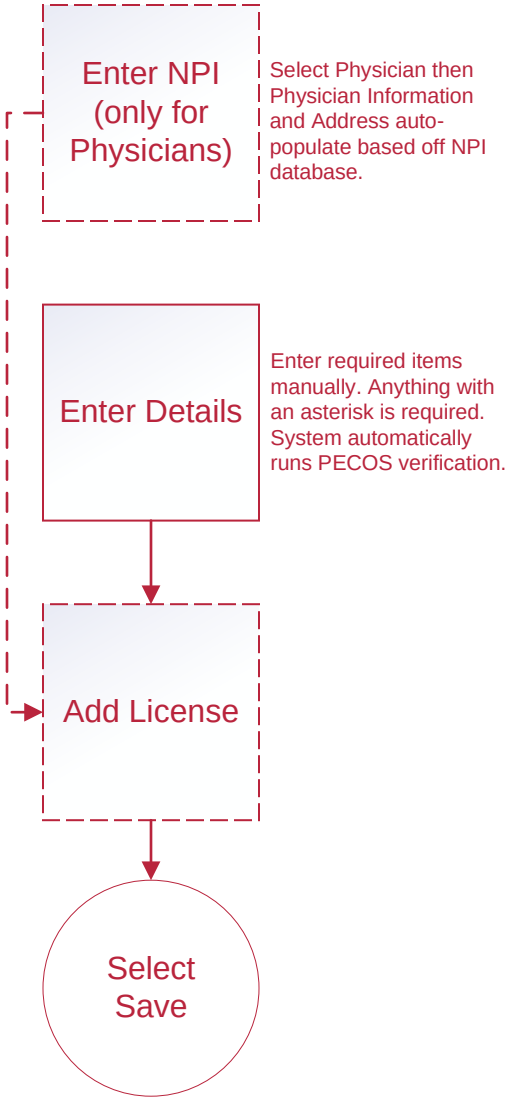
Edit Physicians

Admin/Lists/Physicians



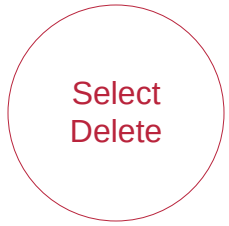
Add New Physicians

Admin/New/Physician



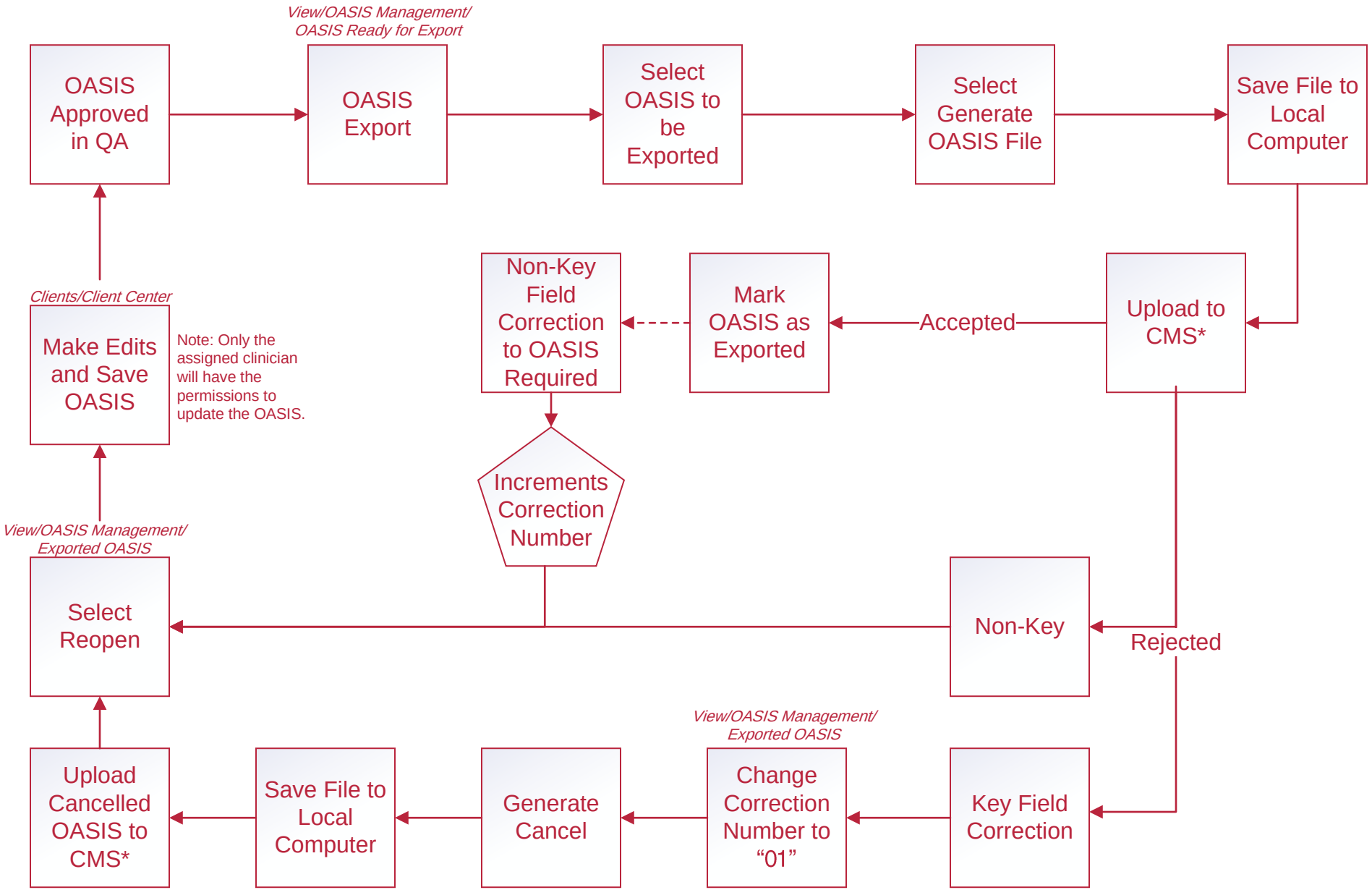
Remove Physicians

Admin/Lists/Physicians



Activity Log is only available in edit window. Shows which users have edited entries and when.

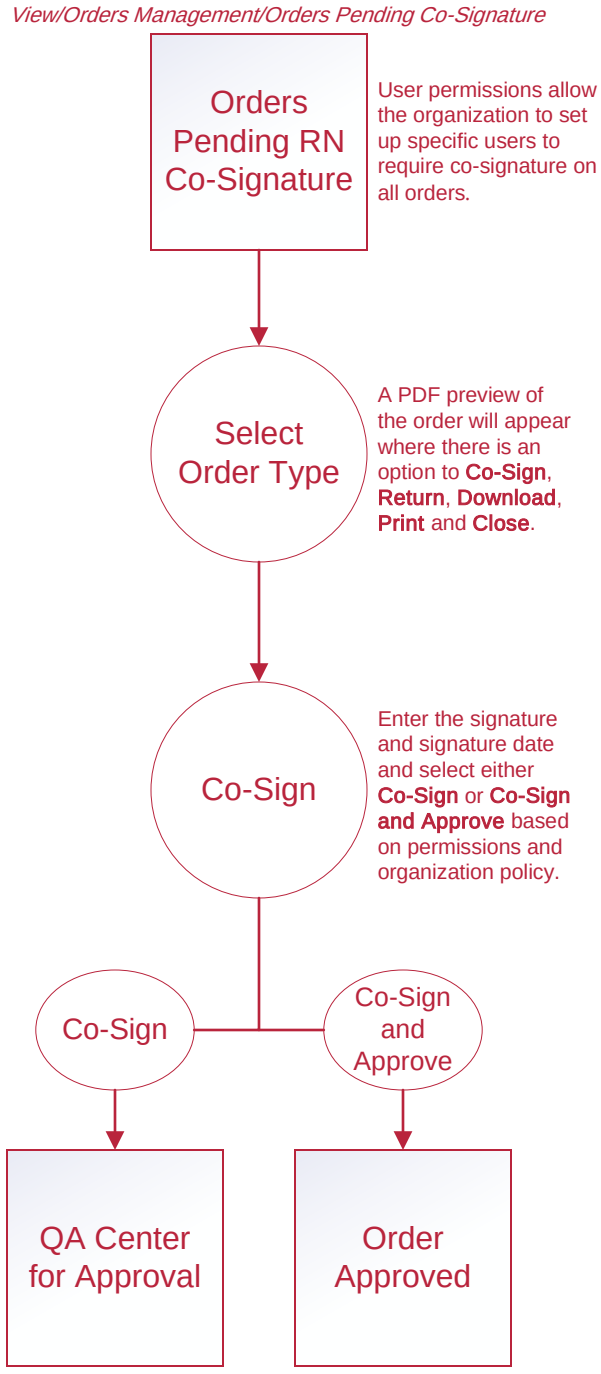
OASIS Submission and Correction



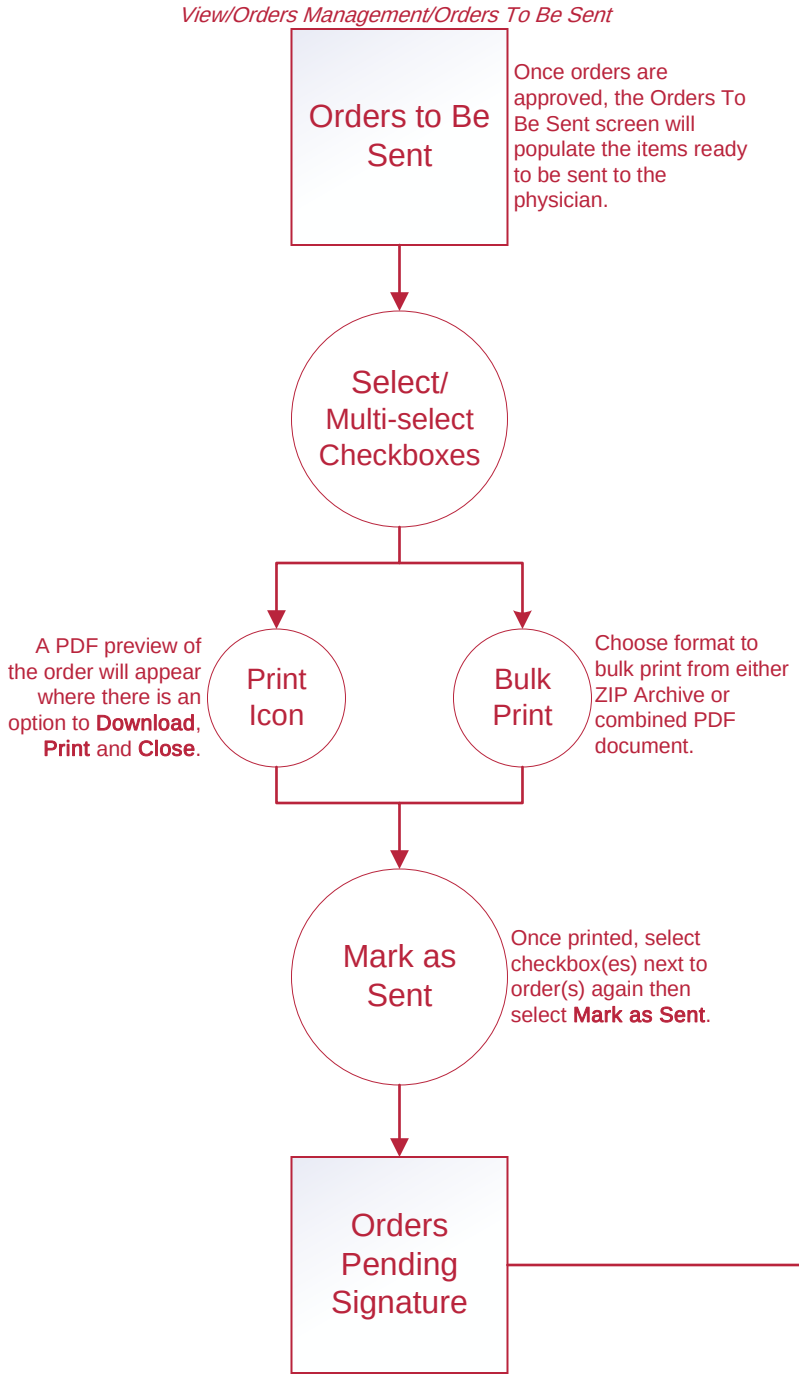
*Steps are completed outside of Axxess Software

Orders Management

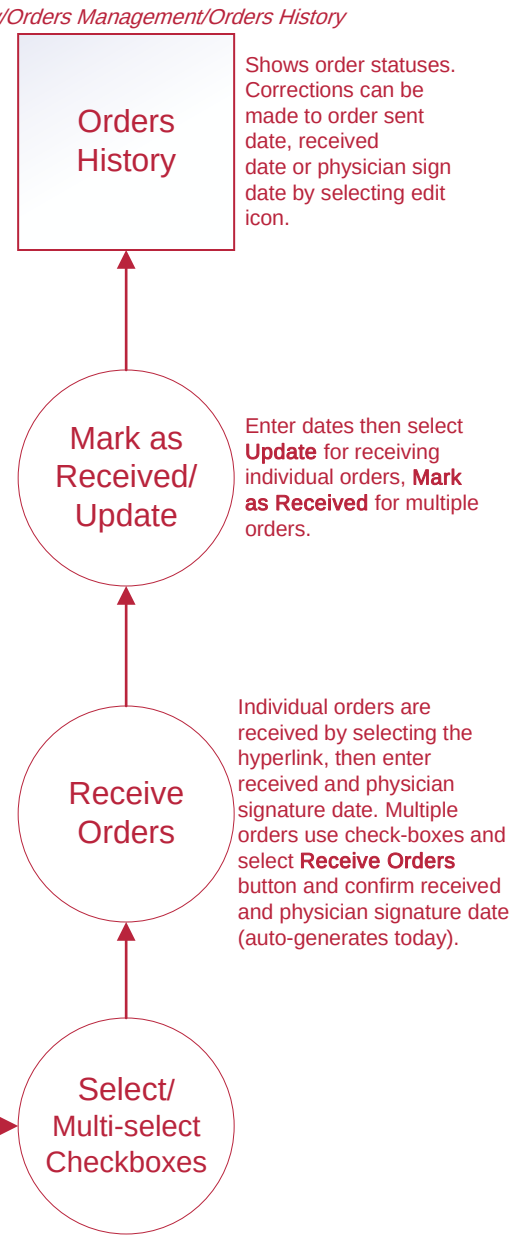
View/Orders Management/Orders Pending Co-Signature



View/Orders Management/Orders To Be Sent



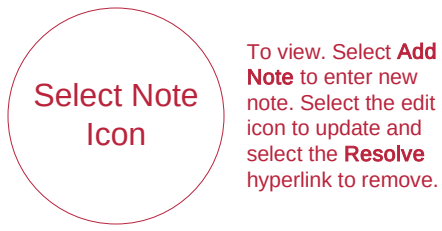
View/Orders Management/Orders History



View/Orders Management/Orders Pending Signature

Export List

Order Notes



Insurances/Payers

Add New Payer

Admin/New/Payment Source

Step 1: Information → Enter Display Name and Choose Invoice Type* → Choose Tax ID* → Enter Payer ID*

Whichever invoice type is chosen will dictate which tabs will be available on the left.

Automatically has Stand-Alone Branch Tax ID or Agency Tax ID selected.

Enter Non-Required Items

Enter non-required sections Information, Billing Provider Information, Payer Information, Contact at Payment Source and Authorization Setup

If UB-04 or HCFA 1500 were chosen, a Clearinghouse will have to be chosen. Then the agency must decide who is doing the billing. Then enter the Payor Information.

Required sections that are missing information are highlighted red.

Select Save

Step 2: Invoice Type → Enter HCFA Details / Enter UB-04 Details → Add Provider(s) → Add Bill Rate(s) → Select Save & Close

Select Add Provider button. Then choose Qualifier, Locator Field, Value Source and Other ID Qualifier.

Select Add Bill Rate button. Then choose Task, Preferred Description, Service Unit Type and Unit/s Per Visit.

Enter Invoice Details → Add Invoice Rate(s)

Select Add Invoice Rate button. Then choose Task, Preferred Description and Service Unit Type.

*Required

Edit Payer

Admin/Lists/Payment Sources

Select Edit

There is also a **New Payment Source** button.

Make Updates

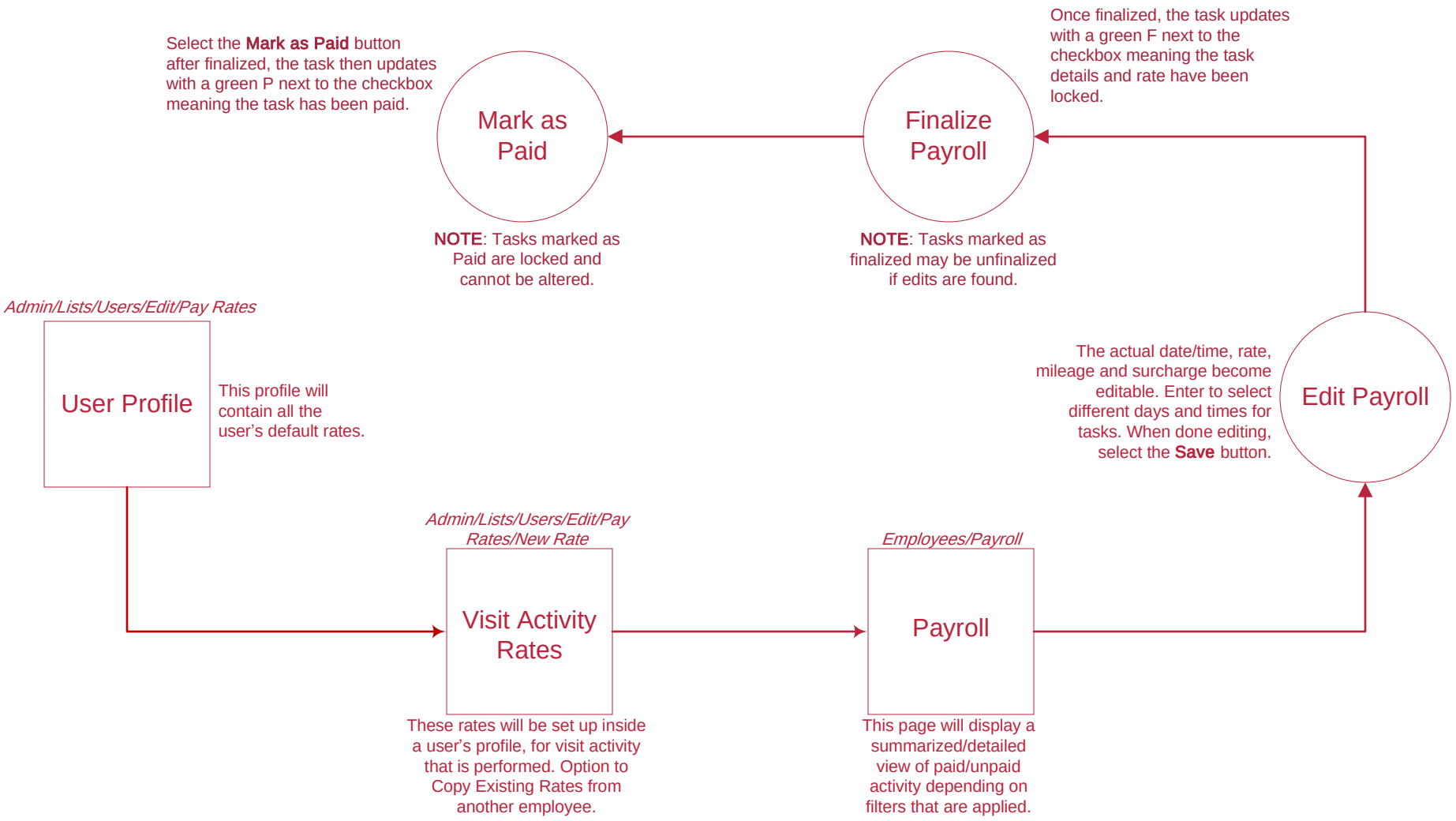
Save, Save & Close or Save and Next

Remove Payers

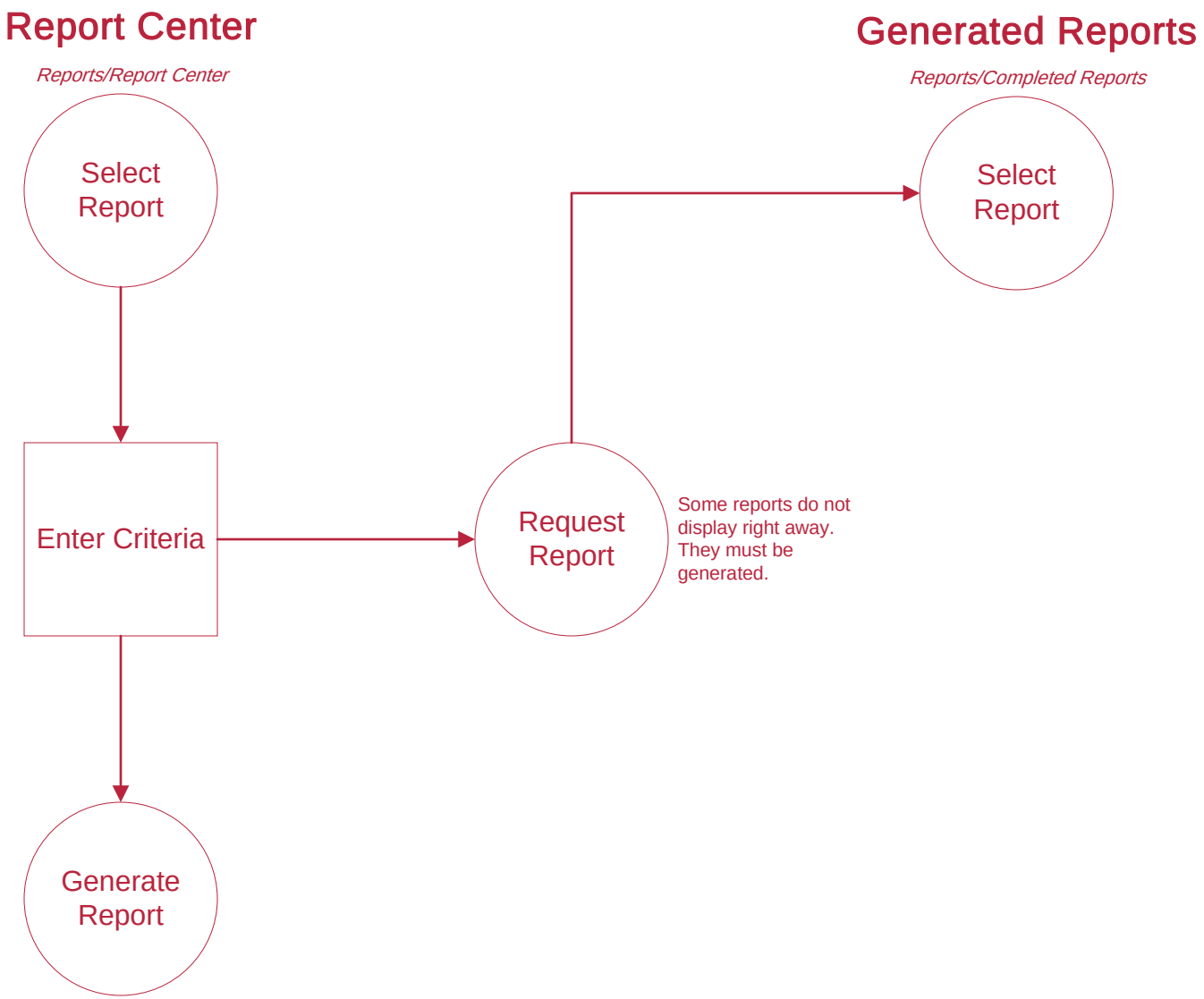
Admin/Lists/Payment Sources

Select Delete

Payroll


Select the **Mark as Paid** button after finalized, the task then updates with a green P next to the checkbox meaning the task has been paid.
Mark as Paid
NOTE: Tasks marked as Paid are locked and cannot be altered.
Finalize Payroll
NOTE: Tasks marked as finalized may be unfinalized if edits are found.
Once finalized, the task updates with a green F next to the checkbox meaning the task details and rate have been locked.
Admin/Lists/Users/Edit/Pay Rates
User Profile
This profile will contain all the user's default rates.
Admin/Lists/Users/Edit/Pay Rates/New Rate
Visit Activity Rates
These rates will be set up inside a user's profile, for visit activity that is performed. Option to Copy Existing Rates from another employee.
Employees/Payroll
Payroll
This page will display a summarized/detailed view of paid/unpaid activity depending on filters that are applied.
Edit Payroll
The actual date/time, rate, mileage and surcharge become editable. Enter to select different days and times for tasks. When done editing, select the **Save** button.

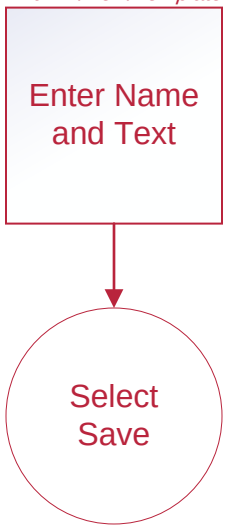
Reports


Report Center
Reports/Report Center
Select Report
Enter Criteria
Request Report
Some reports do not display right away. They must be generated.
Generate Report
Generated Reports
Reports/Completed Reports
Select Report

Templates

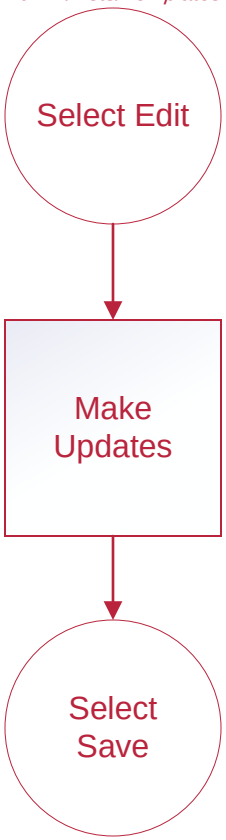
Add New Template

Admin/New/Template



Edit Template

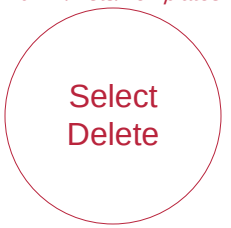
Admin/Lists/Templates



There is also a New Template button here.

Remove Template

Admin/Lists/Templates



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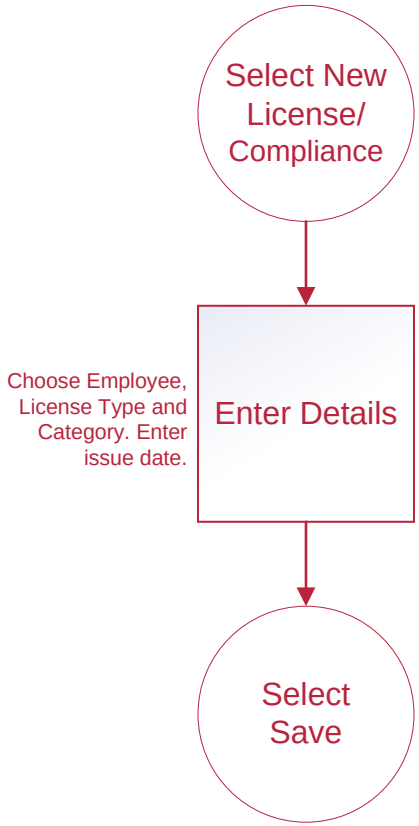
License Manager

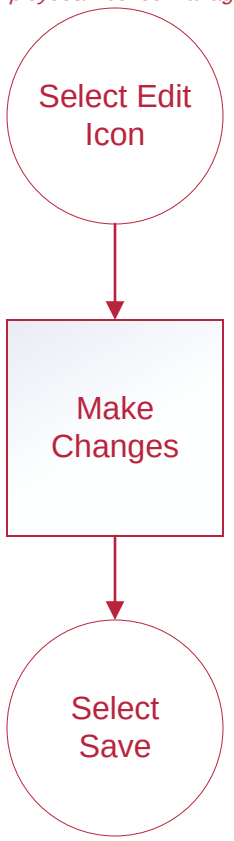
Add Non-User License

Employees/License Manager



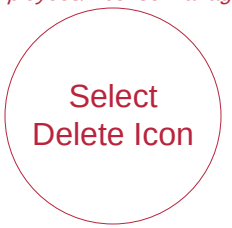
Edit License

Employees/License Manager



Remove License

Employees/License Manager



Supplies, Adjustment Codes and Document Types

Functionality works the same for Supplies, Adjustment Codes and Document Types.

Add Supplies

Admin/New/Supply

Enter description, HCPCS, revenue code and unit cost.

Enter Details

Select Save

Edit Supplies

Admin/Lists/Supplies

Select Edit

Make Changes

Select Save

Remove Supplies

Admin/Lists/Supplies

Select Delete

Select Activity Log

Activity Log is only available in edit window. Shows which users have edited entries and when.

Service Plans

Add Service Plan List

Admin/New/Service Plan List

Enter service plan category name and choose list type.

Name and List Type

Enter list item and select the **Add List Item** button.

Add List Items

Or select **Save & Add New** for additional service plan list.

Select Save and Exit

Edit Service Plan Lists

Admin/Lists/Service Plan List

Select category plus sign icon. Also add new list by selecting **Add New List** button.

Add List Item

Select **Delete List Item** hyperlink to remove. Change task order by selecting up or down arrows.

Select Add New List Item

Enter Task Name

Select Save or Save and Exit

Change List Order

Select up or down arrows.

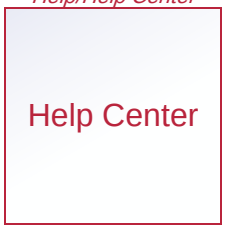
Deactivate

Confirm

By selecting **Yes** button.

Help Center Process

Help/Help Center



This center will provide step-by-step instructions on areas of the software, as well as instructional videos.