HOME CARE CLINICIAN
QUICK REFERENCE GUIDE
February 2022

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LOGGING IN

1. Go to www.axxess.com and select **LOGIN**.
2. Enter your Email Address and Password. Select **Secure Login. NOTE:** If your password is forgotten, select **Forgot your Password** and a link will be sent to the email address used at sign-in.
3. Confirmation Login Successful. Select **OK.**

AXXESS PLANNER

Select 🛈 to see explanation of section.

1. Date/Time/Weather - Today's date, time and five-day weather forecast for the user's specific area.
2. Today's Visit Schedule - Red dots are on dates with visits.
   a. Select a day on the calendar.
   b. Select Task.
   c. Select **START** to begin visit or select **Patient Chart** to see chart.
3. Today's Visits Map

Green - Current Location, Red - Visit Location, Blue - Selected Visit (marker).

   a. Select the marker for details.
   b. Select **Get Directions** for Google Maps directions.
4. Unread Messages - Selecting a message takes the user directly to the messaging center.
5. Past-Due Visits - Select the **OPEN** tab to go to the note.
6. Alerts - Select the **OPEN** tab to go to the note.
   a. Hover over the red sticky note.
   b. Select **View Comments**. If necessary, write in the response and select **Add Comment.**

DASHBOARD

The dashboard will display six tiles for all users. More permission-based tiles can be added.

1. Welcome Panel - Items for subscribers to Axxess products. These will include items such as important announcements and training videos.
2. My Scheduled Tasks - Electronic "To-Do" list. Users can quickly access a client chart and/or tasks for the first five clients on their to-do list. Select **View All Tasks** to see My Schedule.

3. Messages - HIPAA-compliant messaging center, allowing all users to communicate in a secure manner. When the user receives messages, notifications will be sent to the user's email assigned to their account. Select **View All Messages** to go to the Message Center. Select **Compose** to add a message from the tile.
4. News and Updates - Links to Axxess generated blog posts, educational articles, regulatory updates and other important information. Select **View All News and Updates** to view the Axxess Blog.
5. Alerts - Provides direct access to important alerts. Select **View All Alerts** to go to the Alert Center. Select **Mark as Viewed** to remove the alert.
6. Client Birthdays - This is a quick reminder of the clients who will celebrate birthdays in the upcoming week/month. Select the phone number to call directly from the tile.

My Scheduled Tasks

Select **View All Tasks** to view the entire list of scheduled tasks.

- View the calendar by Month, Week or Day.
- Export the data into a spreadsheet by selecting **Excel Export**.
- Print calendar by selecting 🖨.
- Refresh by selecting 🔄.

Tasks show in four different colors:

🟦 Scheduled   🟩 Completed   🟥 Missed   🟧 Returned
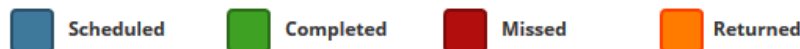
Hover over task to:

- Edit Document 🖊 - Jumps straight into documentation for client.
- Print 🖨 - Displays the print view of the document. From here, the document may be downloaded or printed.
- Missed Visit Form 📅 - *See below.*
- Edit Scheduled Date/Time 📅 - Update the date and time of the task.
- Reassign 🗓 - Assign the task to another user.
- Delete 🗑 - Remove the task.
- Quick Details 📋 - Access to the most relevant scheduling information.

Select **List Tasks** or the List Tasks tab to view as a list. Select ⟩ for same functionality as hovering in the calendar view.

Sticky Notes:

🟧 Orange - Return Reason from either QA Center or another clinician.
🟨 Yellow - A note pertaining specifically to this visit.
🟥 Red - Missed Visit.
🟦 Blue - This information will appear in a sticky note on every visit in that care period.

Missed Visit Form

1. Select Missed Visit Form 📅.
2. Choose whether Order Generated, Physician Office Notified, Tracking Type and Reason.
3. Enter Comments.
4. Add optional attachments by selecting **Browse**.
5. Enter Signature and Signature Date.
6. Select **Submit**.

Hovering over the missed visit will allow users to Restore 📅 if mistakenly missed.

EDIT PROFILE
Home/My Account/Edit Profile

1. Update Password, Electronic Signature, Address or Phone Numbers.
2. Select **Save**.

NOTE: If the signature is forgotten, it will need to be reset.

RESET SIGNATURE
Home/My Account/Reset Signature

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

CLIENT CENTER
Clients/Client Center

1. Choose a Branch, Status, Type, Payer, Tags and/or type any part of client name.

2. Select Client.
    a. Group by, choose discipline (Show) and range (Date).
    b. Select task/visit hyperlink.
    c. Action Menu/Details.
    d. Select **More** hyperlink to view additional client info.

TASK DETAILS
Make edits to:

- <u>Scheduled Start and End Time</u> **-** The date the task was scheduled on the calendar.
- <u>Actual Visit Date/Time In and Out</u> **-** The date/time the task was completed. This is pulling from the task completed by the clinician.
- <u>Assigned to</u> **-** The clinician that is currently assigned to this task.
- <u>Payer</u> - The payment source for the task can be changed by selecting **Load Payers**.
- <u>Comments</u> (Yellow Sticky Note) - Any notes pertaining to this specific visit and are needed to communicate with other users within the organization.

QUICK REPORTS
NOTE: The following Quick Reports are permissions-based.

Client Profile
PDF print out of client information. Select **Download** and/or **Print** to have a copy.

Treatment Profile
- Select **Print Treatment Profile** to get a printed version.
- To add a new treatment:
    o Select **Add Treatment**.
    o Enter the Start Date and End Date.
    o Choose Treatment.
    o Enter Description.
    o Choose Frequency.
    o Select **Save & Close**.
- Select **Edit, Delete** or **Discontinue** (under Action menu) to make changes.
- Select **Refresh Treatments** to make the list up to date.
- To reorders treatments:
    o Select **Reorder Treatments**.

o Select an arrow to move up or down list.
o Select **Save**.

Medication Profile

Print Medication Profile and/or **Reorder Medications**. To add a new medication:

- Select **Add Medication**.
  - o Indicate whether it is Long Standing.
  - o Enter Start Date and DC Through Date.
  - o Start typing the medication, then select **Search for Medication**. Select the medication from the drop-down menu. **NOTE**: Medications not listed can be added. However, only medications selected from the drop-down will be checked for drug interactions.
  - o Suggested classifications will be listed if a database medication is chosen.
  - o Enter frequency (shorthand accepted), route and choose type.
  - o Start typing the name of the physician and select from drop-down menu.
  - o Start typing the name of the pharmacy and select from drop-down menu.
  - o Select **Save & Exit.**
  - o Choose to **Add Another Medication, Create Order** or **Close.**
- Select **Drug Interactions.**
  - o Check medication boxes.
  - o Select **Check Interactions.**
  - o Drug-Drug Interactions PDF will generate.
- Select **Sign Medication Profile.**
  - o Enter Signature and Date.
  - o Select **Sign.**
- Select **Edit, Delete** or **Discontinue** (under Action menu) to make changes.
- Select **Signed Medication Profiles** to see previously signed profiles.

Infectious Disease Profile

To add a new screening:

1. Select **Add COVID-19 Screening**.
2. Complete the screenings questions.
3. Assign a risk level.

4. Enter signature. Select **Sign Screening** or **Sign & Add Another** for additional screenings.

Immunization Profile

To add a new immunization:

1. Select **Add Immunization**.
2. Choose the Type of Immunization, enter Administration Date and choose who it was Administered By.
3. Select **Save & Close** or **Save & Add Another** to continue with additional immunization.

Delete or **Deactivate** from the active list.

To add a declined immunization:

1. Select **Decline/Contraindicate Immunization.**
2. Choose the Type and enter the Documentation Date. Check Declined or Contraindicated.
3. Select **Save & Close** or **Save & Add Another** to continue with additional immunization.

Inactive Immunizations - to reactivate, select **Reactivate**.

Allergy Profile

To add a new allergy:

1. Select **Add Allergy.**
2. Type in the Name and Type.
3. Select **Save & Add Another** for additional allergies or **Save & Exit.**

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

Authorizations Listing

Shows all current authorizations. Authorizations are typically added by office staff.

Communication Notes

Choose the Care Period. Start Typing either the Employee Name, Subject, Date or Status to narrow down. To add a communication note:

1. Select **New Comm. Note.**
   a. Choose the Care Period associated.
   b. Enter the Physician.
   c. Enter the Communication Text.
   d. Decide whether to "Send note as Message."

e. Enter Staff Signature and Signature Date.
f. Select either **Save** or **Complete**.
- Select **Edit** or **Delete** to update.

Orders and Care Plans

View client order history.
- Choose the date range to filter**.**
- Select type hyperlink to view.
- Select **Excel Export** to view a spreadsheet version.
- Select 🖨 to view PDF version or 🗑 to remove.

Vital Sign Charts

View vital signs taken in two different ways:
- Select **Vital Sign Charts** or **Vital Signs Log.**
- Select **Refresh** to see up to date numbers.

Seizure Records

- Enter the Date Range.
- Select 👁 to view, 🖨 to print or 🗑 to remove.

NOTE: New records can only be added inside of a visit.

eMAR

- View by day, week or month.
- Medications taken are green. Medications refused/not taken are red.
- Edit previous entry by hovering over the scheduled medication time and selecting 📝. Select 🗑 to remove.
1. To schedule, select an empty calendar square.
   a. Confirm the log time.
   b. Choose was the medication taken. If no, choose the reason the medication was not taken.
   c. Choose clinician.
   d. Enter user initials and any comments.
   e. Select **Save & Close**.

Vent Flow Sheet

- Enter the task date range to filter. Start typing the task, task date, vent type or employee to narrow down.

- Select **Edit** to update, **Delete** to remove or 🖨 to print.

I&O Logs
- View I&O Logs Report or I&O Logs Details.
- To make updates, select the **Edit/Delete Details** hyperlink.
- To add a log, select **Log Input Record** or **Log Output Record**.
    a. Enter the log date and time.
    b. Choose the type.
    c. Enter the amount and whether total or per hour.
    d. Enter any comments.
    e. Select **Save & Close**.

Hospitalization Log
- Select the 🖨 icon to view PDF version. Select **Edit** or **Delete** to update or remove.

NOTE: Hospitalizations cannot be entered from here. They must be entered from *Clients/Client Center/Change Status.*

Triage Classification
- Select **Download** or **Print** for Emergency Preparedness Plan.

Client Service Goals
To add a service goal:
1. Select **New Goal**.
2. Enter the effective date.
3. Enter the goal/objective.
4. Enter the discontinuation date.
5. Select **Save**.

To end a goal:
1. Select **Discontinue**.
2. Enter the discontinue date.
3. Choose a reason.
4. Select **Discontinue** to discontinue or select **Discontinue & Copy** to discontinue the goal and copy the goal text into a new goal for editing.

Supply Log
Displays each supply worksheet addendum.

- Search by date range or write in description.
- Select **Excel Export** to view a spreadsheet version.
- Users with permissions can select **Edit** to make updates or **Delete** to remove.

Suction Log

Displays each suction log addendum.
- Search by date range.
- Select **Excel Export** to view a spreadsheet version.
- Users with permissions can select **Edit** to make updates or **Delete** to remove.

Oxygen Safety Risk

Displays each oxygen risk addendum for clients who require oxygen.

To identify a client's need for oxygen:
1. Edit the client's profile.
2. Navigate to the **Medical Information** tab.
3. In the Oxygen section, check the box next to "Click here if the client requires oxygen."
4. Select **Save**

- Search by date range.
- Select **Excel Export** to view a spreadsheet version.
- Select 👁 to view, 🖨 to print or 🗑 to remove.

Fall Risk

Displays each fall risk addendum.
- Search by date range.
- Select **Excel Export** to view a spreadsheet version.
- Select 👁 to view, 🖨 to print or 🗑 to remove.

Deleted Tasks/Documents

See Deleting a Task below

CLIENT CHART TABS

CREATE
Order
Client Center/Create/Order

1. Choose the care period associated (option for next care period).
2. Enter the date and time.
3. Locate the client's physician by typing the name and select from the drop-down (options for do not send and/or no physician signature required).
4. Enter the Summary/Title and order descriptions - optional load template for pre-defined choices.
5. Indicate whether "Order read back and verified."
6. Enter signature, signature date and signature time.
7. Select either **Save & Exit** to keep or **Complete** to finish**.**

Communication Note
Client Center/Create/Communication Note - Instructions for the new note above.

Authorization
Client Center/Create/Authorization

1. Enter the start and end date.
2. Choose authorized tasks, payment source and status.
3. Enter the authorization number.
4. Enter units.
5. Choose unit type, frequency of units, days authorization restricted to.
6. Enter total units. Option to **Calculate Total**.
7. Option to enter comments and add attachments.
8. Select **Save**.

View – Select the **View** tab to see Quick Reports.

Schedule Activity
Select **Schedule Activity** to be taken to the Schedule Center filtered for client.
See Schedule Center below.

New Document
Client Center/Documents/New Document

1. Choose the Document Name.
2. Select **Browse** and find the file on computer.
3. Select **Upload**.

View Documents
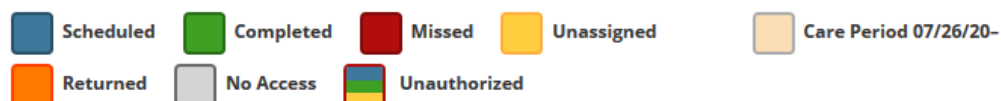*Client Center/Documents/View Documents*

- Select the **File Name** hyperlink to view.
- Select **Add Document** to upload a document.
- Select **Edit** to update or **Delete** to remove.

SCHEDULE CENTER
Client Center/Schedule Activity or *Schedule/Schedule Center*

- View the client (default) or employee schedule.
- Search in the top left.
- View by day, week or month.
- View by calendar or select **List Tasks** for line-by-line view.

Tasks are shown in color that corresponds to the status of the task. The following is the color legend:

Scheduled   Completed   Missed   Unassigned   Care Period 07/26/20–
Returned   No Access   Unauthorized

SCHEDULING A TASK (PERMISSIONS-BASED)
Schedule Center/New/Client Task or select any free space on a desired time of the task to be added.

1. Choose shift length and whether to override shift length or schedule without time.
2. Enter the from and to date and time.
3. Choose the payment source and task.

4. Choose recurrence. If so, enter repeat until and repeat every.
5. Choose caregiver/employee completing the task or **Find a Match**.
6. Enter optional Comments.
7. Select **Save & Close** for a single task. Select **Save & Add Another** for more than one.
- Hover over the task to Document, Print, Missed Visit Form, Edit Scheduled Date/Time, Reassign, Restore, Delete or view Quick Details.

Task Details (permissions-based)
In the List Tasks view:
1. Select **Details** in the Action drop-down.
2. Make edits, add comments, view the **Supply Worksheet**, add attachments or view the **Activity Log**.
3. Select **Save** to keep updates.

DELETING A TASK (PERMISSIONS-BASED)

1. Hover over a task and select 🗑 or (from the task list view) go to the Menu drop-down.
2. Select **Delete**. The confirmation will appear.
3. Select **Yes**.

To retrieve a deleted visit: *Client Center/Quick Reports/Deleted Tasks Documents*

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

OASIS-D1 START OF CARE

1. Patient Charts or Schedule Center and select OASIS D1 Start of Care. **NOTE**: If previously with organization, load previous SOC Assessment by choosing from the drop-down and selecting **Load Assessment.**
2. Answer assessment questions. **NOTE**: Some information is previously entered from referral/admission.
   - **Green Boxes** - OASIS M questions.
   - **Grey Boxes** - Pull to Plan of Care.
   - **Cream Boxes** - Physical Assessment.
3. Replace asterisks ** with patient-specific information.
4. When the assessment is completed, select **Check for Errors**.

a. Warnings have the ⚠️ icon.

b. Fatal errors have the ⊗ icon. Users cannot finish OASIS with error messages.

c. Confirm the HIPPS Code, OASIS Claim Matching Key, and HHRG scores all have a code.

5. An optional **OASIS Scrubber** will look for any inconsistencies or flags that the organization may want to address.
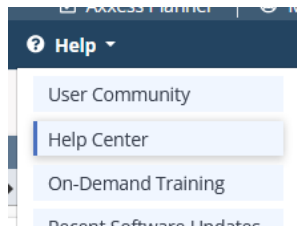
Fill out the Clinician Signature, Date and Time, then select **Complete.**

HELP CENTER

Help/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 of all of Axxess' products. It can be accessed by going to:

Or also available at https://www.axxess.com/help/