

# **HOME CARE ORDERS MANAGEMENT QUICK REFERENCE GUIDE**

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## ORDERS MANAGEMENT OVERVIEW

### *View/Orders Management*

Navigation links appear in the top-right corner of each screen. Users can select these links to navigate to the corresponding pages. Select the **Export** button to generate a list in Excel.

### **Orders Management Notes**

To view or enter order notes:

1. Select the  icon to enter comments for the corresponding order.
2. To enter a new note, select **Add Note**.
3. To update a note, select the  icon. To remove a note, select the **Resolve** hyperlink.
  - a. To view all resolved notes, select the resolved filter. The note icon will turn green once resolved.


The note icon turns blue once a note has been entered. Hover over the blue note icon to view the notes entered. Up to three notes can be viewed when hovering over the icon. To view additional notes, select the note icon.

## ORDERS TO BE SENT

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

A window will populate the items ready to be sent to the physician manually (fax, mail, deliver). Filter by delivery method, branch, date range and text. Sort by the following columns: Order #, client, type, physician, delivery method or order date.

To print and mark orders as sent:

1. Individual orders may be printed by selecting .
2. Multiple orders may be printed at once.
  - a. Select the  of orders to be printed.
  - b. Select **Bulk Print**.
  - c. The list of orders will be queued in *Reports/Completed Reports*.
3. Check the  of orders that were printed.
4. Select **Mark as Sent**.

Orders marked as sent to physician move to the Orders Pending Signature submenu (if the physician uses the Home Care web application). The order is also updated to a "Sent to Physician" status in the client chart. **NOTE:** If using Bulk Print, minimize the page until the user chooses to print the orders, then

open the page and select **Mark as Sent**. All the orders selected for the bulk print will still be checked.

## **ORDERS PENDING SIGNATURE**

*View/Orders Management/Orders Pending Signature*

Filter for orders by choosing the delivery method, branch (if more than one) and date range. Start typing to narrow down the list. Sort by the following columns: Order #, client, type, physician, delivery method, order date or sent date.

Receiving individual orders:

1. Select the **Receive Order** hyperlink.
2. Enter the received date.
3. Enter the physician signature date.
4. Select **Update**.

Receiving multiple orders:

1. Select  of orders to be signed.
2. Select the **Mark Selected as Received** button.
3. Confirm the received date (auto-generates today's date).
4. Confirm the physician signature date (auto-generates today's date).
5. Select **Mark as Received**.


Once an order is marked as received, it moves to the Order History screen. The order will also be updated in the client's chart to indicate "Returned w/ Physician Signature."

**NOTE:** The date range refers to the order date, not the sent date. This is important because most states require orders to be signed within 30 days of the order date, not the date sent. Please check your organization's state policies to ensure the user is tracking orders against the correct timeframe.

## **ORDERS HISTORY**

*View/Orders Management/Orders History*

Filter for orders by choosing the delivery method, branch (if more than one) and date range. Sort by the following columns: Order #, client, type, physician, delivery method, order date, sent date, received date and MD sign date. Make corrections by following these steps.

1. Select  icon.
2. Update sent, received and/or physician signature date(s) as desired.
3. Select **Update**.

## **ORDERS PENDING CO-SIGNATURE**

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

Filter for orders by choosing the branch (if more than one) and date range. Start typing to narrow down the list.

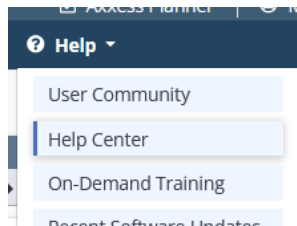
- **Client** - Hyperlink that navigates the user to the client's chart.
  - **Type** - Opens the order for review.
1. Select order **Type**.
  2. A PDF preview displays.
  3. Select **Co-Sign, Return, Download, Print, or Close**.
    - a. If **Return** is selected, a red return window displays.
      - i. Enter the return reason.
      - ii. Select **Return**.
    - b. If **Co-Sign** is selected, a confirmation box will appear.
      - i. Enter the clinician co-signature.
      - ii. Confirm the clinician's co-signature date (defaults to today).
      - iii. Select either **Co-Sign** or **Co-Sign and Approve** based on permissions and your organization's policy.
        1. If **Co-Sign** is selected, the order flows to the QA Center for approval.
        2. If **Co-Sign and Approve** is selected, the order bypasses the QA center and is approved.

**NOTE:** User permissions allow the organization to set up specific users to require co-signature on all orders.

## 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/>

