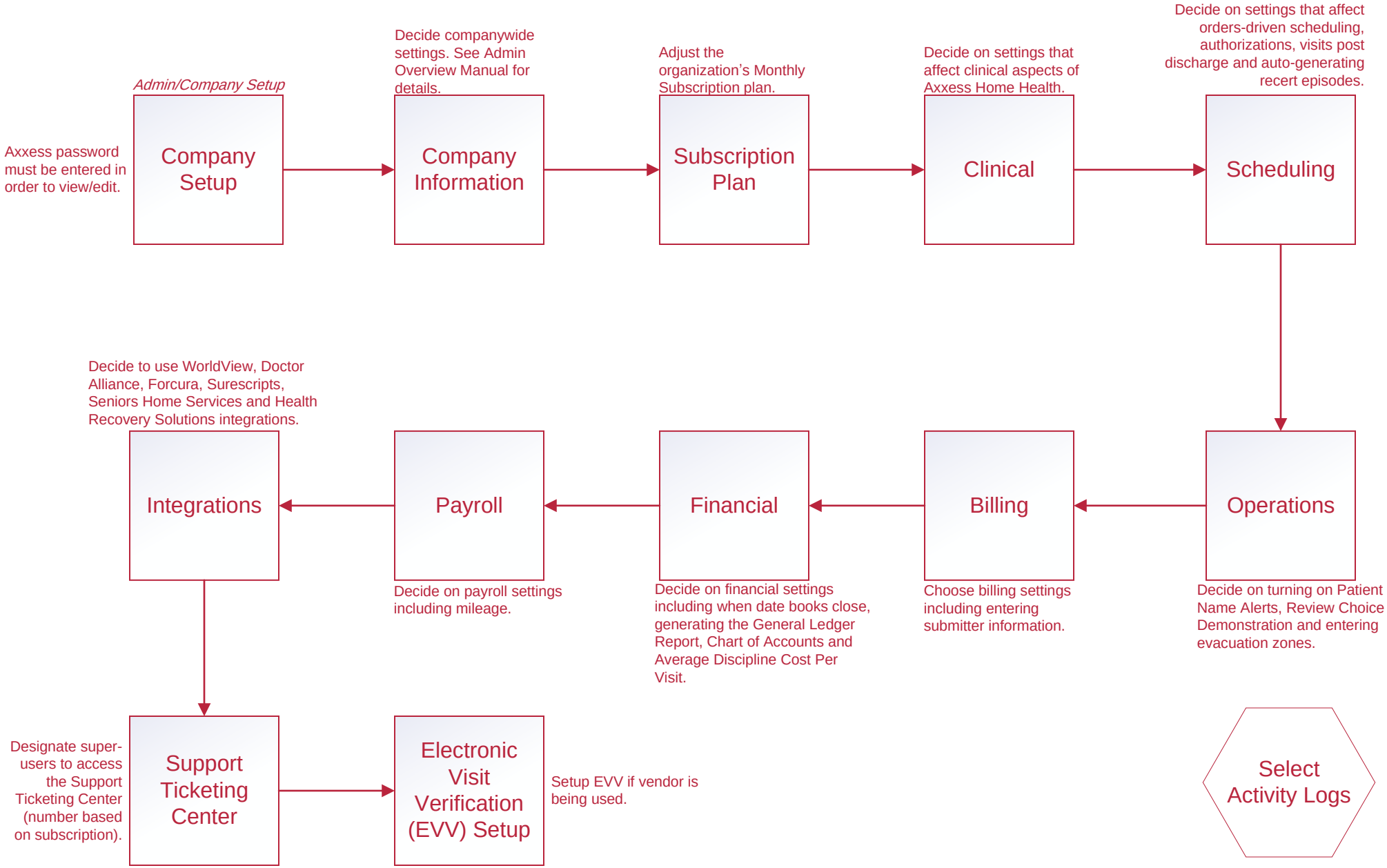
HOME HEALTH ADMINISTRATOR FLOW CHART

October 2022

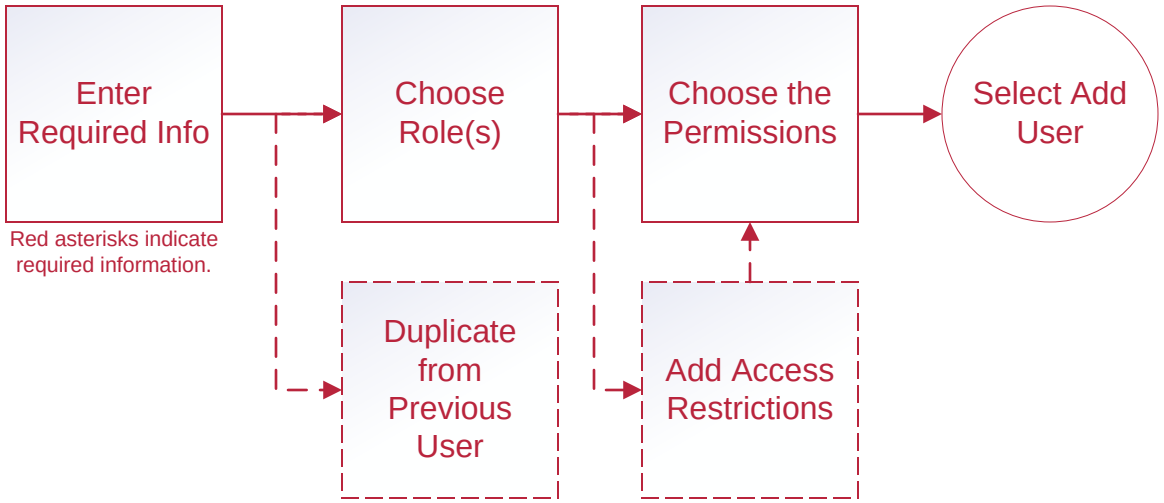
Company Setup



Users

Add New User

Admin/New/User



Red asterisks indicate required information.

Retrieving Deleted Users

Admin/Deleted Users

Check boxes to the left of user names then select the **Restore** button to restore multiple users at once.

Edit User

Admin/Lists/Users

Same as adding new user.

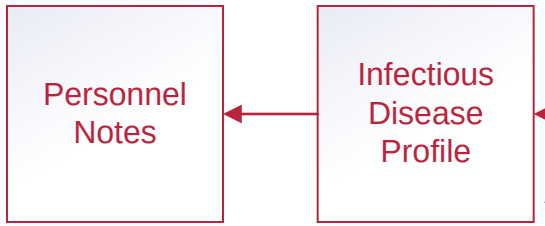
Add new, edit or delete.

Add new, edit or delete. Import rates from previous employee.

Add new, inactivate or delete.

To inactivate or remove users.

Add, edit, view/print, view history or remove personnel notes.



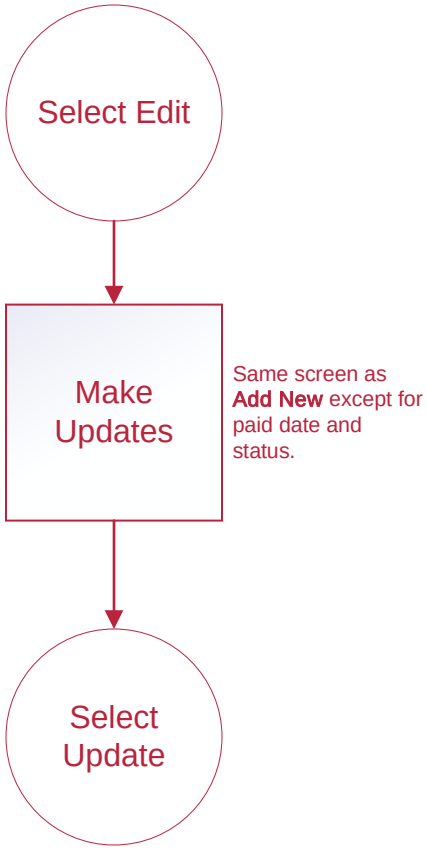
Add, view or remove COVID-19 screenings.

Activity Logs are only available in Edit user window.

Non-Visit Activity Manager

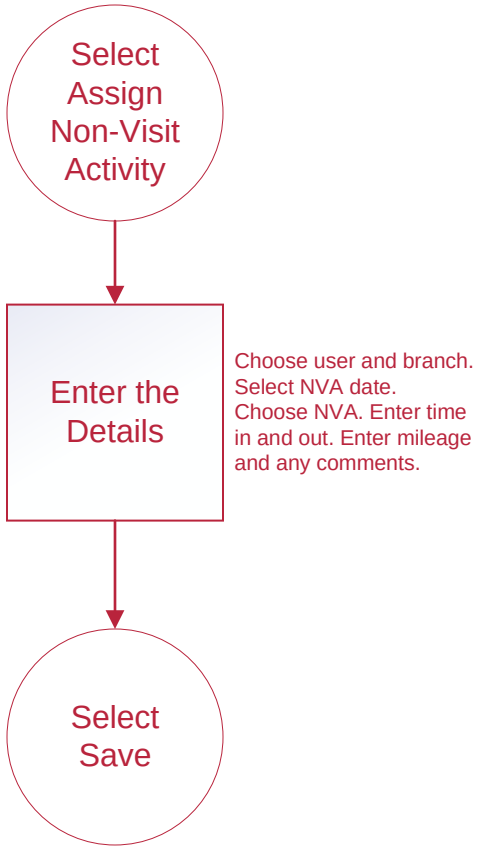
Edit Non-Visit Activity

Admin/Non-Visit Activity Manager



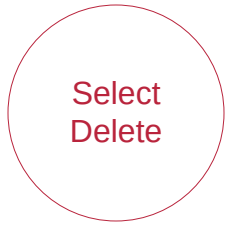
Assign New Non-Visit Activity

Admin/Non-Visit Activity Manager



Delete Non-Visit Activity

Admin/Non-Visit Activity Manager



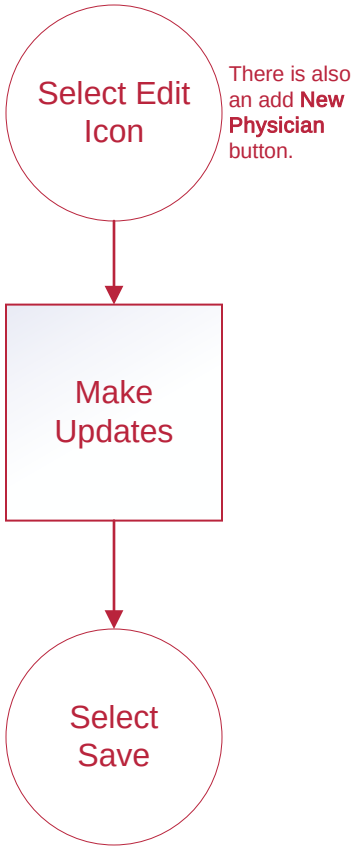
Shows which users have edited activity entries and when.

Physicians, Facilities and Pharmacies

Functionality works the same for physicians, facilities and pharmacies.

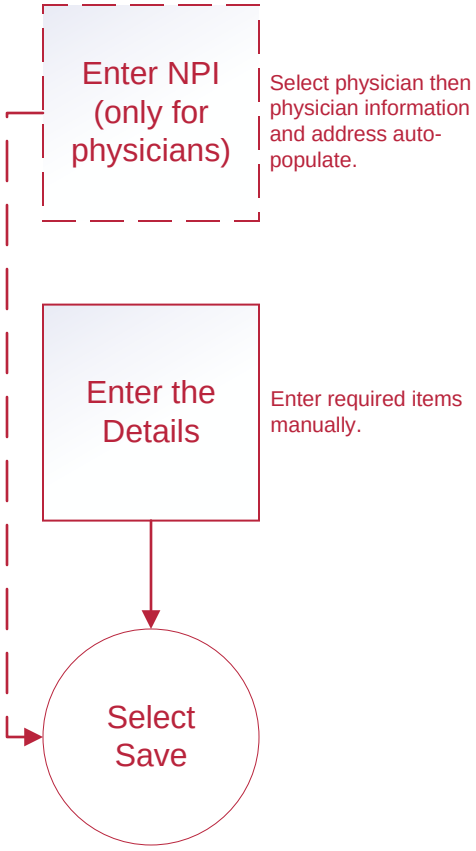
Edit Physicians*

Admin/Lists/Physicians



Add New Physicians

Admin/New/Physician

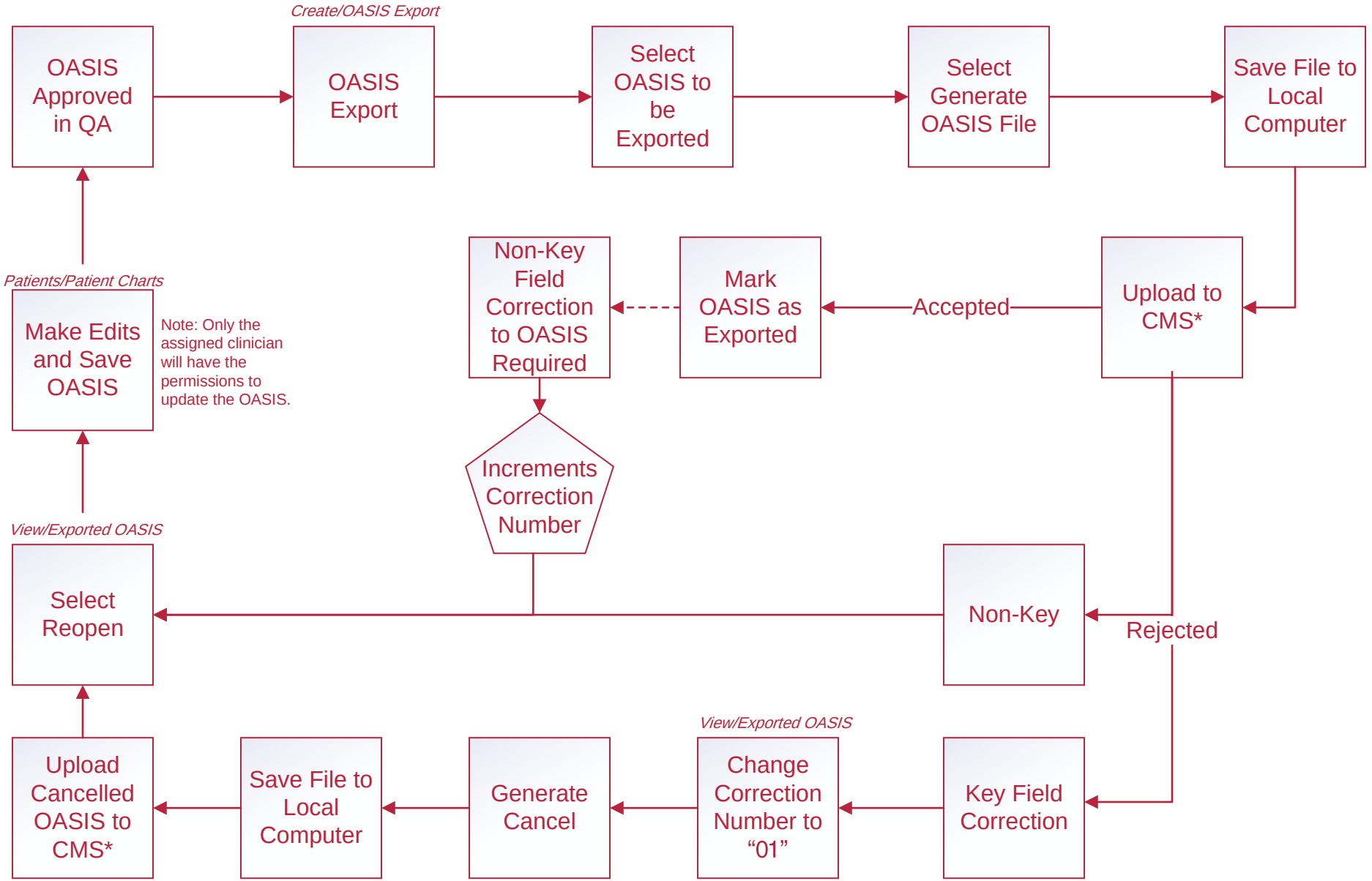


Remove Physicians

Admin/Lists/Physicians

Shows which users have edited activity entries and when.

OASIS Submission & Correction



*Steps are completed outside of Axxess Software

Orders Management[3]

[1]Delivery method must be Fax, Mail or Courier. [2]Delivery method must be Axxess Physician Portal or Electronic. [3]Order Notes can be added in all windows except Orders Pending Co-Signature by selecting the notes icon.

View/Orders Management/Orders Pending Co-Signature

Orders Pending Co-Signature

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

Select Order Type

A PDF preview of the order will appear where there is an option to Co-Sign, Print, or Close.

Enter Clinician Co-Signature

Also confirm Co-Signature date (autogenerates today's date).

Co-Sign

Co-Sign and Approve

QA Center for Approval

Order Approved

View/Orders Management/Orders To Be Sent

Orders To Be Sent

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

Send Manually[1]

Select the Print icon

Send[2] Electronically

Select/ Multi-select Checkboxes

Select Send

Orders Pending Signature

View/Orders Management/Orders Pending MD Signature

View/Orders Management/Orders History

Orders History

Shows order statuses. Corrections can be made to order Sent, Received or MD Sign Date by selecting Edit.

1. Update
2. Mark as Received

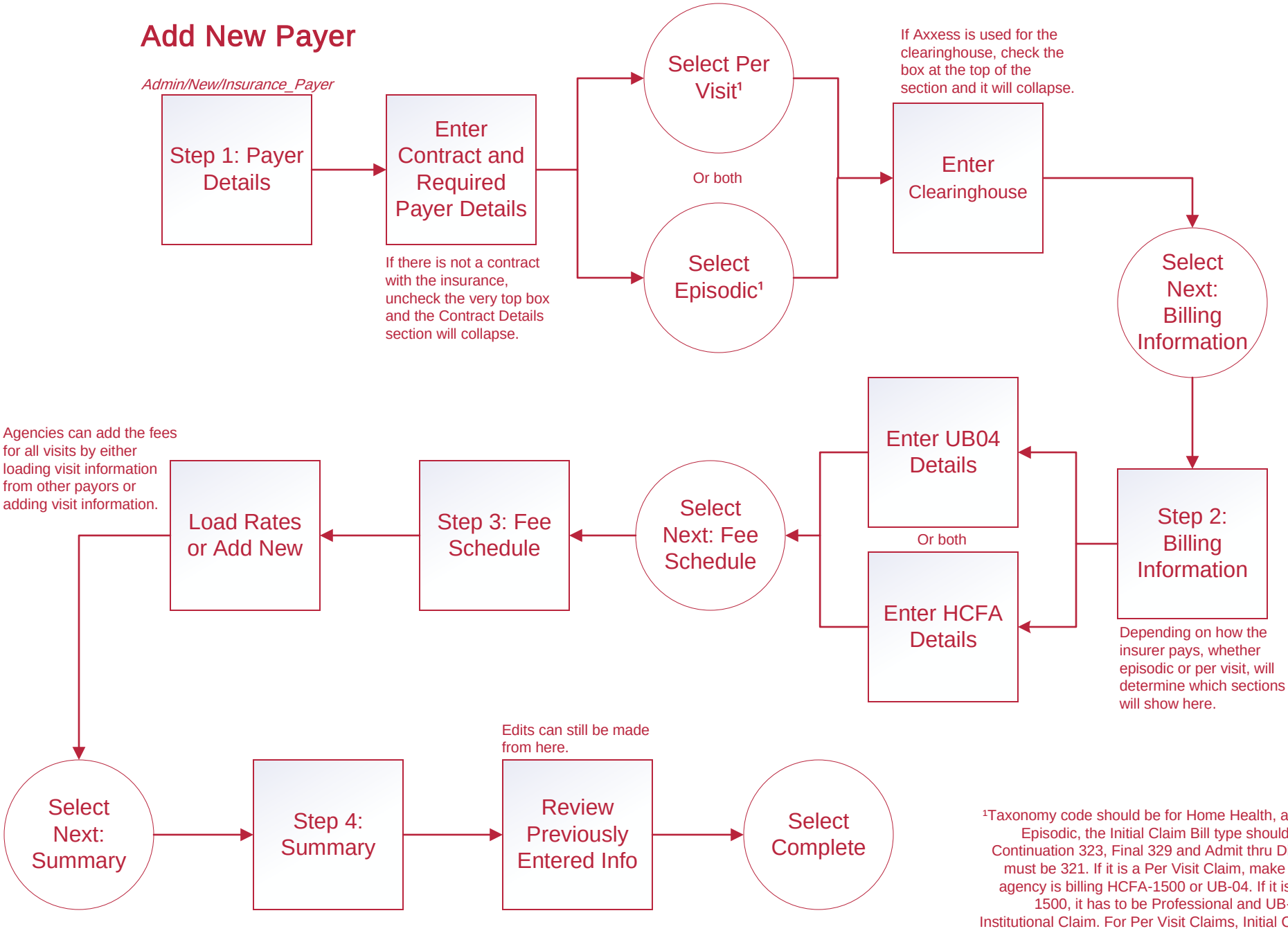
1. Update for receiving individual orders.
2. Mark as Received for multiple.

Receive Orders

Individual orders are received by selecting the hyperlink. Multiple orders use checkboxes and select Receive Orders button and new window opens.

Select/ Multi-select Checkboxes

Insurances/Payers

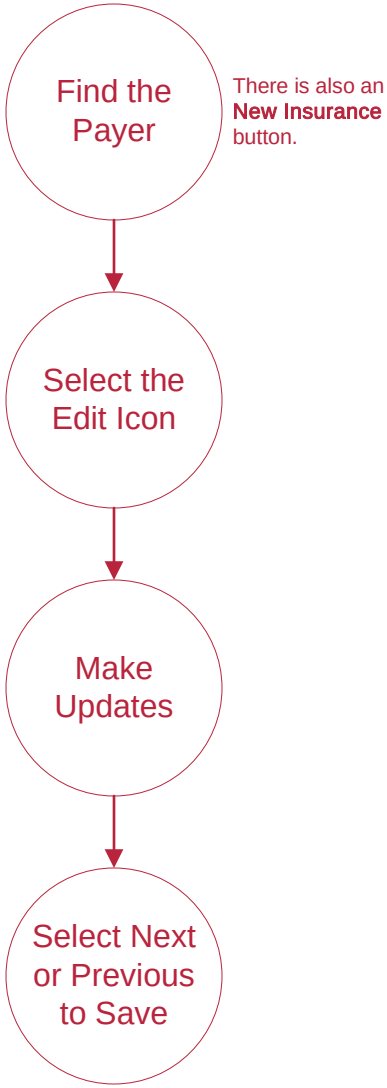


¹Taxonomy code should be for Home Health, and if it is Episodic, the Initial Claim Bill type should be 322, Continuation 323, Final 329 and Admit thru Discharge must be 321. If it is a Per Visit Claim, make sure the agency is billing HCFA-1500 or UB-04. If it is a HCF-1500, it has to be Professional and UB-04 is an Institutional Claim. For Per Visit Claims, Initial Claim Bill type should be 322, Continuation 323, Final 324 and Admit thru Discharge must be 321.

Insurances/Payers Continued

Edit Payer

Admin/Lists/Insurances_Payers

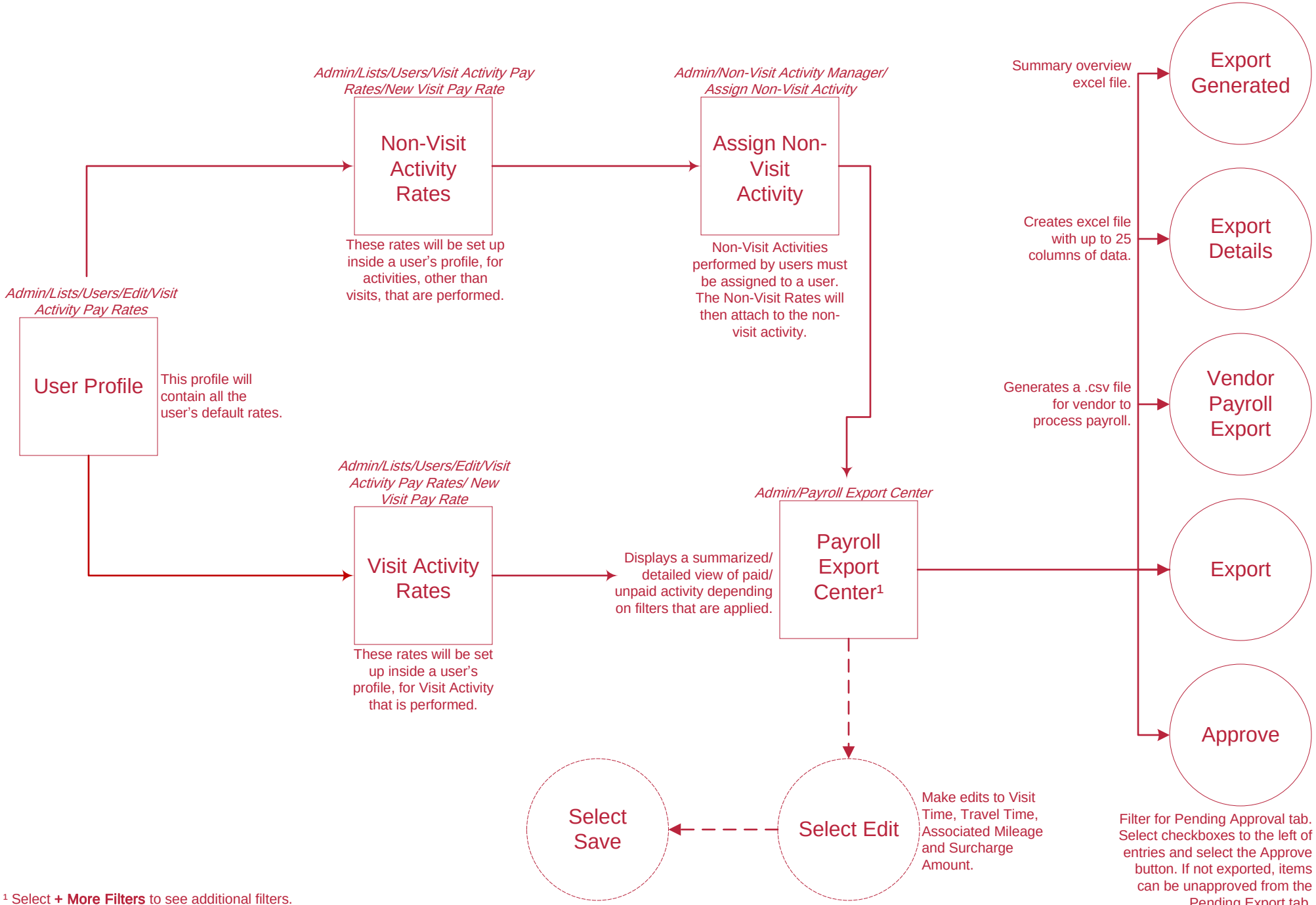


Remove Payer

Admin/Lists/Insurances_Payers

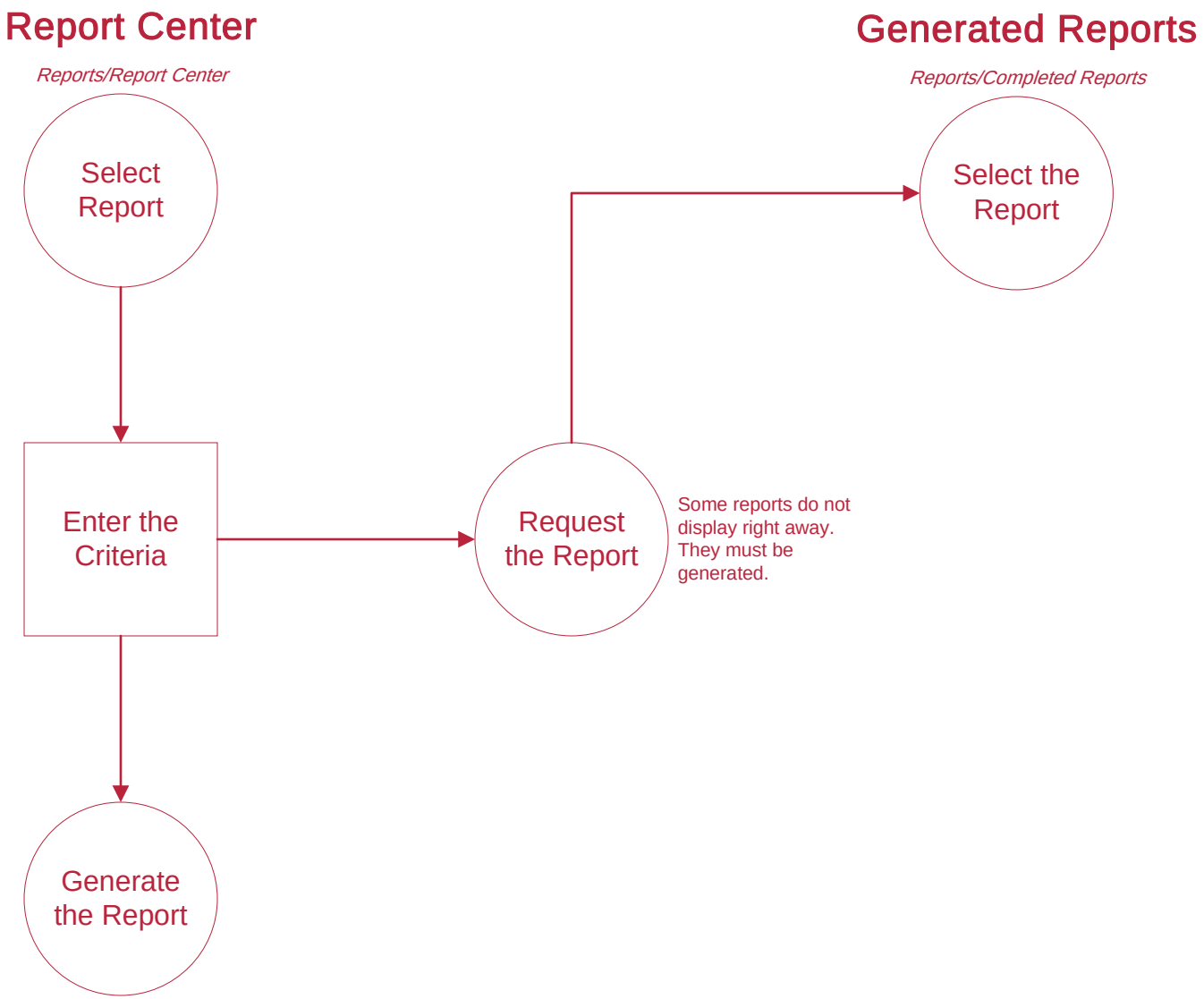
Under the Actions column select three-dot button. Shows which users have edited activity entries and when.

Payroll Export Center



[1] Select **+ More Filters** to see additional filters. Additional Columns menu enables users to generate (multi-select) more robust payroll data.

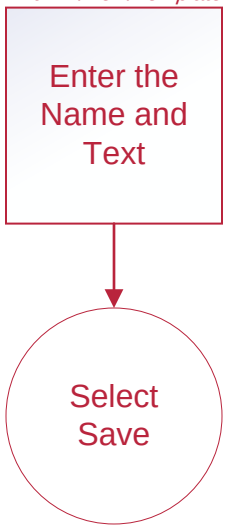
Reports


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

Templates

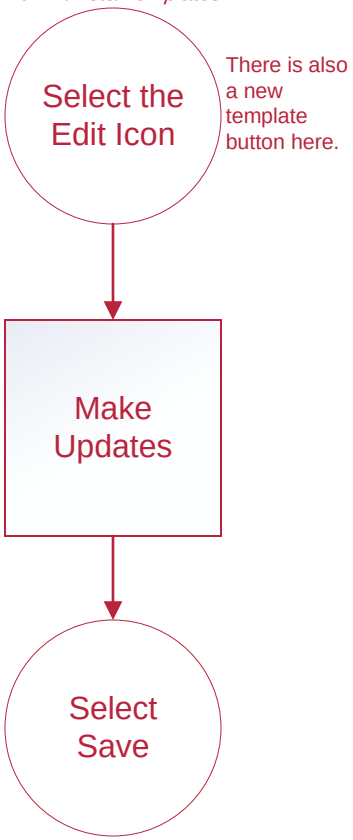
Add New Template

Admin/New/Template



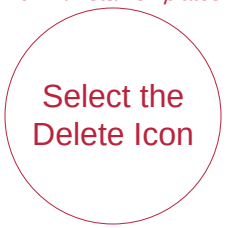
Edit Template

Admin/Lists/Templates



Remove Template

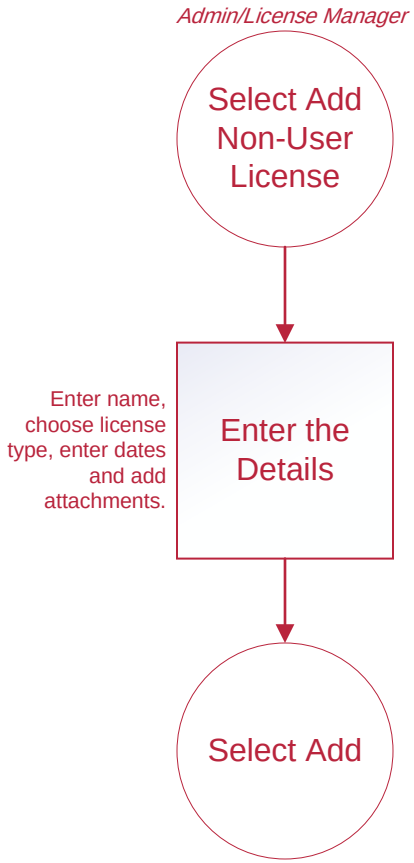
Admin/Lists/Templates



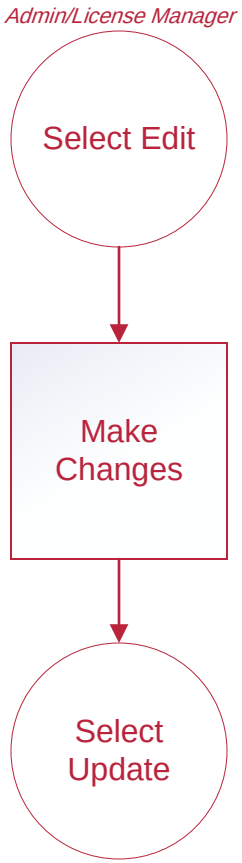
Shows which users have edited activity entries and when.

License Manager

Add Non-User License



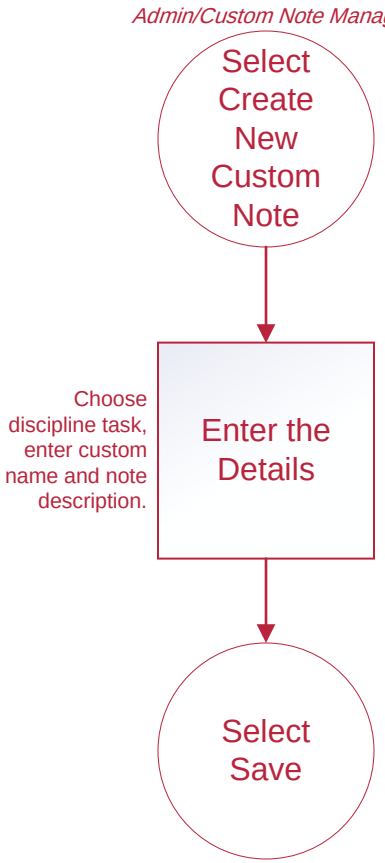
Edit License



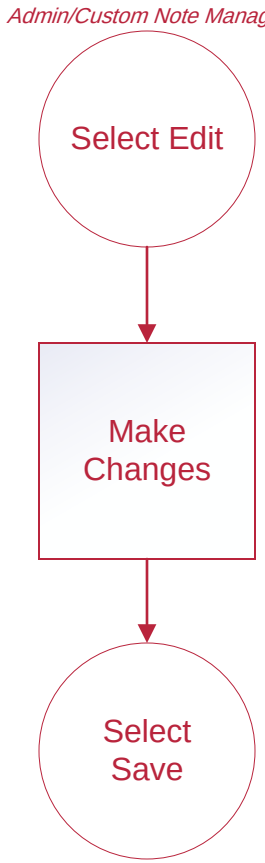
Remove License

Custom Note Manager

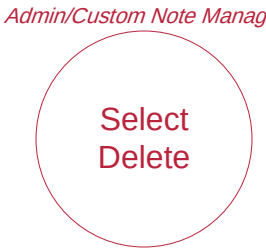
Create New Custom Note



Edit Custom Note

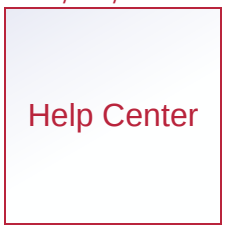


Remove Custom Note



Help Center Process

Help/Help Center



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