HOME HEALTH OVERVIEW QUICK REFERENCE GUIDE

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/Axxess

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LOGIN TO AXXESS

1. Go to www.axxess.com and select **LOGIN**.
2. Enter in the email address and password.
3. Select **Secure Login.**
4. Select **OK.**

AXXESS PLANNER

The Axxess Planner displays pertinent information specific to a user.

- Clinicians are also able to see upcoming visits, past due visits, unread messages and a map of today's visits.
- Select the appropriate Axxess Home Health application.

Navigation Menu

Once logged in, the navigation menu at the top will allow for easy access throughout the system.

Home

The Home menu allows access to the following actions based on permissions granted to the user.

- PDGM - View the PDGM Center, Modeling Tool, Resource Center and/or Revenue Impact Analysis.
- My Account - Quickly edit the user's profile, reset their signature or switch to different Axxess applications.
- My Dashboard - Opens the Axxess Home Health dashboard.
- My Messages - Opens the Message Center to view/send messages.
- My Schedule/Tasks - View the user's schedule/tasks in a list view.
- My Monthly Calendar - View the user's schedule/tasks in a monthly calendar view.
- My Pending Co-Signature Notes - Sign notes that are marked to require a co-signature.
- Quality Assurance (QA) Center - View tasks that are pending approval by the QA nurse/employee.
- Alert Center - Organizations can start exchanging health information here once the Surescripts Clinical Direct Messaging integration is active.
- EVV Exception Center - Manage, correct and resubmit EVV exceptions.

Create

The Create menu allows access to the following actions based on permissions granted to the user.

- <u>New</u> - Add new items into the system, such as a Referral, Physician, and Communication Notes.
- <u>OASIS Export</u> - View OASIS assessments that are ready to be exported and submitted to CMS.

View

The View menu allows access to the following actions based on permissions granted to the user.

- <u>Lists</u> - View items in the system, such as a list of referrals, patients, physicians and insurances/payers.
- <u>Blank Forms</u> - View blank versions of visits to be printed and filled out manually.
- <u>Archived Insurances</u> - View insurances that have been archived (no longer in use).
- <u>Exported OASIS</u> - Review, cancel any previously exported OASIS or edit correction numbers.
- <u>Not Exported OASIS</u> - View OASIS that were not exported from the system.
- <u>Past Due Recerts</u> - View patients that have a recertification past their due date.
- <u>Upcoming Recerts</u> - Review patients that have an upcoming recertification date within the next 30 days.
- <u>Orders Management</u> - View orders that are pending co-signature, pending physician signature, orders to be sent and orders history.
- <u>Print Queue</u> - Displays tasks that are ready to be printed and delivered to the appropriate recipient.

Patients

The Patients menu allows access to the following actions based on permissions granted to the user.

- <u>Referrals</u> - View a list of pending referrals and begin the admission process.

- Patient Charts - View patient charts within the system, including active, pending, discharged and non-admitted patients.
- Pending Admissions - View and add a new patient for admission into the system.
- Non-Admissions - Inclusive list of all non-admissions logged in the system. From this screen, a user can also admit a patient if they were marked incorrectly.
- Deleted Patients - Patients that have been deleted from the system are visible in this screen and are able to be restored.
- Hospitalization History - Patients that have been transferred to the hospital by completing a Transfer OASIS are visible in this screen for tracking purposes.
- Inpatient Facility and Hold List - Patients with completed transferred assessments or OASIS transfer discharge assessments who have been transferred to an inpatient facility and patients manually placed on hold through the **Change Status** button in the patient's chart.
- Pre-Claim Review Center - Enables organizations to collect and track their PCR submission documents efficiently and seamlessly.

Schedule

The Schedule menu allows access to the following actions based on permissions granted to the user.

- My Schedule/Tasks - View the user's schedule/tasks in a list view.
- My Pending Co-Signature Notes - Notes that require a co-signature will be listed in this section until signed by the responsible co-signer.
- Schedule Unassigned Visits - View all episodes with ordered visits that have not been fulfilled and schedule/fulfill all frequency orders.
- Schedule Center - Review a patient's schedule, as well as completed visits and miscellaneous episode information.
- Reassign Schedule - Reassign an employee's schedule to another employee for a specified date range.
- Unscheduled Visits Report - Alerts organizations to assign and schedule visits according to the ordered visit frequency.
- Schedule Report - Generate a schedule report by Status, Discipline, Clinician or Patient.
- Schedule Deviation Report - This report displays visits that were completed outside of the originally scheduled date.

Axxess CARE

The Axxess CARE menu allows access to the following actions based on permissions granted to the user.

- Axxess CARE Scheduler - Post multiple visits to Axxess CARE that require coverage.
- Posted Visits Summary - Review the visits that have been posted to Axxess CARE, along with their current visit status and assigned clinician.

Billing

The Billing menu allows access to the following actions based on permissions granted to the user.

- Axxess DDE - If the organization has access to Axxess DDE applications can be switched here.
- DDE Black Screen - Opens a new browser tab to access to DDE Black Screen.
- Billing Center - Enables users to manage all billing processes in a central location and streamline operations to ensure timely claim submissions.
- Pending Claims - Provides a centralized location for managing all Medicare and Managed Care claims that have outstanding balances.
- Medicare/Medicare HMO (PPS) - This menu provides the options to create claims, view claims history and review eligibility for Medicare/Medicare HMO clients.
- Managed Care/Other Insurances - This menu provides the options to create claims and review claims history for Managed Care/Other Insurances.
- All Claims - Central location to review claims regardless of insurance or bill type.
- Claim Submission History - Review submitted claims and the associated responses by Batch ID.
- Remittance Advice - Review notices of remittance and electronic fund transfers.

People

The People menu allows access to the following actions based on permissions granted to the user.

- Payroll Export Center **-** Enables users to generate robust payroll reporting, export ADP (.csv) and Paychex (.txt) vendor files and streamline payroll processing and operations.
- Users - Users can search, add, edit, deactivate, delete and export all of the organization's users.

Admin

The Admin menu allows access to the following actions based on permissions granted to the user.

- New - Add new items into the system, such as a referral, facility, pharmacy and insurance/payer.
- Lists - View items in the system, such as a list of referrals, patients, physicians and insurances/payers.
- Deleted Users - Users that have been deleted from the system will appear in this screen for historical purposes. These users may also be restored from within this screen.
- Payroll Export Center - Enables users to generate robust payroll reporting, export ADP (.csv) and Paychex (.txt) vendor files and streamline payroll processing and operations.
- Accelerated Payment Center - Provides forms, resources, and information to help organizations apply for accelerated payment.
- Non-Visit Activity Manager - Central entry point for non-visit activity as well as the ability to mark as paid.
- License Manager - Central location to review all licenses entered in the system, as well as the ability to "Add Non-User License".
- Custom Note Manager - Custom notes created from a system-generated note are on this screen, allowing the ability to rename notes.
- Company Setup - Company-wide settings and information are managed from this screen. **NOTE**: An administrator's signature is required to access this screen.

Reports

The Reports menu allows access to the following actions based on permissions granted to the user.

- Report Center - Provides access to reports available in the system.
- Completed Reports - Some reports will be queued until compiled. Once the data has been compiled, the report will be available from this section.

- EVV Exception Center - Manage, correct and resubmit EVV exceptions.

Help

The Help menu allows access to the following actions based on permissions granted to the user.

- User Community - A link for Axxess users to engage with others to share their knowledge and learn together.
- Help Center - Get answers to frequently asked questions and watch tutorial videos on all the Axxess products.
- On-Demand Training - Watch Axxess Home Health training videos on demand.
- Recent Software Updates - Sends users to the Help Center area that shows the latest Axxess Home Health software updates.
- COVID-19 Resource Center - A direct link to the Axxess COVID-19 Resource Center, which includes Best Practices, Hear from Experts, Helpful Downloads, PPE and Helpful Links.
- Follow Axxess - Direct links to Axxess' Facebook and LinkedIn pages.

RESET SIGNATURE

Home/My Account/Reset Signature.

1. Select **Reset Signature**.
2. Review the system-generated email that was sent to the user's email address for a personalized link.
3. Web browser window will open prompting to verify the information and enter a new signature.
4. Select **Change Signature**.
5. Close browser and log back into Axxess to use the updated signature.

RESET LOGIN PASSWORD

To reset the Axxess login password, follow one of the methods listed below.

Current Login Password is Unknown

1. Navigate to the login page and select **Having trouble logging in?**
2. Enter the email address used to log in to Axxess.
3. Select **Send**.
4. This will send a password reset link to the user's email address.

Current Login Password is Known
Home/My Account/Edit Profile.

1. Input the current password, new password and confirm new password desired in the boxes provided.
2. Select **Save**.

HELP CENTER
A great resource available any time, any day is our Help Center. Get answers to frequently asked questions and watch tutorial videos on all our Axxess products. Our Help Center can be accessed by going to *Help/Help Center* or https://www.axxess.com/help/