AXXESS CARE
MOBILE ANDROID
TRAINING MANUAL
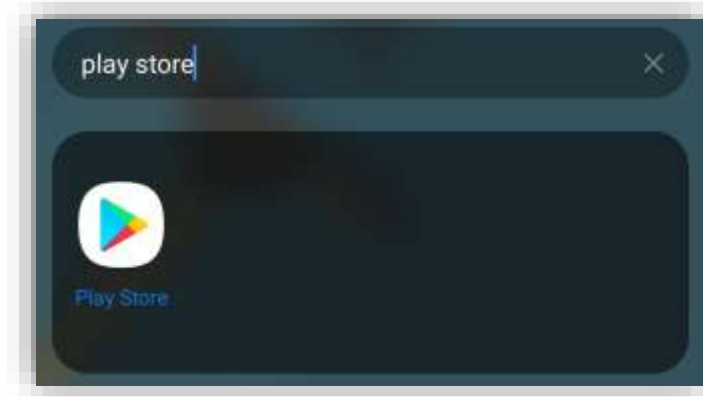### November 2022

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DOWNLOADING APP

Go to the Google Play Store.

Select the search bar at the top of the page.
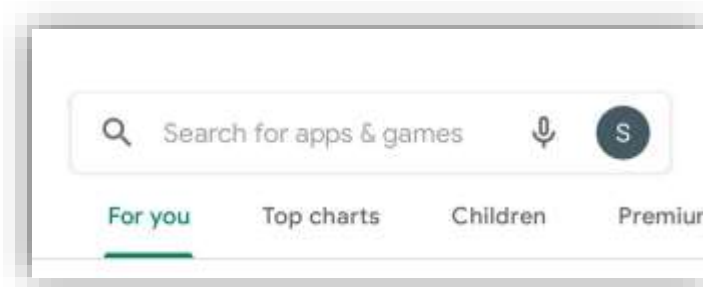
Search for AxxessCARE. The app is teal and has the Axxess logo (heart and key).
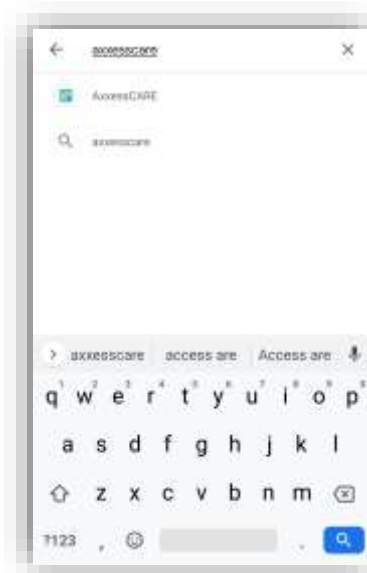
Select **Install**.
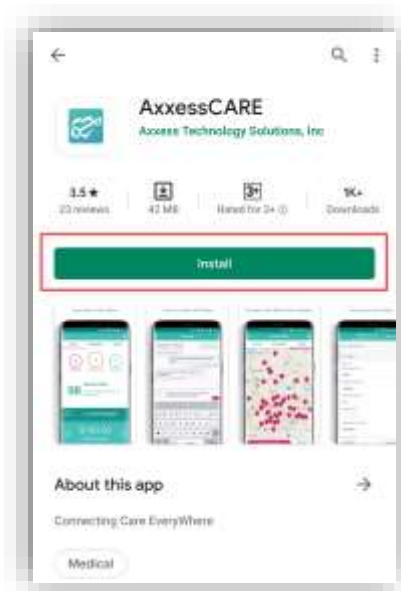
The app will begin downloading.
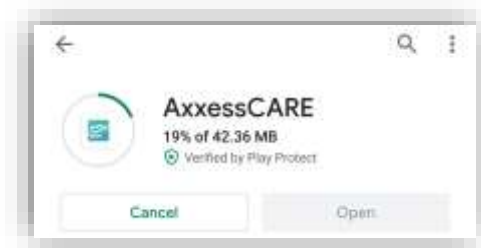
Once the app has downloaded, there will be an option to uninstall. Select **Open**.

NOTE: The app will be located with the rest of the user's apps. Always download the latest update from the Play Store for free.

Select the teal **Login** button. The version number of the app will be listed at the bottom.

Select **ALLOW** for Axxess to access the device's location. Allowing this feature is critical for the app to be able to pinpoint locations accurately for Electronic Visit Verification (EVV), which will be covered later.
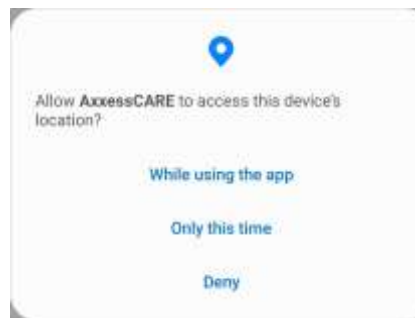

To utilize Axxess CARE, a clinician must sign up using an active Axxess account. Enter the email that was provided to the organization and the established password while logging into the desktop version of Axxess Home Health. If the password was forgotten, tap the **Having trouble logging in?** hyperlink. Enter the associated email address and select **Next**. Then enter the password and select **Secure Login**.
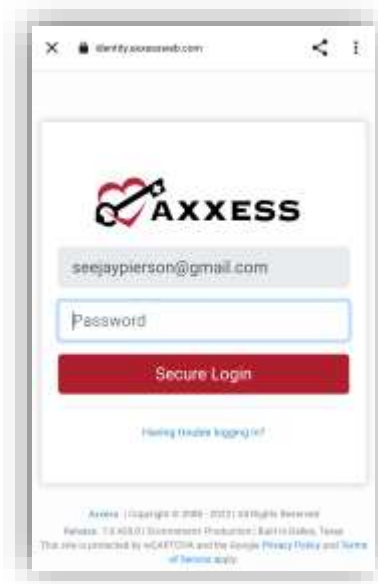
New Account/Sign Up

Select the Next button after selecting the **Sign up** hyperlink from the login page.
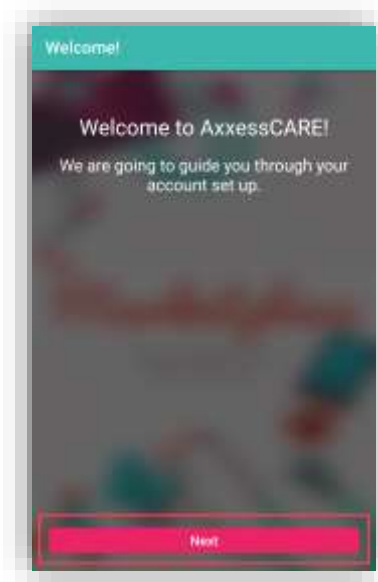
Setting up a new account is done in three steps:
1. Basic Information – Enter the name, DOB, address and mobile number, then select **Next**.
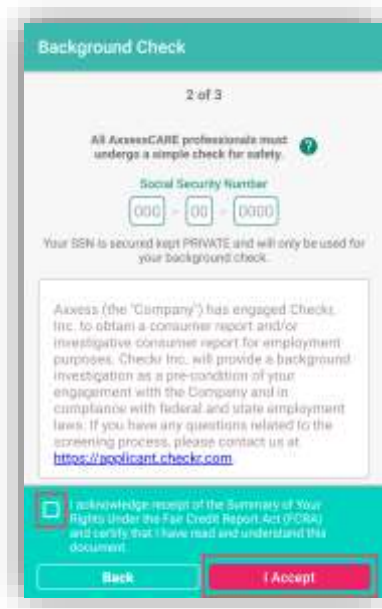
After entering basic information, the Nearby Opportunities screen will display what visits are available in the area. The day, date and type of visit are listed. Below is the organization the patient belongs to, followed by the pay rate and how far the visit is based off the device's GPS. Select **Continue** to finish the sign-up process.

2. <u>Background Check</u> – Enter the user's SSN, select the FCRA acknowledgement receipt checkbox, then select **I Accept**.
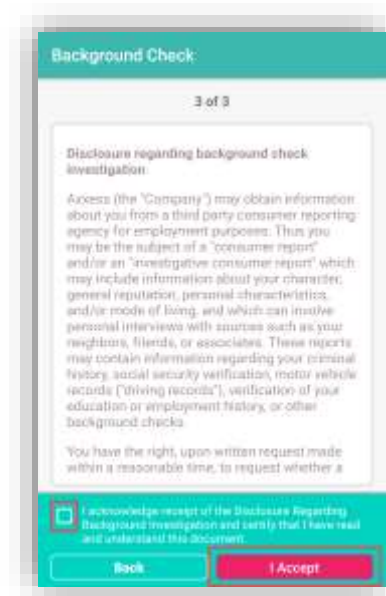
Another Background Check screen will show more information. Select the Fair Credit Report Act (FCRA) acknowledgment receipt checkbox, then select **I Accept**.

3. Disclosure – Read the Disclosure Regarding Background Investigation. Select the acknowledgment receipt checkbox. Then the user will enter their first name and last name that serves as their Electronic Signature. Then select the **I Accept** button.

NOTE: The Electronic Signature must match the first and last name chosen during step one of the sign-up processes.

A video will show the Axxess CARE product. Select **DONE** in the top-right to continue.

After setting up a new account, the following prompt will ask the user to enter a four-digit code.

Once a four-digit passcode has been entered, confirm the passcode by entering it one more time. Any time users leave the app and come back, or the app times out due to inactivity, the passcode must be reentered.

NOTE: After five incorrect attempts, the user will be prompted to log back into the app and create a new pin.

If a new user is being created, the profile set up is still not finished. The following window will instruct the user to review and sign vaccination forms before applying for visits. Select **COMPLETE NOW** to go to the User Profile.

The orange warning will appear until the background check is complete.

HOME

The following is the Axxess CARE Home screen. To refresh the screen, select the refresh ⟳ icon. See any visits that are **Past Due**, **QA Returned** and/or **Scheduled** (more details later).

Select the **Axxess Certification** button to access the user's Axxess Certification Program. If the user has been assigned courses in the program, the button will open the certification dashboard where users can view and complete assigned courses.

Routing Optimization

To route daily visits on Axxess CARE, select **Route Visits**. The routing overview displays the date of routing, number of visits, number of visit locations, total travel time and total distance.
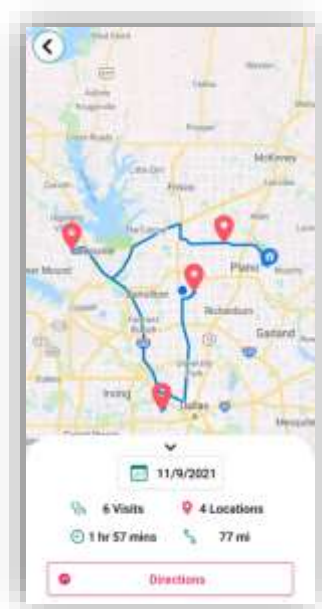
Any date with a scheduled visit can be routed from the current location to the scheduled visits, then ending at home. To route visits, select the desired date and select **FIND VISIT ROUTE.**
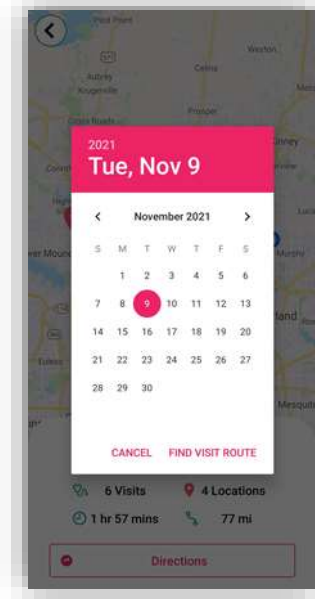
Each stop in the route is marked with a pin that provides visit details for that stop.

For locations with multiple visits, users can view all the visits at the location.
Users can adjust the route order to accommodate visits with a scheduled time.
Select **Directions** for turn-by-turn directions to each visit along the route.
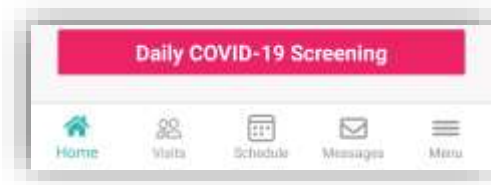
Below is a direct link to clinician daily COVID-19 screenings.

NAVIGATION BAR
Messages

The Message center is split up into three tabs: **All Messages**, **Alerts** and **Deleted**. The selected tab will be highlighted in pink. The number in parentheses to the right of the tab indicates how many new items there are in that tab. Use the search bar to narrow down the list in each tab.

Messages are tied to previous, current and future visits. The visit date is listed to the left. The visit type is at the top, followed by the visit date (unread will show in pink text). For unread messages, the date to the left is highlighted teal. Messages that have been read are light gray. Messages returned from QA will show as orange. Select a message to view it.

The visit information will be listed at the top. The messaging exchange is shown below. Messages from the organization appear on the left side of the page, citing the date and time they were sent. QA returned notes will be listed in orange

(more on QA process later). Messages sent by the user will be on the right side. To write a message, type in the free text space at the bottom of the page, then select the **Send** button.

Select the paper icon to, **Take Photo**, **Choose Photo** or **Choose file**. Select the back arrow in the top left when done messaging or viewing to get back to the Message center.
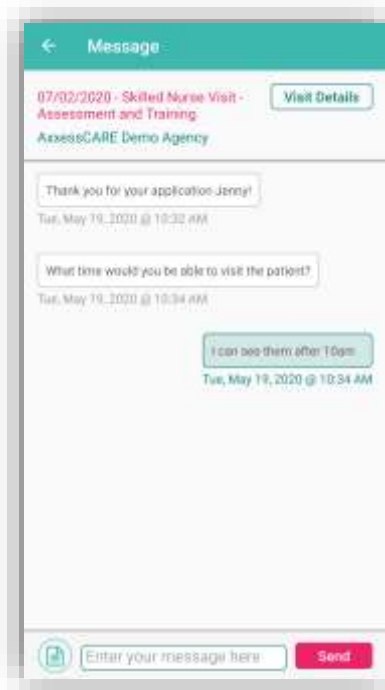
Select the **EDIT** option in the top right to remove one or more messages. Check boxes will appear to the left of the messages, where one or more may be selected. Select **Select All** in the top right to automatically check all messages.

The number of messages that are selected will show in the top left. Select the icon when ready to delete it. Select **Done** in the top right when finished deleting visits. Removed messages will now be in the **Deleted** tab.

Schedule

The following is the **Schedule** tab. It shows a rolling calendar of past and upcoming days. If there is a visit on a day, the date number on the left will be pink. Select the month.

This will show the calendar in a monthly view. The number of the current day will be in pink text. To collapse the monthly view, either select the upward-facing arrow or swipe up on the list calendar.

Visits

The **Visits** tab shows available visits for application. It lists the day, date, type of visit, organization, pay rate and how far away the visit is.

The list can also be shown in map view by selecting the **View as Map** button. The number in parentheses shows how many visits are currently available in the area.

A icon will list available visits. Select the pin to view details about the visit. It will list the type of visit, organization, date and rate. If there is more than one visit available at the same location, there will be an orange circle icon with the number of visits available. Select the next button to look through all visits. Another way to search through available visits is by selecting the **Filters** button in the bottom right.
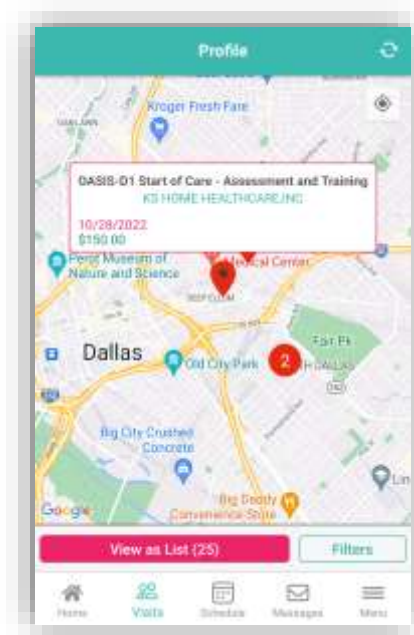
The three tabs inside the filter are **All, Not Applied** and **Applied**. The tab being viewed is highlighted in pink. Search by Location by typing an address in the text space or selecting the 🏠 icon, which will enter the address of the current location. Enter a date range by either typing it in or selecting the calendar icon and choosing the date range. Decide the minimum acceptable pay range for a visit by dragging the pink dot along the line.
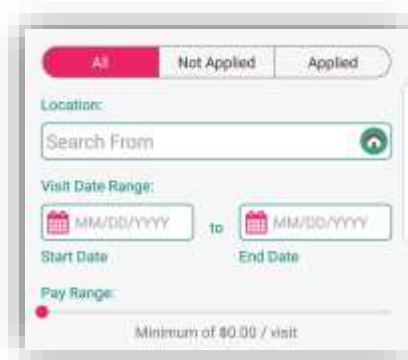
In the bottom half of the page, view visits that are external or internal by checking the boxes. Internal visits are visits from the user's parent organization. Use the pink dot on the pink line to determine how wide (in miles) the search for visits should be. Select the **Skills Competencies** button to select all applicable competencies, i.e., IV, CHF or COPD Management, etc. Then select **OK** in the bottom right to return. After selecting the filters, select the **Apply Filters** button or **Reset Filters** to set back to the default parameters.
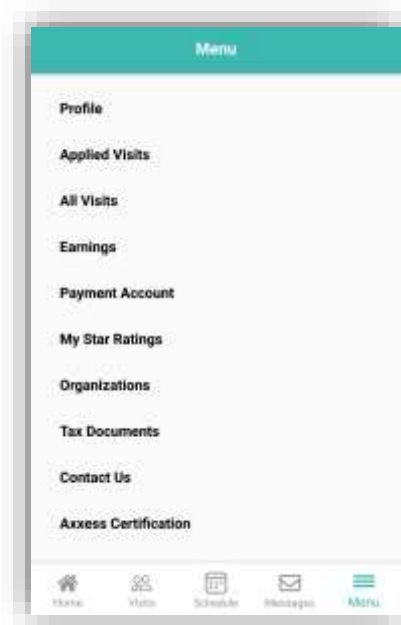
Search for specific posted visits by visit type, visit task, organization name, city, state, ZIP or day of the week. Visits that are posted from the user's primary organization and are only available to the staff members of that organization will show the following purple icon:

MENU

Select the Menu tab to see the side menu. It has the following options:

Profile

Select **Profile** to view the personal clinician's profile. The profile editing screen reviews the 11-step process of setting up the profile. They are:

1. Basic Information
2. Privacy Settings
3. Credentials
4. Skills Assessment
5. Immunization
6. Availability
7. Bio
8. Training/CEU
9. Payment Account
10. Tax Documents
11. Infectious Disease Profile

Go back and make edits by selecting each step. The steps will show the green check mark ✅ icon when complete. Select the back arrow ⬅ to return to the profile.
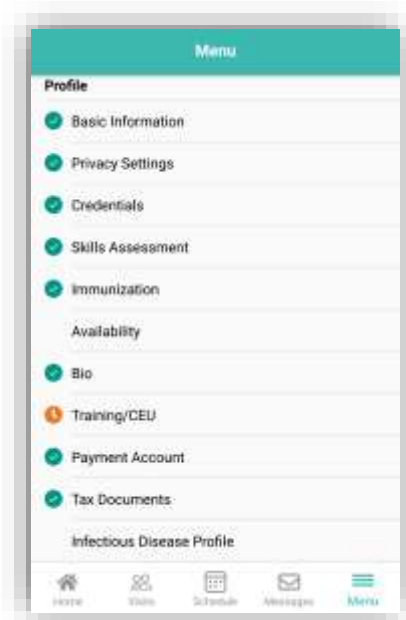

Select the **Bio** button from the profile. Users enter their experience in the healthcare industry in the free text space. A profile photo and resume can also be uploaded. The next two steps are setting up payments, which will be explained later in the manual.
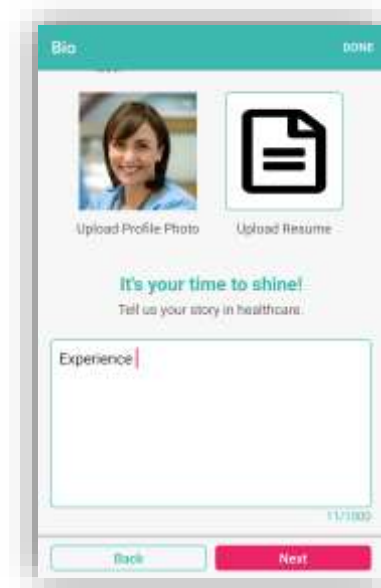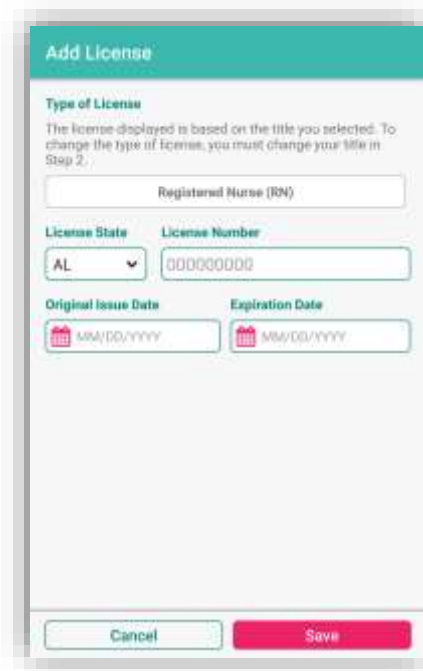
From the profile, select **Credentials**.
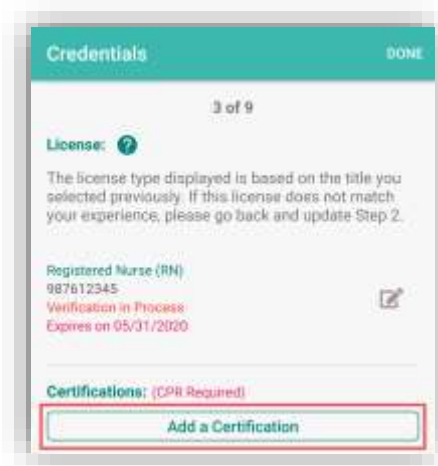
Credentials

The page will list licenses and certifications. Select the **Add License Details** button to enter license details.
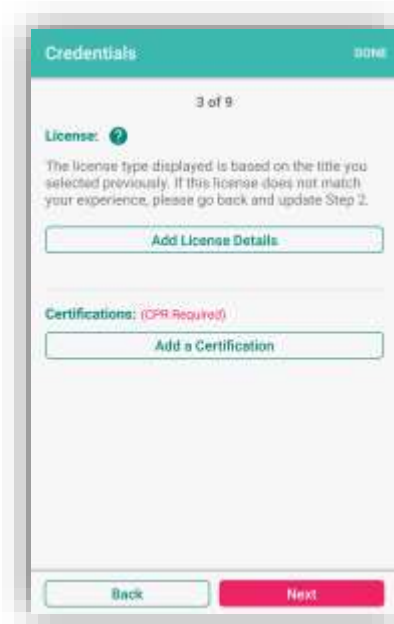

The license displayed is based on the title selected. To change the type of license, users must change the title in Step 2. Choose the license state, number, issue date and expiration date. Then select the **Save** button.

The license will be listed as "Verification in Process" after initially being added. Once completed the license will show as "Verified." To edit a license, select the

 icon. Select the **Add a Certification** button.

Select the drop-down menu below Type of Certification to find a certification and enter an expiration date. Select **Tap to Add** to add a photo. Users can decide to **Take Photo** or **Choose Photo** from the device. Users must then **ALLOW** Axxess CARE to access photos on the device.
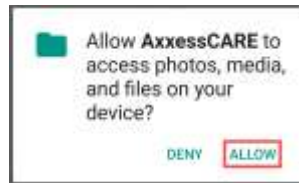
Once photos have been added, select the ⊗ icon to remove and reattach or retake a photo. Select **Save** when complete.
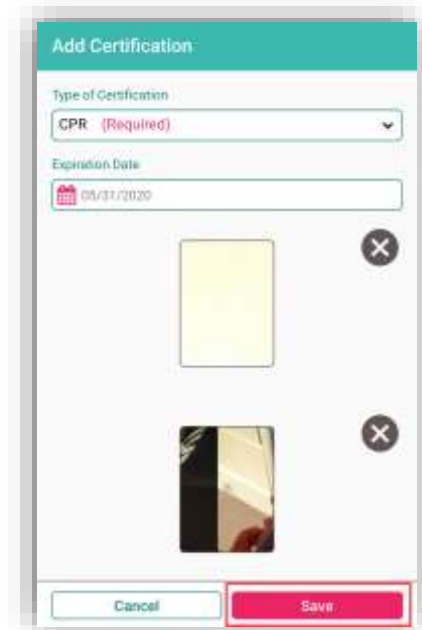
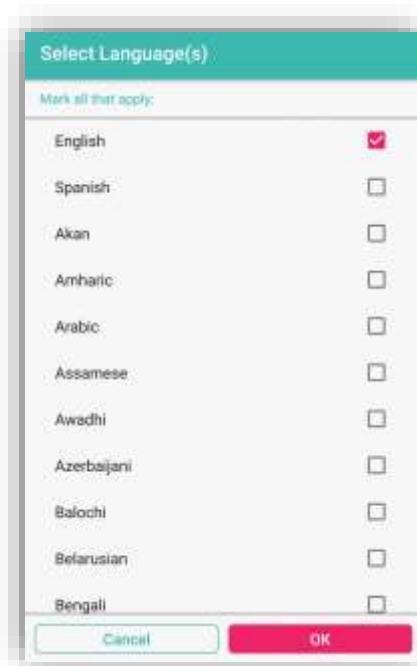NOTE: Adding the CPR Certification is required.

Skills Assessment

Select **Skills Assessment** from the profile edit view. The language chosen in the clinician setup in Axxess Home Health web application will be shown here.
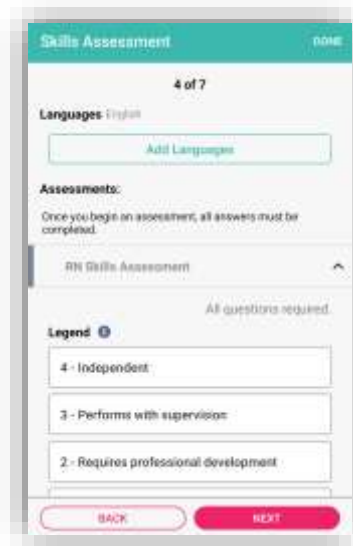Others can be added by selecting **Add Languages**.

Select as many languages as applicable by selecting the checkboxes. To finish select **OK**.

Clinicians must document their skills in the Skills Assessment. Select the down arrow to expand the list of questions.
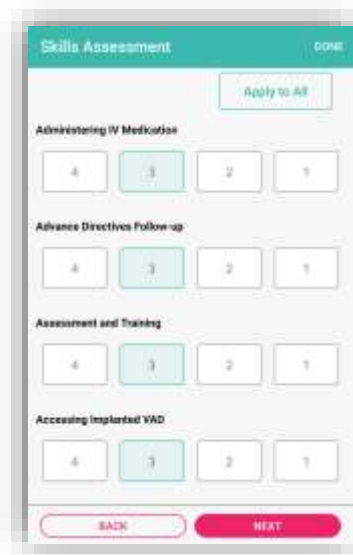
Select the skill level for each category of care between (4) Independent, (3) Performs with supervision, (2) Requires professional development and (1) Prefers not to perform. To save time, clinicians can select one of the skill levels and then select the **Apply to All** button to set that skill level for every skill listed.
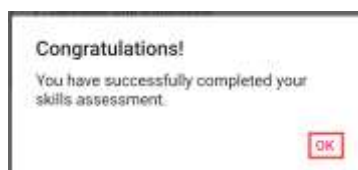
Once all skills have been given a number, select the **NEXT** button. The following confirmation will show once the assessment is completed. Select **OK** to continue.

Availability

Select **Availability** from the profile edit view to indicate what days the clinician is available. Once **Availability** is selected, the monthly calendar will show.

To change the days available to pick up visits, edit by date. Once the date is selected, select **Not Available** or **Available**.

Once the availability is selected, select the time range that the user is available. If available multiple times that day, select the plus sign to add another time range. Select the minus sign to remove a time range.
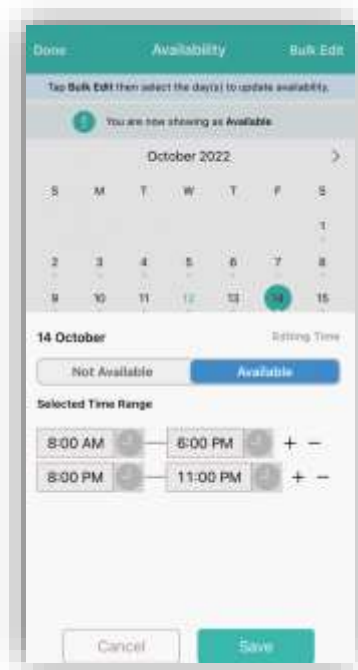
To edit the availability of multiple days, select **Bulk Edit** in the top-right hand corner.

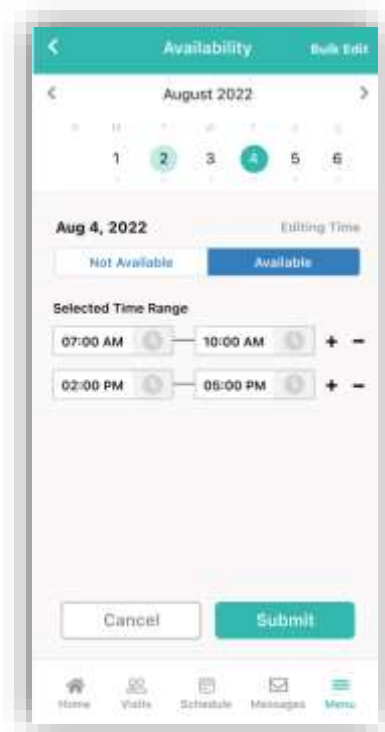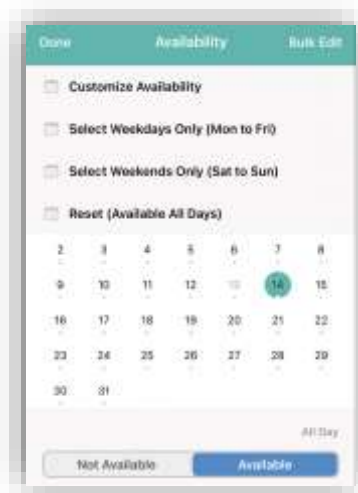Customize Availability allows clinicians to select multiple days. Default to Weekdays Only (Mon to Fri) allows clinicians to edit weekdays. Weekends will be disabled. Default to Weekends Only (Sat to Sun) allows clinicians to edit weekends. Weekdays will be disabled. Reset (Available All Days) is the default

selection until edited by clinicians. The edited calendar will be available to organizations viewing the clinician's profile.

Immunizations

During the initial setup, clinicians will need to document their vaccinations. The section is split between the **IMMUNIZATIONS** and **ATTESTATION** tabs. Starting with the attestations, Tuberculosis and Hepatitis B are required.
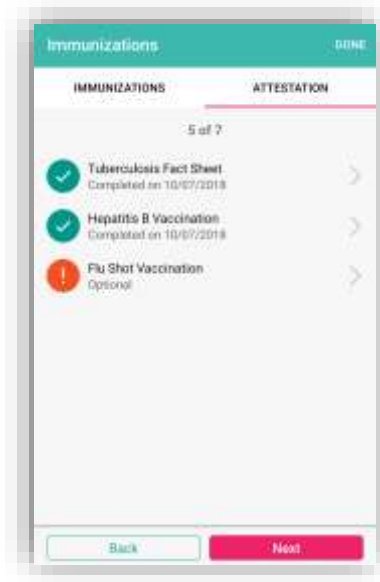
Read the Tuberculosis Fact Sheet, then check the box confirming the text was read. Then select **Tap to sign** in the bottom left.
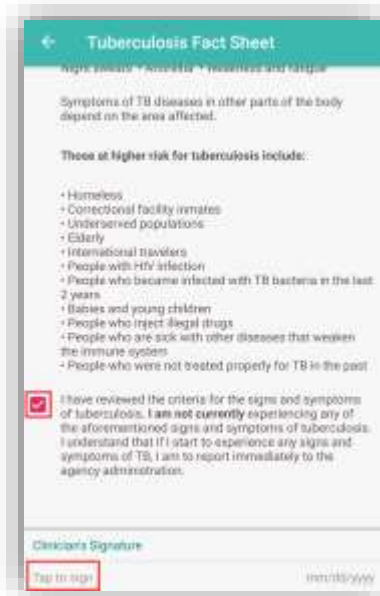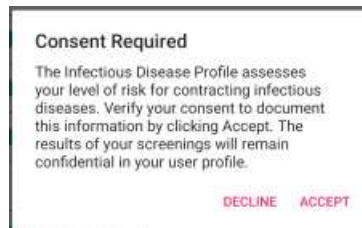
The clinician will enter their signature and select the **Submit** button.

Complete each vaccination and the page will change from exclamation points to check marks signifying completion.

Infectious Disease Profile

View user completed screenings or add a new screening. Before completing a clinician COVID-19 screening on Axxess CARE, users must provide consent by selecting **ACCEPT** in the Consent Required pop-up box.
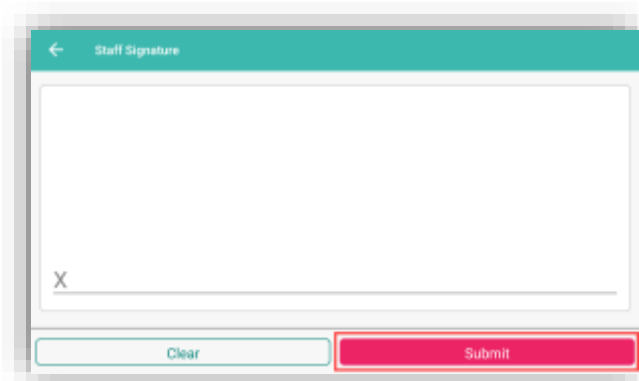

Select a completed screening to view the screening questions and answers. The screening questions and answers appear in gray.

NOTE: Completed screenings cannot be edited, only removed by selecting the trash can icon.
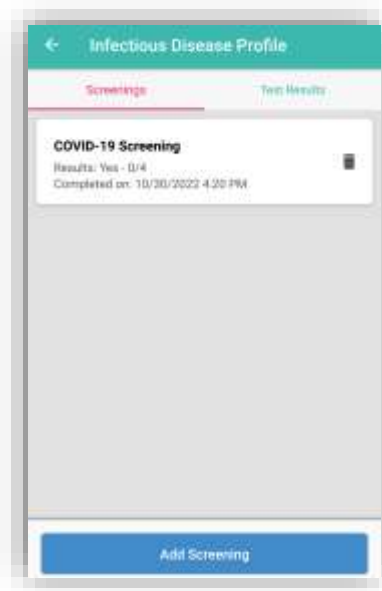
Select **Add Screening** to add a new screening.
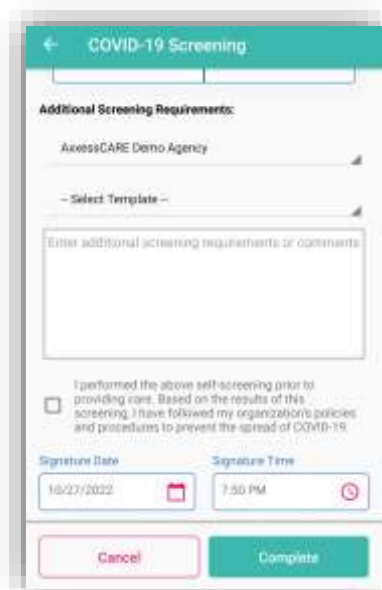
Enter a temperature, answer the screening questions and assign a risk level. The organization the user works for may require additional screening requirements at this point or use a template or add any comments in the free text box. Select the screening acknowledgment check box, then confirm the signature date and time. Select **Complete** to finish and save the screening.
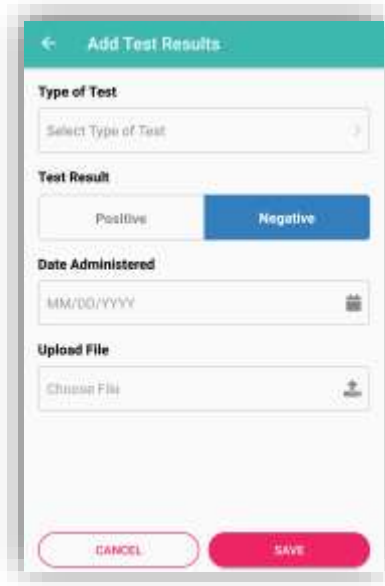
Once a clinician COVID-19 screening is completed, the results appear in the clinician's profile for organizations to review before assigning a visit. Based on

the COVID-19 screening risk assessment, **Low Risk** or **High Risk** appears above the clinician's photo for organizations to quickly and easily review when selecting visit applicants.

Users can upload infectious disease test results to their clinician profiles. Once test results are uploaded, organizations can view the test results when vetting the clinician's application for posted visits. To upload test results to the clinician profile, navigate to the **Test Results** tab.
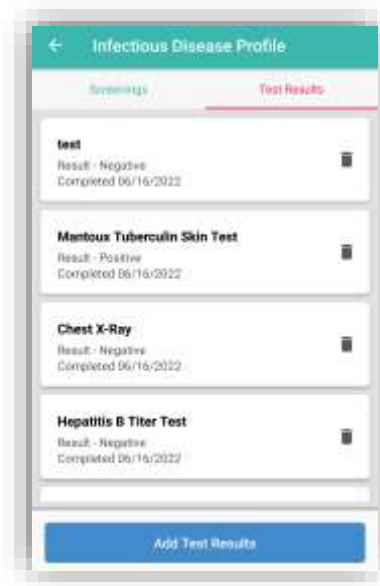
On the **Add Test Results** screen, select the type of test from the **Type of Test** drop-down menu. Select **Positive** or **Negative** under **Test Result** and enter the date the test was administered under **Date Administered**.

If necessary, upload a photo of the test results using the **Upload File** field. Once all necessary information has been entered, click **Save** to finish adding the test results to the profile.

Applied Visits

Shows a list of all visits that the user applied to perform. Visits are listed one by one with the date at the top, the type of visit, organization, Pay Rate and how far away the visit is. Select **STATUS** in the top right to see the total for all visits.

A table will expand from the bottom of the page to show the number of Applied, Unassigned and Withdrawn/Returned visits. Selecting outside will collapse the table.

All Visits

Shows visits for every status. It will list the type of visit and the status below, with the patient's name and the date of the visit. Select the visit to view more details. Status and date can sort this page by choosing either in the top right.


Earnings

This page shows the total amount earned in the last month and the number of Completed Visits. All transactions made through Axxess CARE are categorized as Received, Pending Release or Anticipated under All Transactions. Select a section to view payment details.

- Received shows payments that have been released and sent to the user's bank account.
- Pending Release shows payments that are being processed for completed visits that have been approved in the QA Center.
- Anticipated shows payments for scheduled and assigned visits that are awaiting completion or pending QA approval.
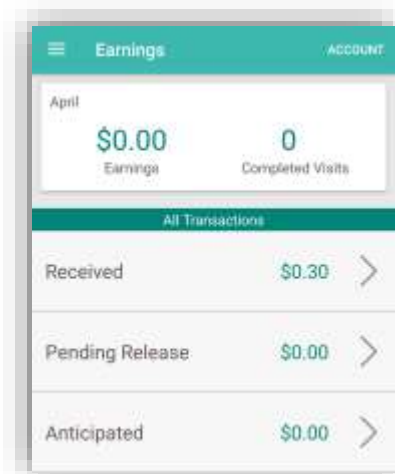
In the Received Earnings section, select the icon in the top right corner of the screen to download and/or print payment details. Use the buttons across the top of the screen to filter payment information by month, year, or a selected **date** range. Use the **Sort By** button to sort payment details by date**,** organization name or patient name.
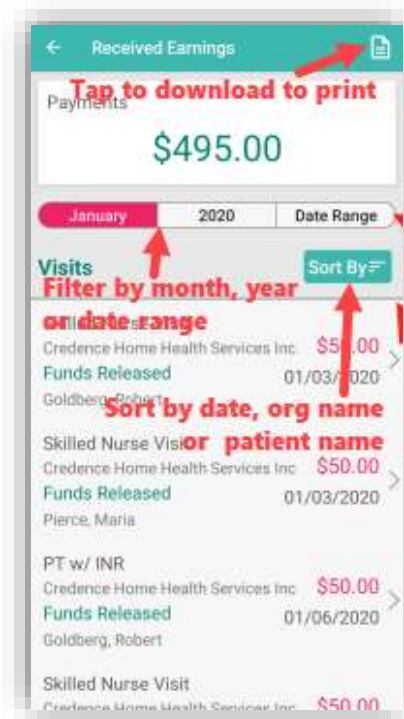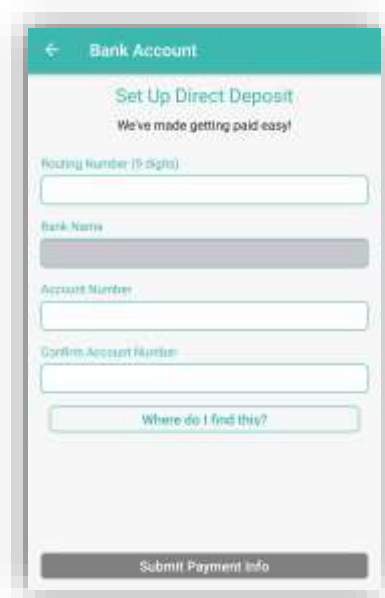

Payment Account

All payments from organizations will be deposited into the bank/checking account information listed by the summary here. To update the bank/checking account, select the **Edit Bank Information** button.
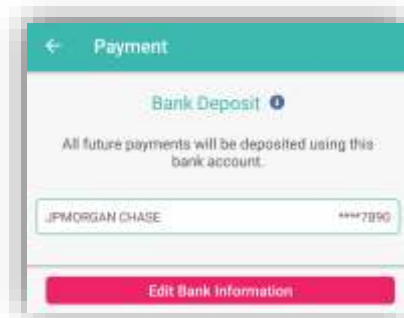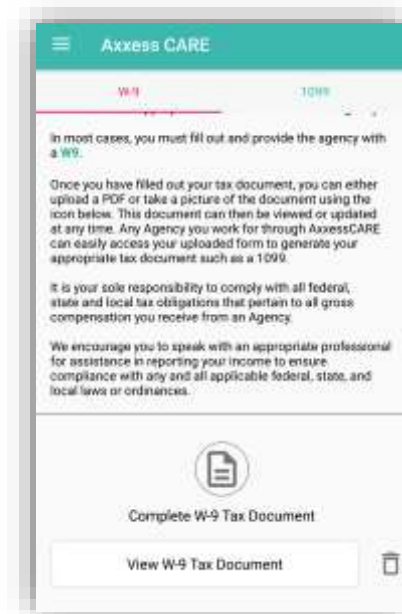

Enter the Routing and Account Number of the user's bank/checking account. If those numbers cannot be found, select the **Where Do I Find This?** button. Enter

the bank name and confirm the account number. Once entered, select the **Submit Payment Info** button to complete.


Tax Documents

Clinicians using the Axxess CARE app are contract/1099 employees. When a clinician earns $600 or more from an organization on Axxess CARE, the clinician must submit a W-9 form to the organization. This section houses the W-9 and 1099 forms in two different tabs.

Under the **W-9** tab, select the **Complete W-9 Tax Document** form and it is prefilled with information from the clinician profile. This information can be edited as needed. Users must enter their Social Security number and review and verify their demographic information. After the form has been reviewed, sign the document to confirm that the information is correct. The document will then be sent to the organization that the user has worked for, and the organization will provide the user with a 1099 form.

Axxess CARE makes this task easy by automatically generating a 1099-NEC form for each clinician with the earnings paid for the year. The organization must review and approve the form from the web-based app. If changes are necessary, the administrator can edit the form as needed. Once the form is approved, it will become available to the clinician in the Axxess CARE mobile app by selecting the **1099** tab and selecting the name of the organization.
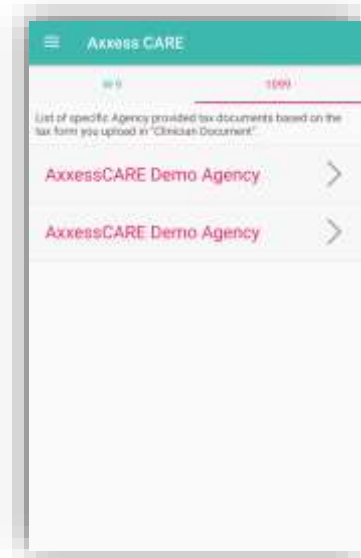

The 1099 will display and can be shared by the clinician by selecting the icon in the top right of the screen.

Contact Us

The top section is the links to Axxess social media accounts. Below that shows Frequently Asked Questions (FAQ). If the password is forgotten, enter the email address associated with the account and select **Reset Password**. Axxess Support are available Monday - Friday from 5:00 a.m. – 9:00 p.m. CT. Select the **Call** button to auto-dial the support number. Select **Email** to send a message.
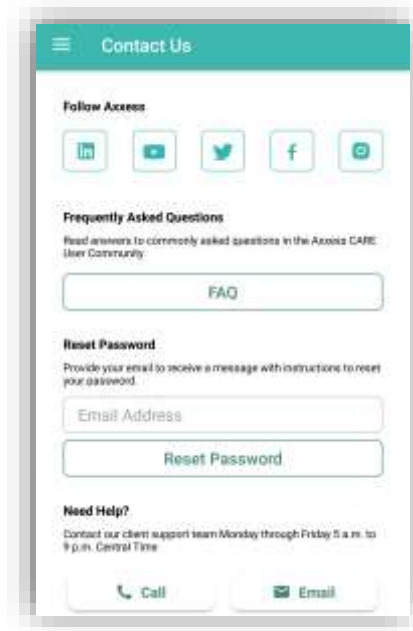
Log Out

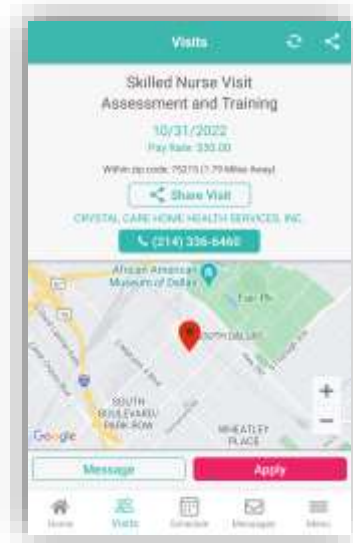To leave the app, select Log Out. When logging out the following confirmation will display:
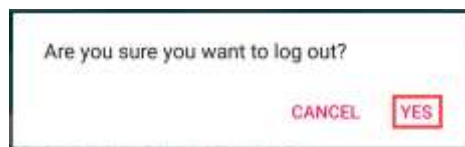
Select **YES** to log out. To get back into the app, re-enter the email address and password.

VISITS

Applying for Visit

Select a visit from *Main Menu/Visits.* It will list the list the visit type, date, pay rate, distance to the visit and the organization. Select **Share Visit**.
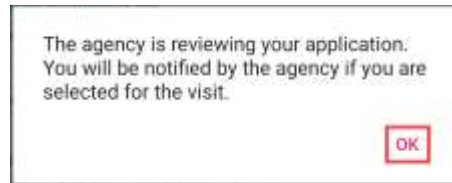
A window expands below. Choose an option to share the visit. Options/contacts will vary depending upon apps downloaded/available. Select outside the window to collapse or select the back arrow.
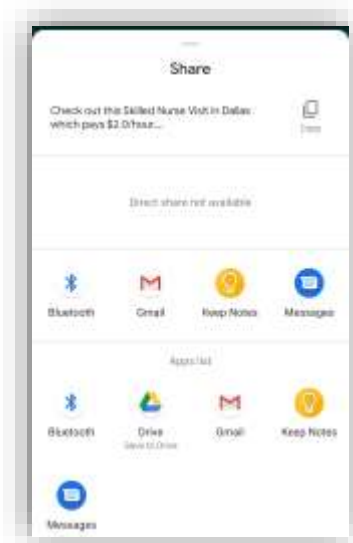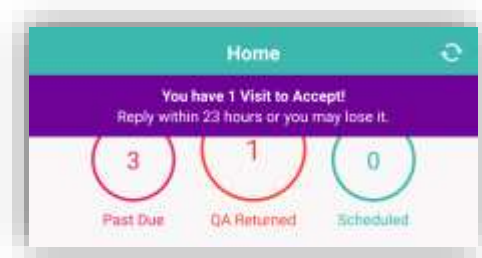

Select **Apply**.

After applying for a visit, a confirmation window will appear. Select **OK**. The visit will be in the list of Applied Visits. The organization must determine whose application they will accept (if there's more than one) in the Axxess CARE desktop application.

The agency is reviewing your application. You will be notified by the agency if you are selected for the visit.

OK

There will be a purple notification bar towards the top of the screen, if the organization accepts the application. There is also a timer to accept the visit. Select the notification bar.

Home

You have 1 Visit to Accept!
Reply within 23 hours or you may lose it.

3   1   0

Past Due   QA Returned   Scheduled

The next page is the **Pending Visits** screen. Select **Accept**.

Pending Visits   DONE

You have 1 Visit to Accept!
Reply within 23 hours or you may lose it.

Wed, 07/01/2020   Expires in 23 hours
Skilled Nurse Visit - Assessment and Training
AxxessCARE Demo Agency

Pay Rate: $0.50 | 0.0 Mi. from Home

Accept   Decline

There will be a confirmation that the visit has been accepted. Select **OK**. The visit will show on the Schedule as Assigned. Select the visit to go to the specifics, including the Patient Profile and the ability to start the visit.
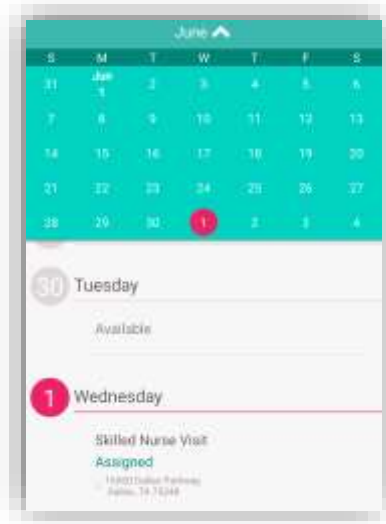
There is an option to call the organization if there are any questions. If the visit cannot be performed, select **Return Visit**.

Rescheduled Visits

Clinicians who have applied for a visit will receive a green banner across the top of the screen, alerting them that a visit they applied for has been rescheduled.
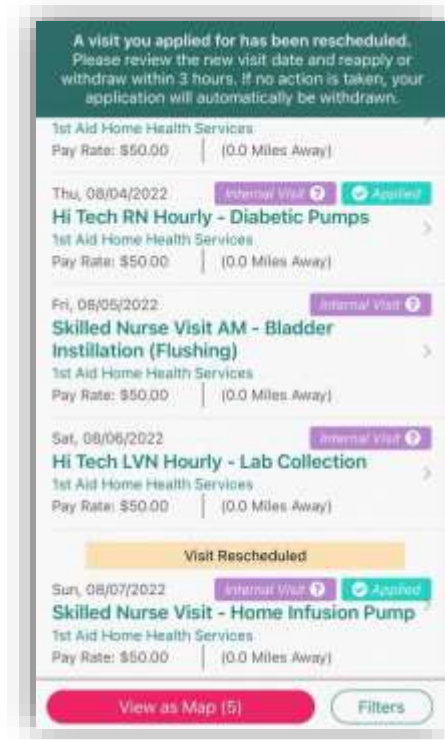
To reapply for the visit, the clinician must select the green banner and select **Reapply**. To withdraw from the visit, the clinician must select the green banner and select **Withdraw**. If no action is taken, the clinician's application will automatically be withdrawn.

If the visit is already assigned, users will receive a message alerting them that rescheduling the visit will require the assigned clinician to reaccept. Select **Continue** to continue rescheduling the visit. The rescheduled visit date will appear in the Activity Log. The clinician assigned to the visit will receive a purple banner across the top of the Axxess CARE screen, alerting them that a visit they have been assigned to is pending acceptance.

To accept the visit, the user must select on the purple banner and select **Accept**. To decline the visit, the user must select on the purple banner and select **Decline.**
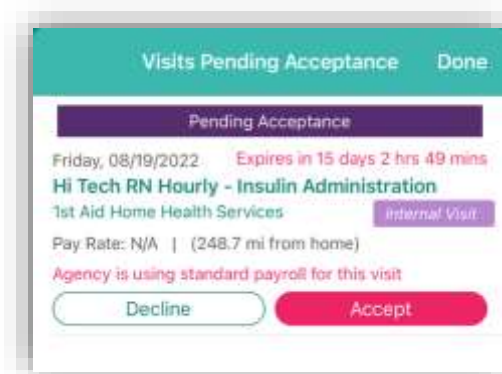
Patient Profile

Select **Patient Profile** to look at the patient's chart before starting the visit.
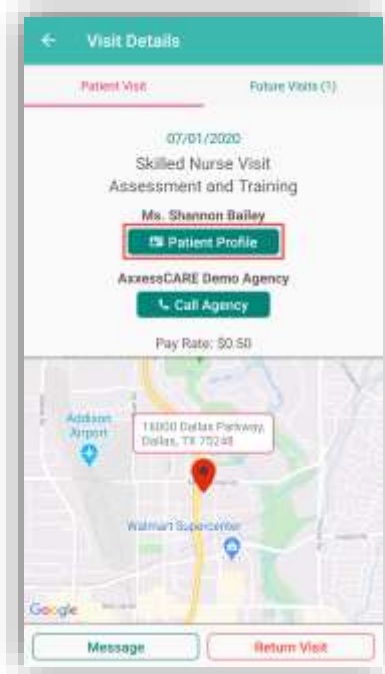
The following is the Patient Profile. All information shown has been entered through the Axxess Home Health application. It shows the patient's DOB, MRN, Gender and Payer. Select **Call** to autodial the patient phone number and **Map** to see the patient's location.
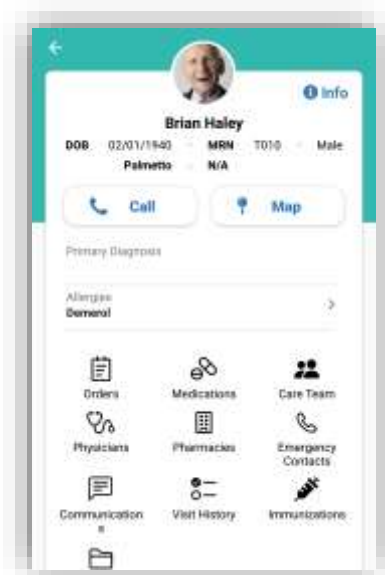
It will also show the patient's Allergies, Primary Diagnosis, and links to view, edit and/or add to their Orders, Medications, Care Team, Physicians, Pharmacies, Emergency Contacts, Communications, Visit History, Immunizations and Documents. Select the **Care Team** button.
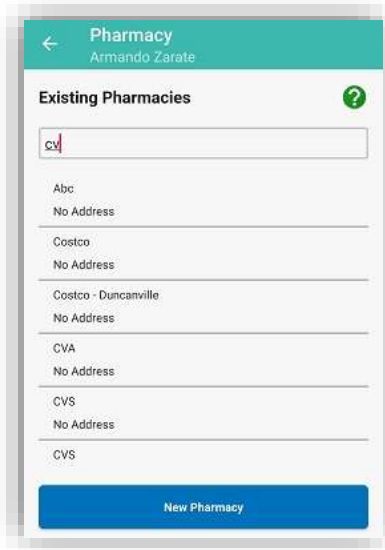
The Care Team window will show all users/clinicians that are tied to this patient.

Message team members individually by selecting the message icon or call them by selecting the phone icon. To message the group, select the **Start Group Text** button. Select outside of the window to close or select the **X**.
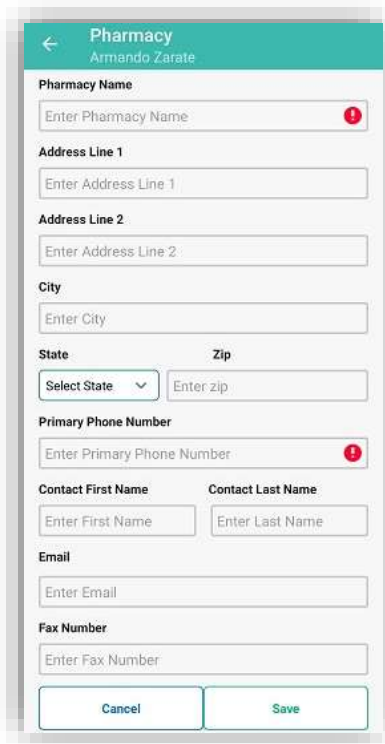
Adding Pharmacies

To add a pharmacy, navigate to the **Pharmacies** section in the patient's profile. The search bar at the top of the screen enables users to search existing pharmacies. To add a new pharmacy, select **New Pharmacy.**

After selecting **New Pharmacy**, enter the following details: Name, address, city, state, ZIP, phone number, contact first and last name, email and fax number.

Select **Save** to save the pharmacy details. After the page has been saved, the pharmacy will be added to the organization list and the list of pharmacies for the patient. In the pop-up window, select **PRIMARY** or **ADDITIONAL.**
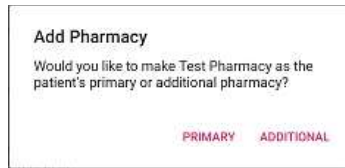
Users can call a pharmacy directly from the patient's profile by selecting the phone icon. To delete a pharmacy from the list, select the trash can icon.

To see the badge that identifies the staff member making the visit, select **ID Badge** from the Visit Details page.

The following ID Badge will display for 60 seconds. When done, select the back arrow in the top left to close the page.
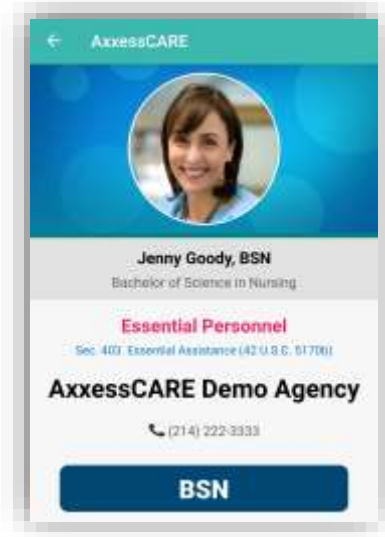
Performing Visit

From the Visit Details, select the **Start Visit** button.

If the user is not near the patient's address, the following verification will display:
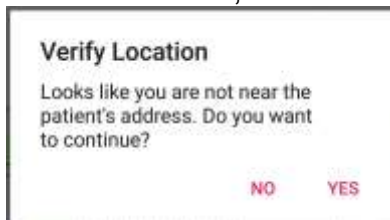
The following is the main menu of the visit. It shows examples of a Skilled Nurse Note. The visit is split up into sections that can be expanded or collapsed. When categories are expanded, the arrow to the left (of category title) will face upward.

Required questions will have either a red asterisk * or will be written that "At least one response is required" or "Must have answer."
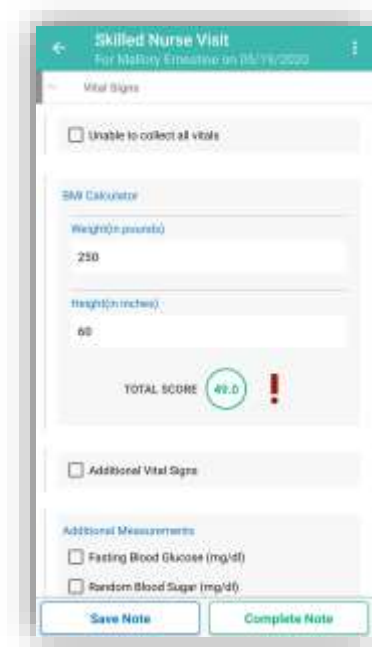
Depending on the assessment being completed, there might be some built-in tests. The following is an example of a BMI score. The score will be automatically updated while completing the test, depending on how questions are answered. The Total Score shows (green text in the circle), depending on the test, their score might put the patient in a group.

Medications

To add medications during a visit, select the **Review Medication Profile** button.
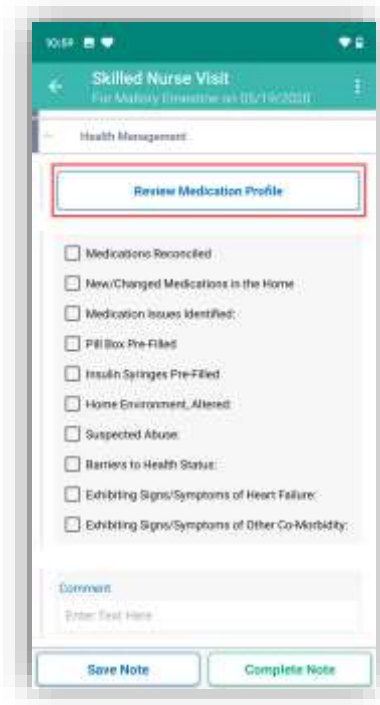
NOTE: The functionality of adding a medication works the same outside of the visit in the Patient Profile.
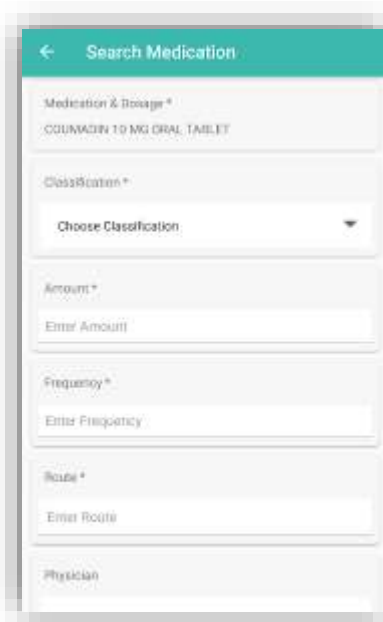
Inside the Medication Profile, select **Add Medications**.

Then search for the medication in the text box. Once found, select the medication.

Choose the classification from the dropdown. Enter the amount, frequency, route and physician.

Choose whether the medication is **New**, **Changed** or **Unchanged**. Enter the start date and date through. Select long standing medication, create an order for this medication or new medication found in the home, no order required. After finishing the form, select **Complete** or **Complete & Add Another**.
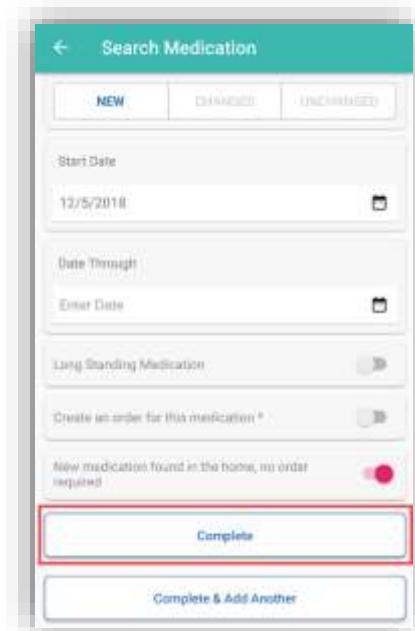
If more than one medication is added, the system will automatically run them for potential interactions. If the system finds any interactions, they will be listed as a warning highlighted at the top of the page. Select the warning.
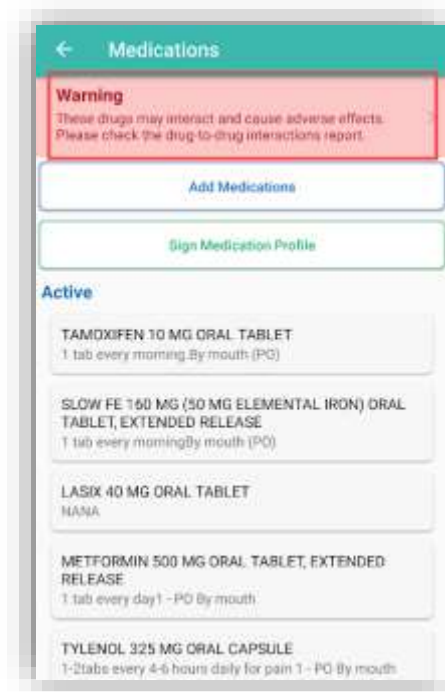
Select the combination of medications that are conflicting to read more.
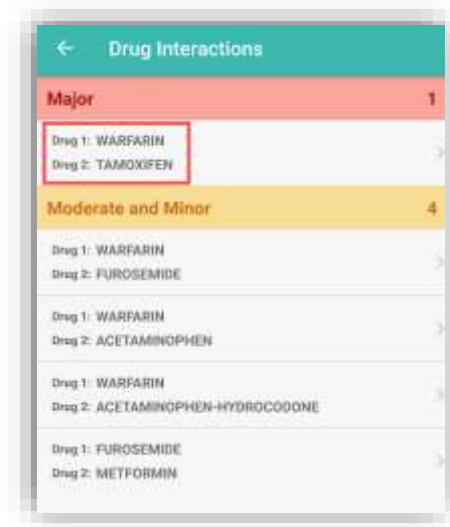
Select the back arrow in the top left to go back to the Med Profile.

NOTE: Interactions are only run for medications currently listed in the Axxess Home Health database.

Once a medication has been entered, edit by selecting the name of the medication. Scroll to the bottom of the page to Discontinue (patient no longer taking medication). After Discontinue is selected, select **YES**. It will then be listed in the Discontinued section of the med profile.

/Axxess
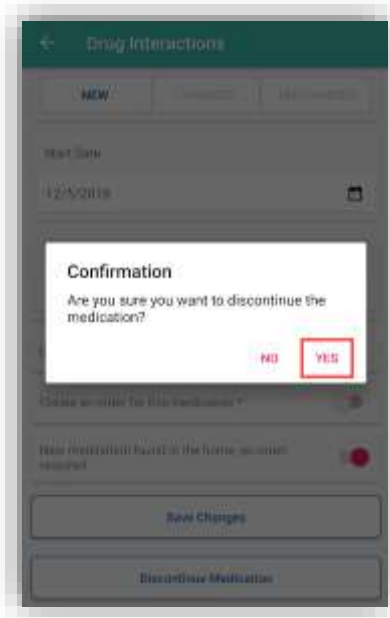
Once finished with the medication reconciliation, select the **Sign Medication Profile** button to verify medications have been clinically reviewed. Sign with finger or stylus above the line after the X. When completed, select **Submit**.

The medication profile will show as reviewed.
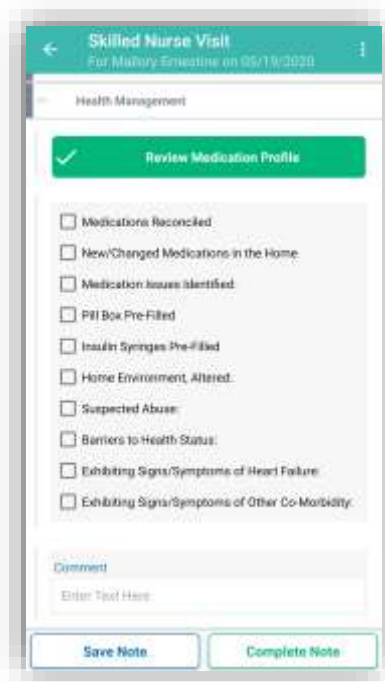
Templates

When completing documentation, users can select a template from the Templates menu to populate the template's text in the associated text field for patient teaching and seamless point-of-care documentation.
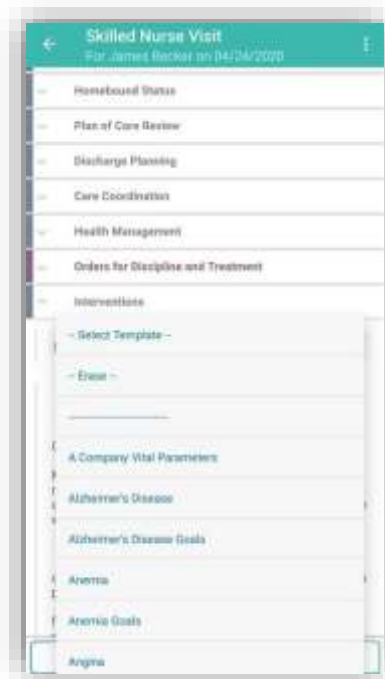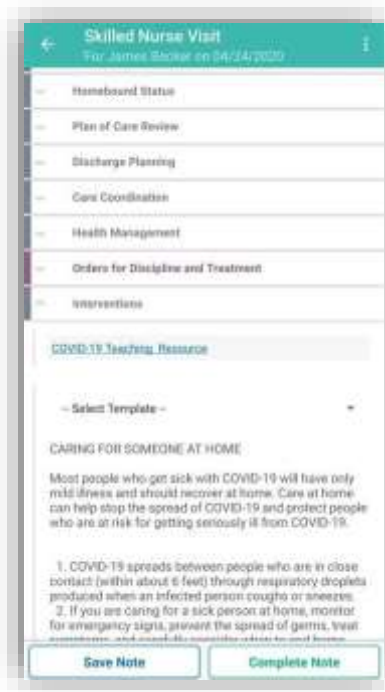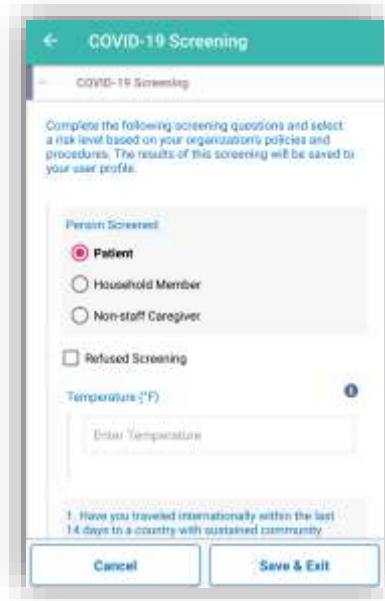
COVID-19 Screenings

COVID-19 screenings can be documented through skilled nurse visits, OASIS assessments, therapy assessments and therapy visit notes. Select the **Infectious Disease Profile** button to navigate to the patient's Infectious Disease Profile.
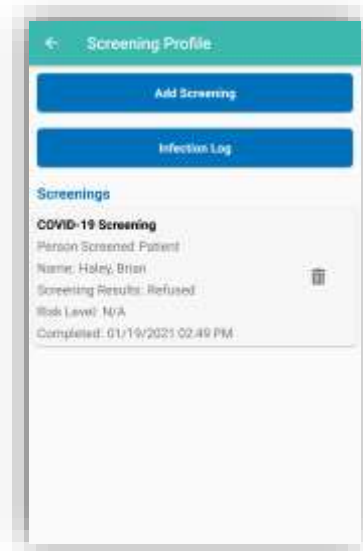
To add a COVID-19 screening, select **Add Screening** at the top of the Infectious Disease Profile.
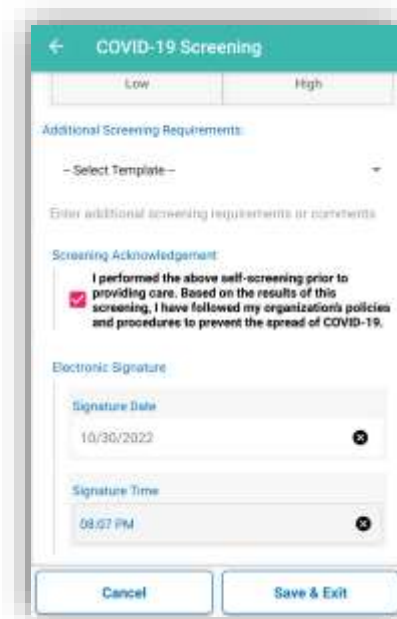
Choose the person screened and enter their name and relationship. Indicate if they have refused a screening. Enter their temperature and answer the screening questions and assign a risk level. Users can select a template from the drop-down menu to load it into the screening. Under the Templates menu, users can enter additional screening requirements or comments in the Additional Screening Requirements section. Check the screening acknowledgement box. When all the screening fields are complete, confirm the signature time and date. Select **Save & Exit Screening** to sign and save the screening in the patient's record.
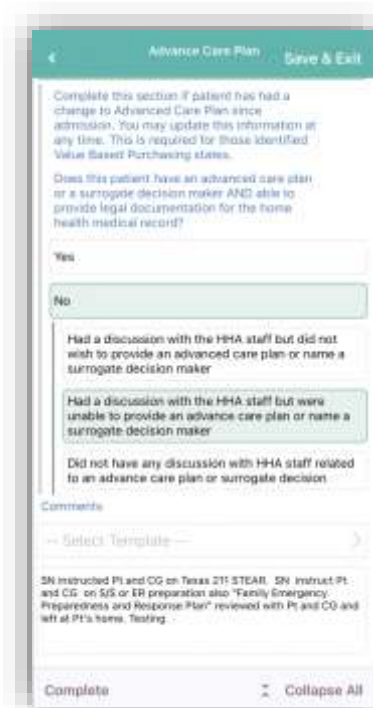
Advance Care Plan

When completing an OASIS assessment on Axxess CARE, an **Advance Care Plan** section appears on the **Prognosis** tab. Users can select the **Advance Care Plan** button in this section to document advance care planning while in the OASIS. Once **Advance Care Plan** is selected, seven options for advance care planning will appear:

1. Advance Care Plan
2. Living Will
3. DNR, Out of Hospital
4. Durable Power of Attorney for Health (a text box for Name of Person and Relationship will open)
5. Physician Orders for Life-Sustaining Treatment (POLST)
6. Medical Orders for Life-Sustaining Treatment (MOLST)
7. Other Legal Documents Valid Under State Law

Users can also document four options for treatment preferences.

1. Medical Treatment Preferences
2. Mental Health/Behavioral Treatment Preferences
3. Cultural/Social Preferences
4. Spiritual/Religious Preferences

At the bottom of the screen, a **Comments** text box is available for users to enter any additional information.
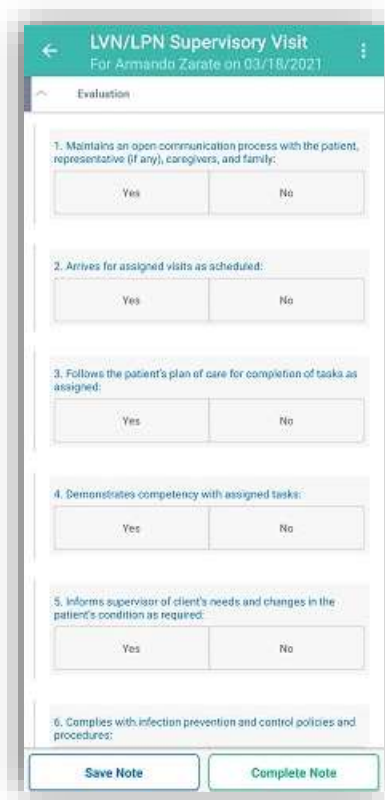
Supervisory Visit

From SN Visit Note, PT/OT/ST Assessment/Evaluation and Reassessment/Reevaluation to document a supervisory visit. On the **Supplemental Documents** tab, select **Perform Supervisory Visit**.
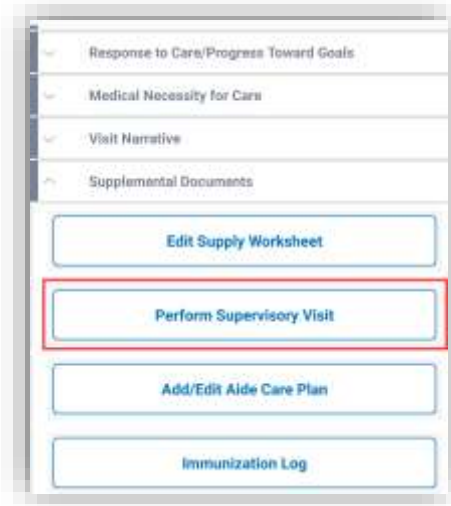
On the **Perform Supervisory Visit** screen, select the type of visit from the **Supervisory Visit Type** menu. Then select **SCHEDULE AND OPEN NOTE**.
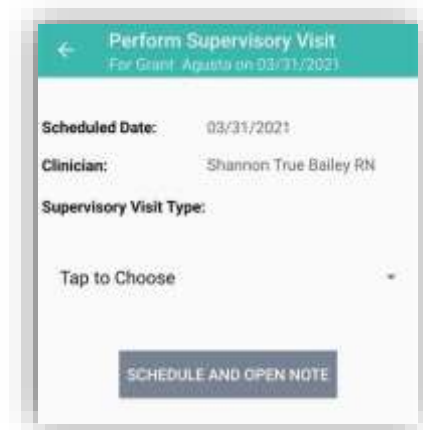
The supervisory visit will open for documentation.

Under **Additional Comments/Findings**, users can enter comments or select a template from the drop-down menu to populate comments. To save documentation entered in the supervisory visit note, select **Save Note**. The note will be saved with the current level of documentation in the patient's chart on the web application. When documentation is complete, enter the signature date and time, and select **Complete.**


Enter the electronic signature and select **Submit**. The completed document will flow to the patient's chart in **Submitted with Signature** status, and the user will return to the associated visit note.
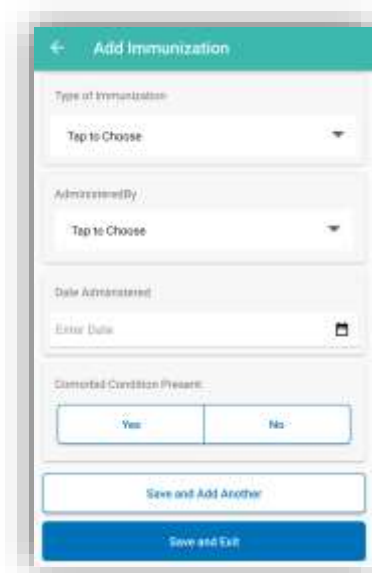
Immunization Log

When documenting a Skilled Nurse Visit Note in Axxess CARE, navigate to the **Supplemental Documents** section at the bottom of the screen and select **Immunization Log** to open the patient's immunization profile.
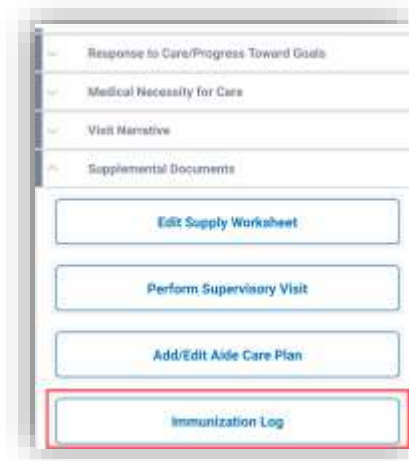
To add a new immunization to the patient's immunization profile, select **Add Immunization.**
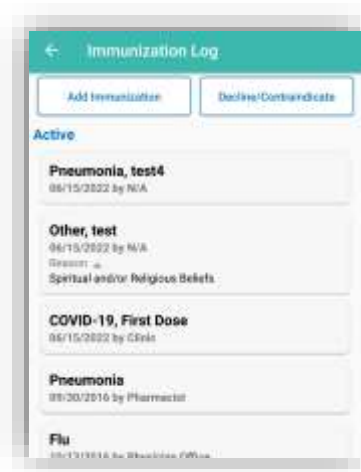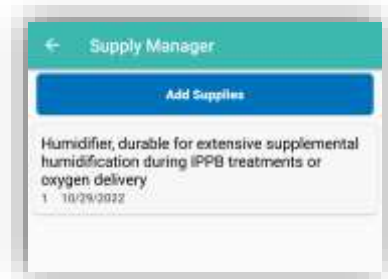

After selecting the immunization type, complete the remaining fields, including the vaccine manufacturer.

Select **Save and Add Another** to more immunizations or **Save and Exit** to complete. This information will flow to the **Immunization Report** in the **Report Center** and to the patient's chart under **Quick Reports.**

Supplies

When documenting a Skilled Nurse Visit Note in Axxess CARE, navigate to the **Supplemental Documents** section at the bottom of the screen and select **Edit Supply Worksheet** to open the patient's supply list. Select the **Add Supplies** button to add more supplies to the list.

Start typing at least four letters to see the list of available supplies in the database. Then select the correct supply.
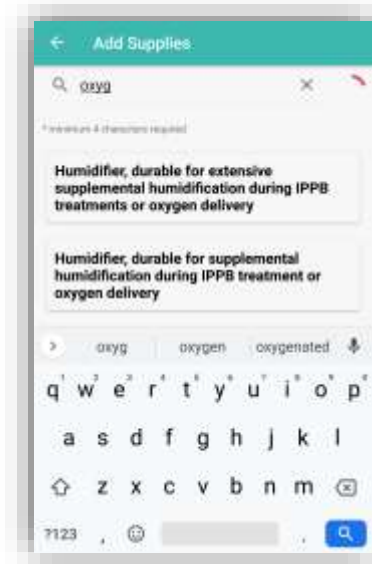
Enter the quantity, date, and then select **Complete & Add Another** for additional supplies or select **Complete** to finish.
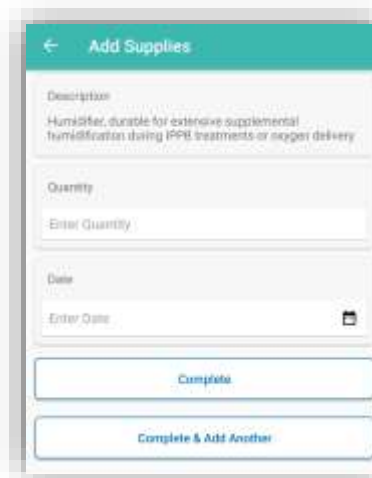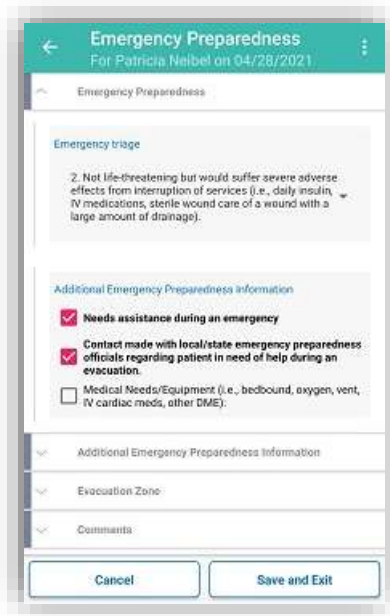

Emergency Preparedness

To document emergency preparedness information from a comprehensive assessment, navigate to the **Risk Assessment** tab and select **Emergency Preparedness**. The following tabs appear under Emergency Preparedness:
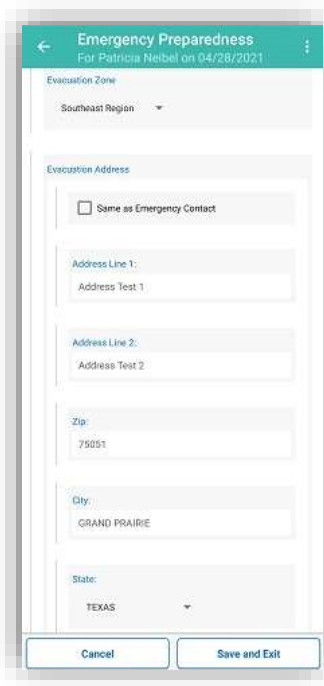
1. Emergency Preparedness
2. Additional Emergency Preparedness Information
3. Evacuation Zone
4. Comments

In the **Emergency Preparedness** section, document the patient's emergency triage classification. The emergency triage classification will prioritize the patient's care in the event of a disaster or emergency that interrupts patient care delivery.

In the **Additional Emergency Preparedness Information** section, use the **Templates** menu to find organization-specific emergency preparedness templates and add additional information needed during a disaster.
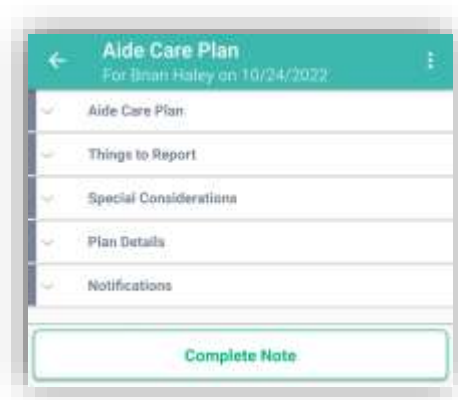
The **Evacuation Zone** section enables users to select an evacuation zone for patients in areas that require evacuation. Select a zone from the **Evacuation Zone** menu and enter an evacuation address. If the evacuation address is the same as the emergency contact's address, simply check the box next to **Same as Emergency Contact**.

In the **Comments** section, enter any additional information that may be necessary during an emergency. This tab enables users to fully document the patient's emergency needs. Templates can also be selected from the **Templates** menu on this tab. Select **Save and Exit** to return to the assessment when the user is finished documenting emergency preparedness details.

Aide Care Plan

To document an Aide Care Plan from an OASIS, navigate to the **Aide Care Plan**. To document an Aide Care Plan from a Skilled Nurse Visit, navigate to the **Supplemental Documents** section and select the **Add/Edit Aide Care Plan** tab and select the **Aide Care Plan** button. The following tabs appear on the Aide Care Plan.
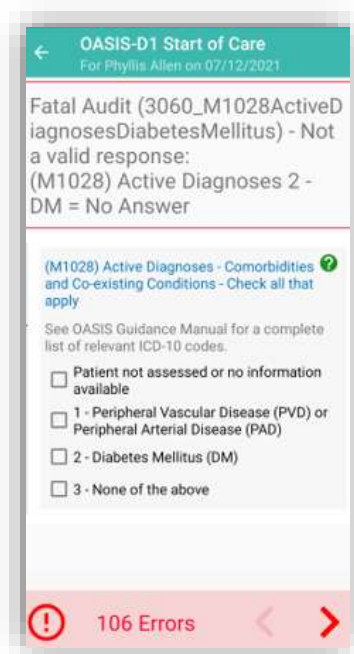
The **Signature Date** field pre-populates with the current date and can be edited as needed. The **Signature Time** field pre-populates with the current time and can also be edited. When **Complete** is selected, the Aide Care Plan will appear in the **Schedule Center** in *Pending OASIS Approval* status. The Aide Care Plan will then flow to the **QA Center** to be approved. Once the Aide Care Plan and OASIS have been approved in QA, the care plan can be linked to scheduled aide notes.

OASIS Audit, Signature and Scrubber

Axxess CARE enables users to audit, sign, complete and submit OASIS assessments at the point of care from a mobile device. Auditing an OASIS assessment ensures that all OASIS questions have been answered and enables users to correct any errors that are identified. To run an OASIS audit, complete the OASIS documentation and click **Save & Exit** or **Check for Errors.** When the audit is complete, a list of errors and warnings will appear for correction.
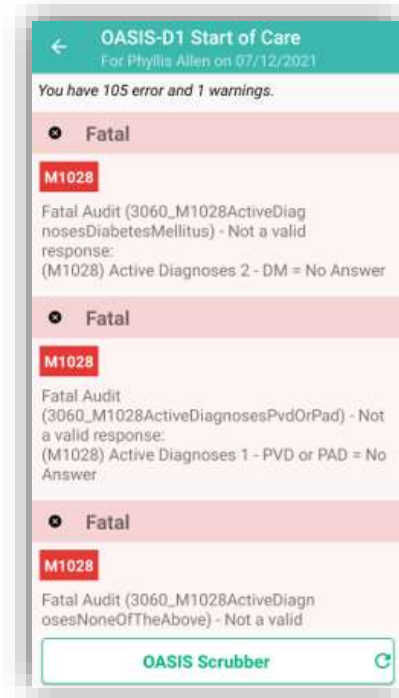
Select an error or warning from the list to view the OASIS question. A description of the error will appear at the top of the screen, followed by the OASIS question and response items. Select a response to resolve the error and click the arrow icon in the bottom-right corner to advance to the next error.
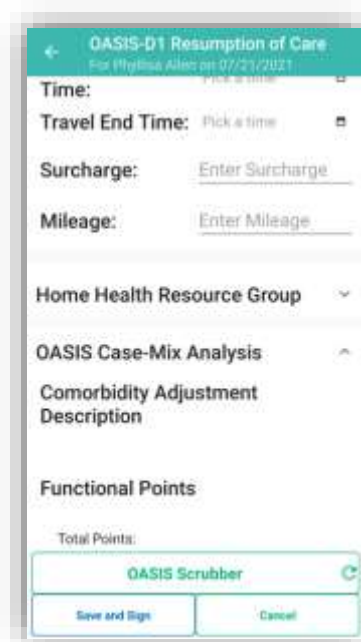
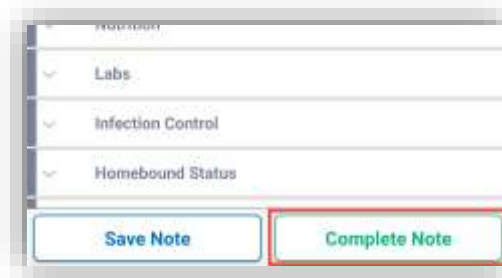Once all errors have been corrected, the HHRG and case-mix calculations will appear. The expected payment amount will also appear for users with the appropriate permissions.

Once the audit is complete, the **OASIS Scrubber** button will appear at the bottom of the assessment. Select the **OASIS Scrubber** button to open and review a PDF of the findings.

The signature page will be available once the users select **Save and Sign**. The page will include all options available on the web signature page. Select **Save & Exit** once all steps have been completed. OASIS assessments cannot be submitted until an audit is completed.

Completing Visit

To leave the visit and save progress, select the **Save Note** button at the bottom left of the visit.

To return to the visit, select the **Documentation** button. To leave the patient's residence before documenting is finished, select the **Patient Signature** button.

When documentation is finished, select **Complete Note**.

Confirm the signature date (auto generates to today's date), then select
Complete.
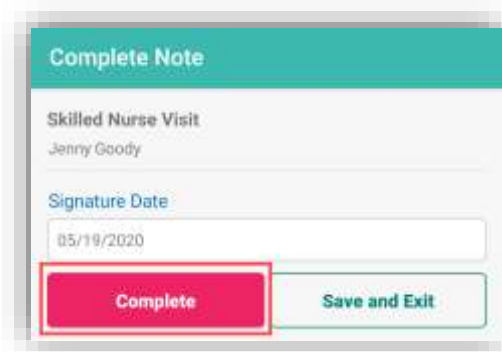
The visit verification completion process begins. If the patient is not able to sign,
select **Select Unable To Sign Reason**, then choose the reason why they cannot
sign from the following options:

- Physical Impairment
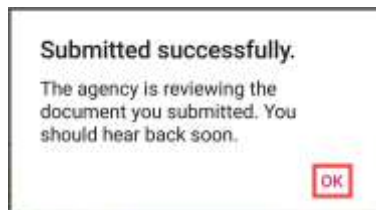- Mental Impairment
- Other (must indicate other reason)

Select the **Get Patient Signature** button.

The patient is then prompted to enter their signature. Either sign with a finger or use a stylus. When finished, select **Submit**.

Select the **Get Staff Signature** button. The user will be prompted to enter their Staff Signature. Once entered, select **Submit**. Then select the **Submit Signatures** button at the bottom. A completion confirmation will display along with instruction that the organization's QA department will be reviewing the visit. select **OK**.
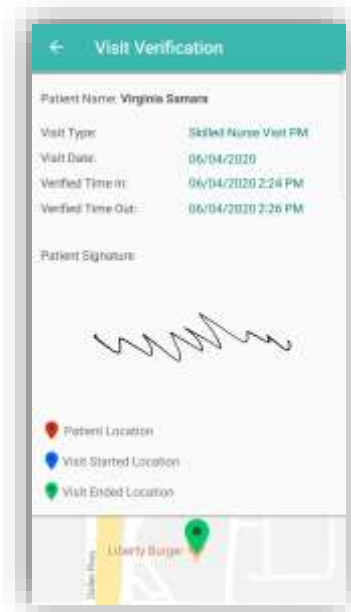

On the Visit Details page, to see the Visit Verification, select the **Visit Log**. The Visit Verification page shows the Verified Time In & Out and the Patient Signature along with the:

📍 – Patient Location

 – Visit Started Location

 – Visit Ended Location

Select the back arrow in the top left to get back to the schedule.

From Visit Details, select **View Documents**. This will show the PDF printed version of the completed visit. Select the back arrow to go back.

NOTE: EVV time in and out will not automatically pull to visit notes. time in and time out must be documented inside visit note.
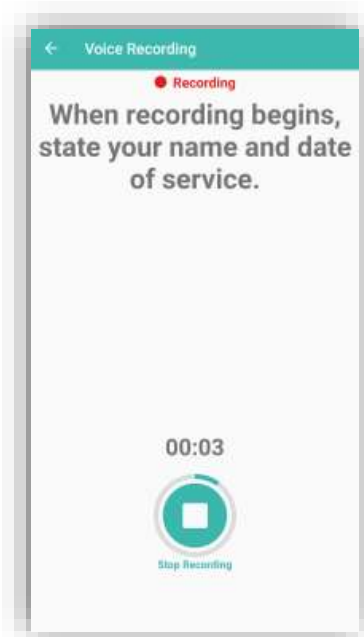
Patient Voice Recording

Users can collect a patient voice recording after selecting **Patient Unable to Sign**. When a patient cannot provide a signature to verify services, select **Patient Unable to Sign** and select the reason that a patient signature cannot be obtained. After specifying a reason, select **Collect Patient Voice Recording** to capture the patient's audio voice recording.


Select **Start Recording** and instruct the patient to state his or her name and the date of service.
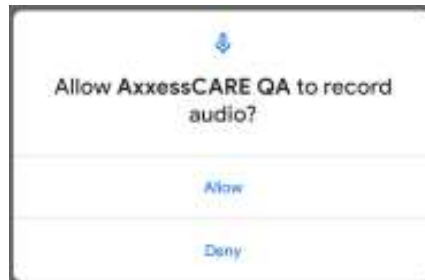

Select **Stop Recording** to end the recording once the patient has stated their name and the date of service. The recording will stop automatically if not ended before 30 seconds.

Select **Play** to play the recording. Select **Replace** to re-record or **Submit** to keep the recording. Once submitted, the **Patient Voice Recording** button updates to green to indicate that the recording was saved, and the user can continue completing the visit.
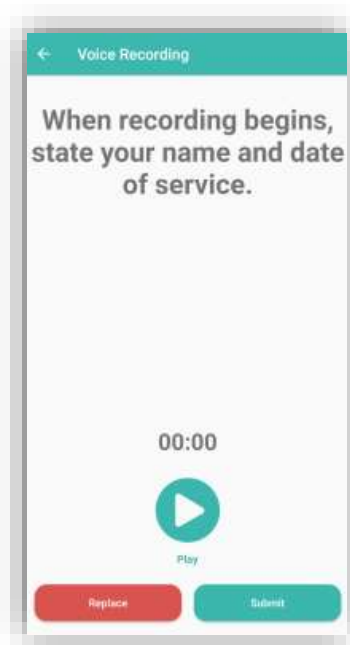
The Patient Voice Recording label will appear on the visit EVV log attached to the visit on the Axxess CARE app, instead of the patient signature, to indicate that a voice recording was collected to verify the visit.
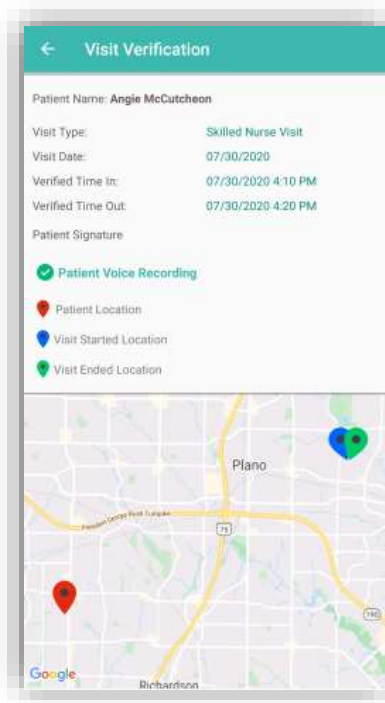
Once the visit is complete, the patient voice recording is saved and stored on the Electronic Visit Verification (EVV) Log screen.

QA Returned

While the visit is being reviewed by the organization's Quality Assurance (QA) staff, the visit status will show as Reviewing.
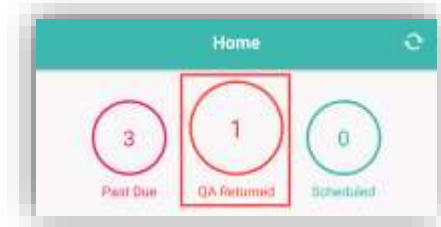

Once it has been returned from the QA staff, it will show as an "Alert" in the **Message Center**. Select the unread message or alert to view.
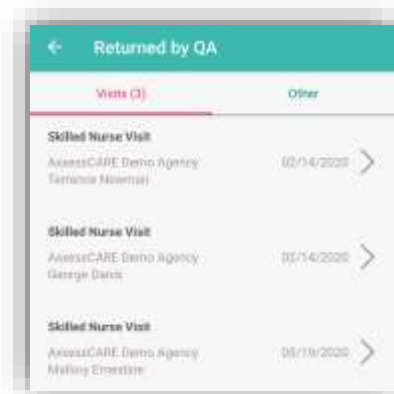
The message from the QA staff is listed in orange.

The orange counter on the home page will also change. Select **QA Returned**.

All visits that have been reviewed will be listed on the Returned by QA page. Select the visit to review the notes.

The reason why the document was returned will be listed at the bottom of the page in the return comments. Select **Edit Documents** to make the requested changes and return to the visit. Make requested updates inside the visit, complete again and re-sign.
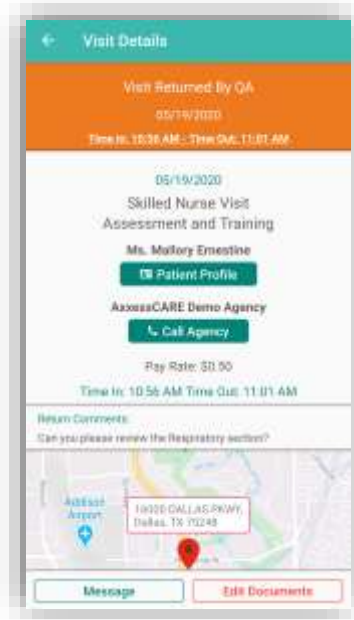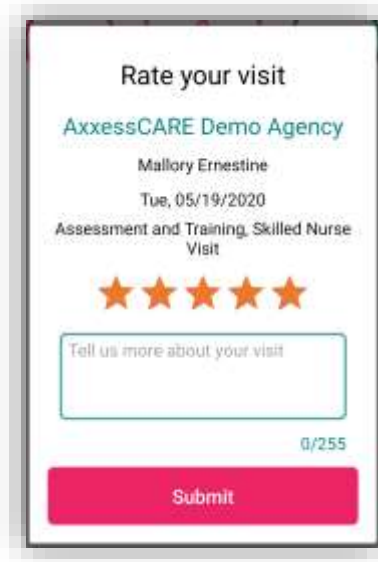

Paid

Once the visit has been reviewed, approved and/or co-signed by the organization, the status of the visit will update to "Paid." The next time logging into Axxess CARE, the system will prompt for a review of the visit.
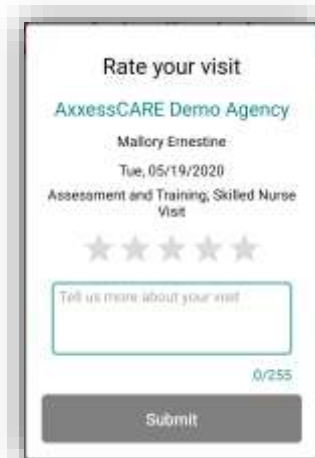
Select the star rating to rate the visit, the stars will change to yellow and the **Submit** button becomes active.

The paid visit will now be housed in the **All Visits** section. Select the visit to view the specifics.

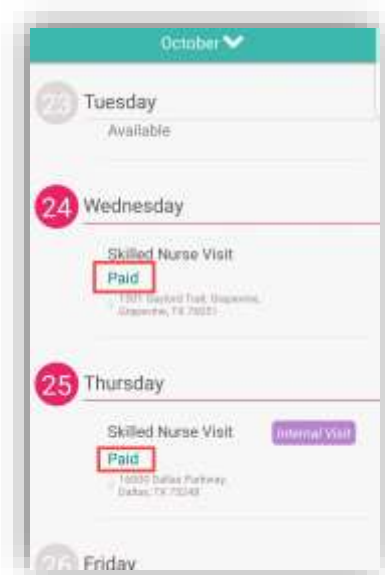The **Visit Details** page shows the updated status and when and how much the user was paid for the visit.
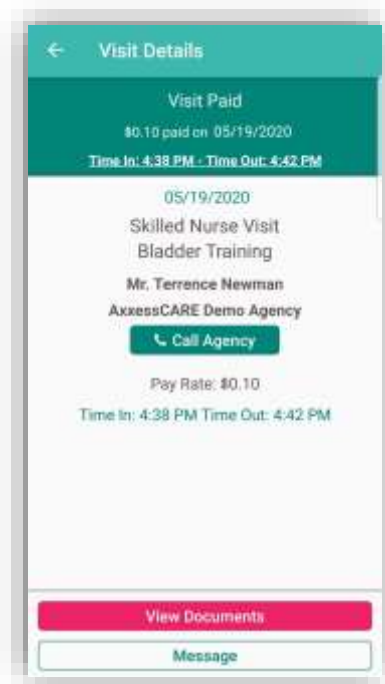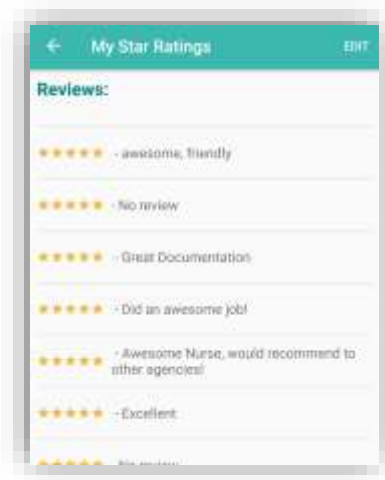
The visit will also have an updated status in the schedule.

NOTE: Payments can take up to five business days to show up in the clinician's bank account.
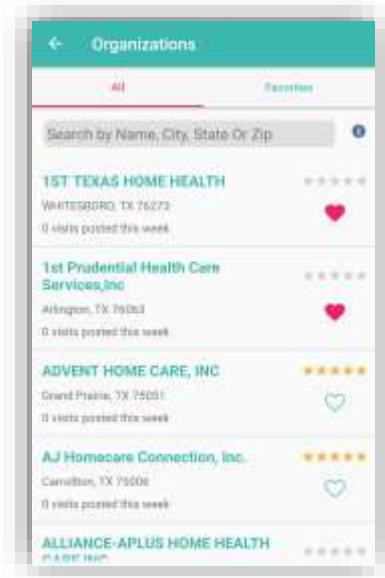
My Star Ratings

To access the list of reviews by organizations the user has completed visits for, select the three-line menu in the bottom-right corner of the screen and select **My Star Ratings.**

This page shows a read online star rating and review from the visits completed in Axxess CARE. Select **EDIT** in the top right to go to the clinician profile.
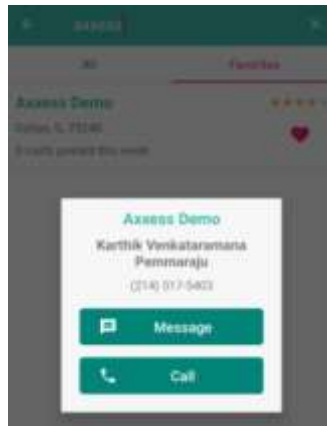
Organizations

To access the list of local organizations on Axxess CARE, select the three-line menu in the bottom-right corner of the screen and select **Organizations.**

The list provides the following information for each organization: Name, city, state, ZIP, number of visits posted for the week and star rating.

Users can search for organizations by name, city, state or ZIP. To search for an organization, enter the information in the search bar. To contact an organization, select the organization from the list. In the pop-up, select **Message** or **Call** to text or call the organization.

When **Message** is selected, the name of the clinician pre-populates in the text message so the organization can easily identify the sender. Users can favorite an organization by selecting the heart next to the organization's name. Favorited organizations appear on the **Favorites** tab in the **Organizations** list.