AXXESS CARE
MOBILE iOS
TRAINING MANUAL

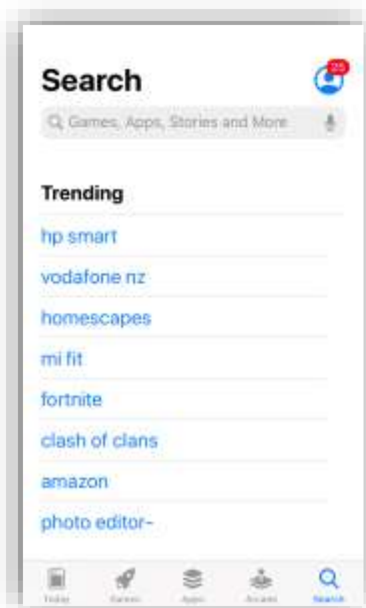
November 2022

Table of Contents

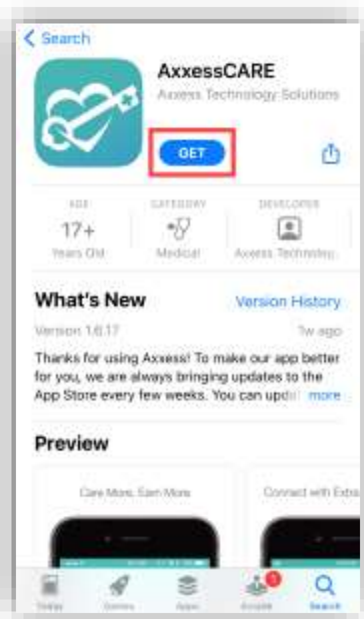
DOWNLOADING APP

Go to the Apple App Store.

Select the search feature at the bottom right of the page.



Search for Axxess CARE. The app is teal and has the Axxess logo (heart and key). Select the **GET** button.

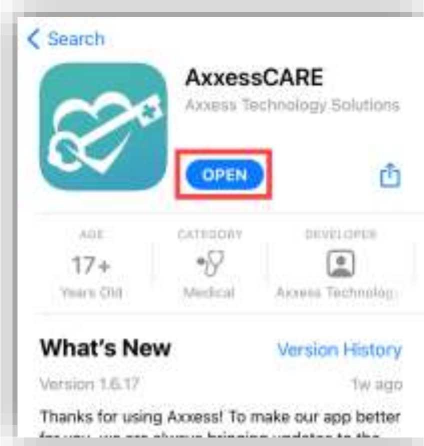


Then there will be a pop up from the bottom of the screen (if logged into Apple account) with an **Install** button.

NOTE: If the app has been removed, go back to the App Store and search for Axxess CARE. After locating, a cloud icon will appear to re-download the app.

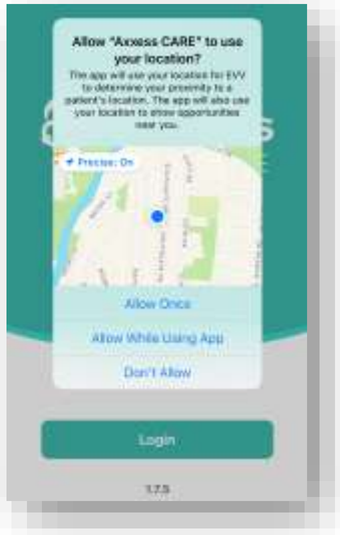
Then the download process will begin.

Once downloaded, select **OPEN**.

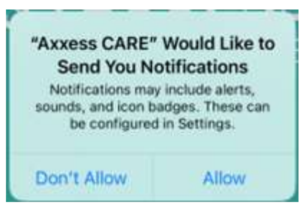


The app will now be located with the rest of the user's apps. Always download the latest update from the App Store for free.

Select the Axxess CARE app to open. Select **Allow "Axxess CARE" to Use Your Location** so that Axxess can access the location while using the app. Allowing this feature is critical for the app to pinpoint locations accurately for Electronic Visit Verification (EVV), which will be covered later.



Select **Allow** so that Axxess can send notifications including alerts, sounds and icon badges depending on how the app notifications are configured in the device's settings.



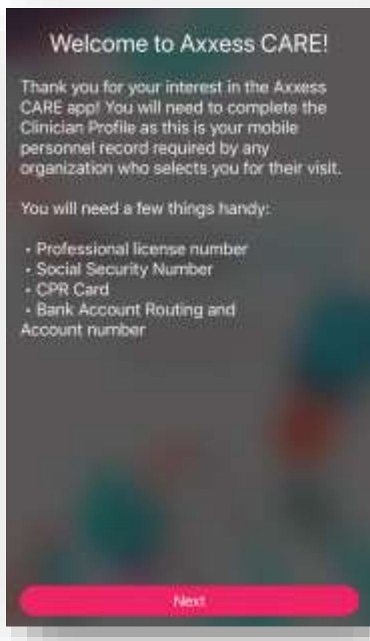
The following is the login screen. Select the teal **Login** button. The app version can be seen under the login button.

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 web version of Axxess Home Health.

If the password was forgotten, then select the **Having trouble logging in?** hyperlink. The version number of the app will be listed at the bottom. After the email and password are entered, select **Log In**.

New Account/Sign Up

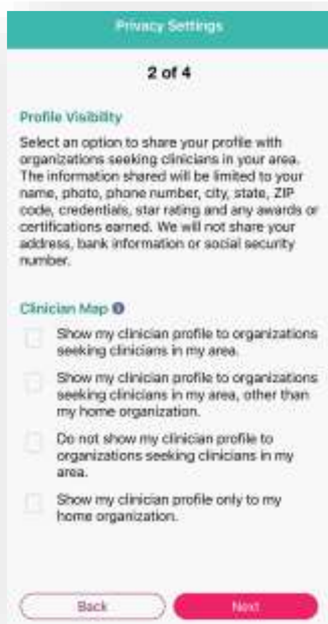
Select the **Next** button after viewing the welcome page.



Setting up a new account is done in three steps:

1. Basic Information – Enter the user's name, Credentials, DOB, Address and Mobile Number, then select **Next**.

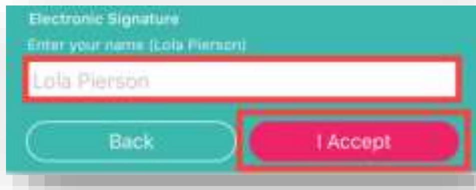
2. Profile Visibility – In this segment, the user will determine the visibility of their profile with organizations. There are four visibility options to select from under the "Clinician Map" section and the icon goes into more detail about what the organizations can see with each option.



3. Background Check – Enter the user's Social Security Number, select the FCRA acknowledgment receipt checkbox, then select **I Accept**.

4. Disclosure - Read the Authorization Regarding Background Check Investigation. Select the acknowledgment receipt checkbox, then select **I Accept**.

5. Then the user will enter their first name and last name, which serves as their electronic signature. Then select the **I Accept** button.



NOTE: The electronic signature must match the first and last name entered during step one of the sign-up process.

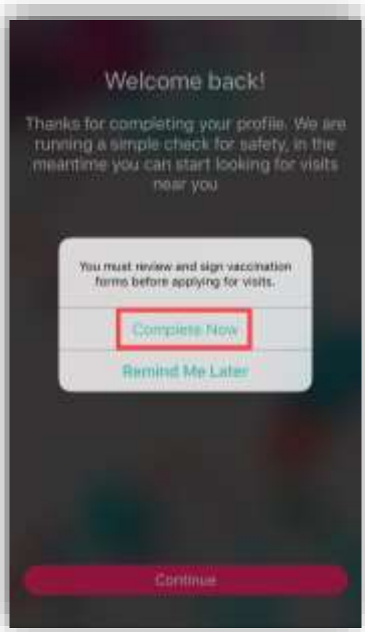
After completing the previous three new account steps, the following prompt will ask the user to enter a four-digit PIN code:

Once a four-digit PIN code has been entered, confirm the passcode by entering it one more time. The passcode must be reentered any time a user leaves the app and comes back or the app times out due to inactivity.

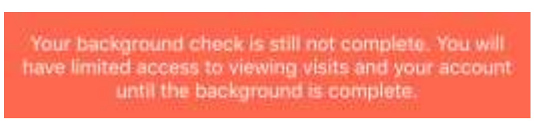
NOTE: More than five wrong PIN attempts will lock users out of the app.

If a new user is being created, the profile setup is still not finished.

The following window will show instructing that the user must review and sign vaccination forms before applying for visits. Select **Complete Now** to go to the User Profile and complete the signup (Profile covered below).



Trying to view visits will display the following orange warning until the background check is complete.



MAIN MENU

Home

The following is the Axxess CARE Home screen. At the top it shows any visits the user has past due, any visits that QA has returned to them, and any visits that are scheduled for completion (more details later). There are five tabs at the bottom of the screen: **Home**, **Visits**, **Schedule, Messages,** and **Menu**. The selected section will be highlighted in teal at the bottom of the tab. To refresh the screen, select the icon in the top right corner.

Route Visits will show the projected route for any accepted visits for that day.

The **Daily Covid-19 Screening** tab allows the user to complete their daily COVID-19 risk assessment from the main menu. Users must accept consent for the screening to continue. The following is an example of the COVID-19 Assessment. Select **Complete** when done to submit.

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 with the drop-down arrow.

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, select the up arrow or swipe up on the list calendar.

Visits

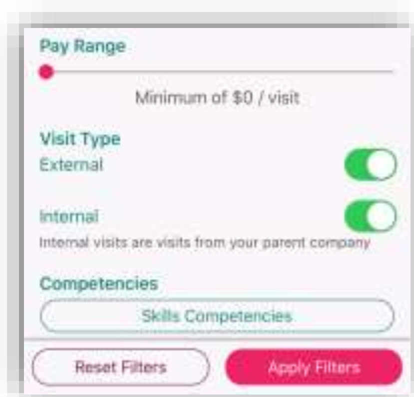
This tab displays available visits for which users can apply. The list displays the day, date, type of visit, organization, pay rate and how far away the visit is.

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

A  icon will list available visits in the map view. Select the pin to view details about the visit. It will list the type of visit, organization, date and pay rate. 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 in an address in the text space or selecting the  icon which will enter the current location's address. Enter a date range by writing or selecting the calendar icon and selecting a date. Decide how wide the search for visits should be by dragging the pink dot along the pink line.

In the bottom half of the page, use the same type of line to determine the minimum pay range. Decide to view visits that are external or internal by moving the sliders. Internal visits are visits from the user's parent company/organization. Select the **Skills Competencies** button to select all applicable competencies, i.e., IV, CHF or COPD Management etc. Then select **Done** in the top right or the filter visits back arrow in the top left to return. After selecting the filters, select the **Apply Filters** button or select **Reset Filters** to set back to the default parameters.



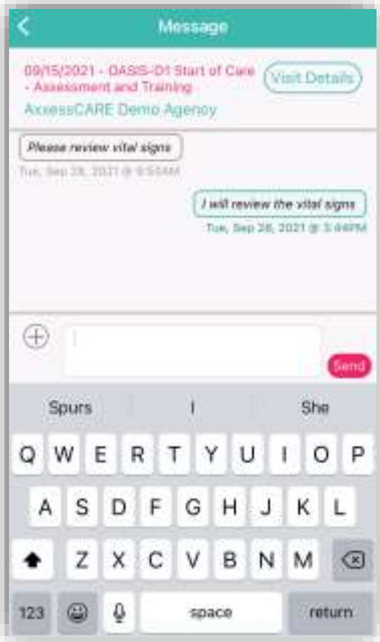
The visits list will indicate if any visits are posted from the user's primary organization and are only available to the staff members of that organization with the following purple icon:

Messages

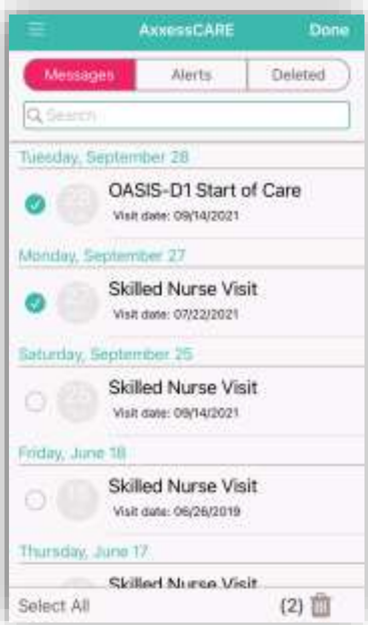
The Message Center is split into three tabs: **Messages**, **Alerts** and **Deleted**. The selected tab will be highlighted in pink. The number in parentheses to the right of the tab indicates how many new items there are in that tab. Use the Search bar to narrow down the list in each tab.

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, and read messages are light gray. Select on a message to view.

The visit information will be listed at the top with a button to view the **Visit Details**. Below the messaging exchange is shown. 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 back arrow in the top left when done messaging to get back to the message center.



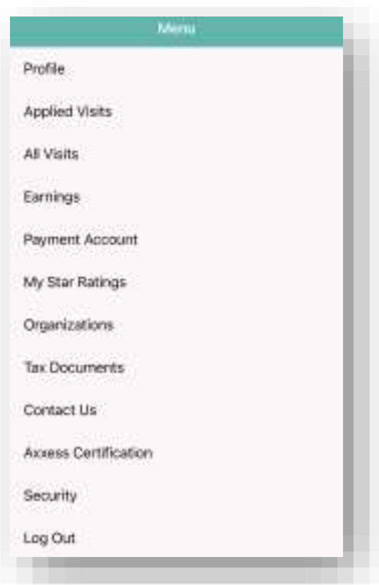
Select the **Edit** option in the top right to remove one or more messages. Bullets will appear to the left of the messages where one or more may be selected. Select the **Select All** option in the bottom left to automatically check all messages. The number of selected messages will be in parentheses in the bottom right next to the trash icon. Select the trash icon when ready to delete it. Select **Done** in the top right when finished deleting visits.



There is a pink notification at the bottom of the screen allowing users to **Undo Delete**.

Removed messages are in the **Deleted** tab.

MENU



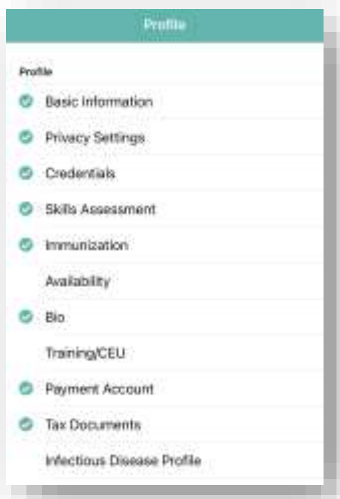
The Menu section has the following 12 options:

1. Profile
2. Applied Visits
3. All Visits
4. Earnings
5. Payment Account
6. My Star Ratings
7. Organizations

8. Tax Documents
9. Contact Us
10. Axxess Certification
11. Security
12. Log Out

Profile

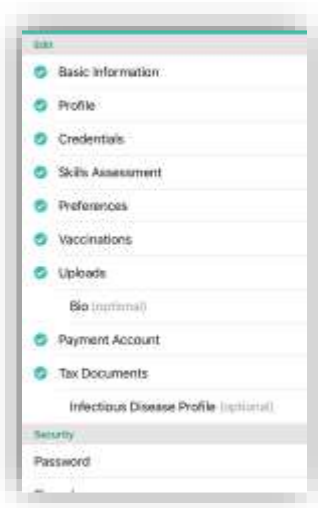
Select **Profile** to view the clinician's profile.



Make edits to the personal profile including changing the passcode and password. The Profile Editing screen reviews the nine-step profile setup.

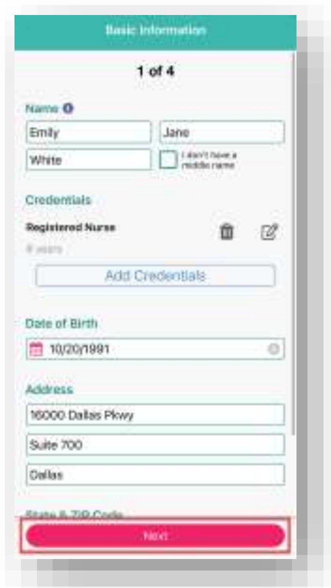
1. Basic Information
2. Privacy Settings
3. Credentials
4. Skills Assessment
5. Immunization
6. Availability
7. Bio
8. Training/CEU
9. Payment Account
10. Tax Documents
11. Infectious Disease Profile (optional)

Go back and make edits by selecting each step. The steps will show the icon when complete.



Basic Information

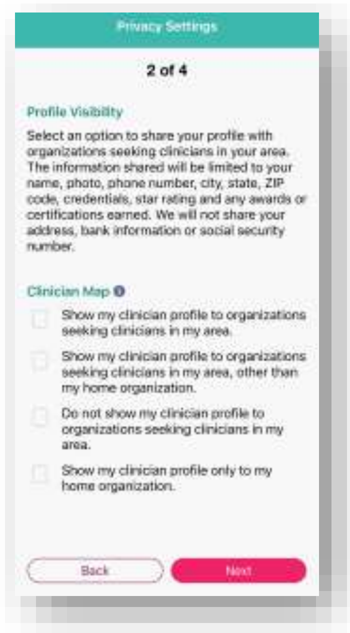
Basic Information is where the user can update originally submitted information such as the user's name, credentials, address and mobile number.



Click **Next** to continue to edit more information or **Done** in the top right hand of the screen to return to the previous menu.

Privacy Settings

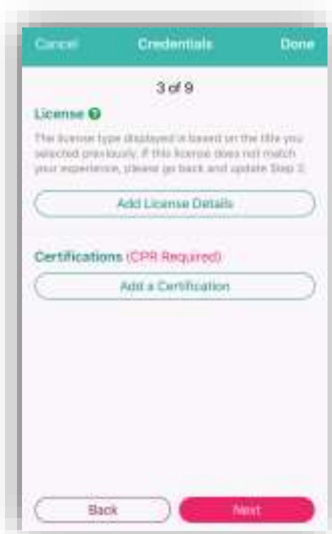
In this segment, the user can edit the visibility of their profile with organizations. There are four visibility options to select from under the "Clinician Map" section and the icon goes into more detail about what the organizations can see with each option.



Click **Next** to continue to edit more information or **Done** in the top right hand of the screen to return to the previous menu.

Credentials

This page lists Licenses and Certifications. To edit a license, select the icon.



From the Add License page, select the RN button below Type of License to choose from a list of other licenses. Fill in the license state, number, date and expiration date. 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.

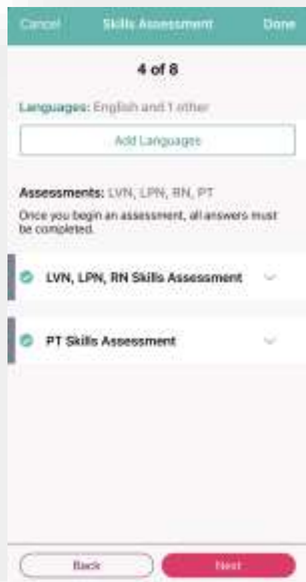
Back at the Credentials page, select the **Add Certification** button. Select **Tap to Choose** below Type of Certification to find a certification. Enter an expiration date, select **Tap to Add** to add a photo of the certification and select **Save**.

NOTE: Adding the CPR Certification and driver’s license are required.

Click **Next** to continue to edit more information or **Done** in the top right hand of the screen to return to the previous menu.

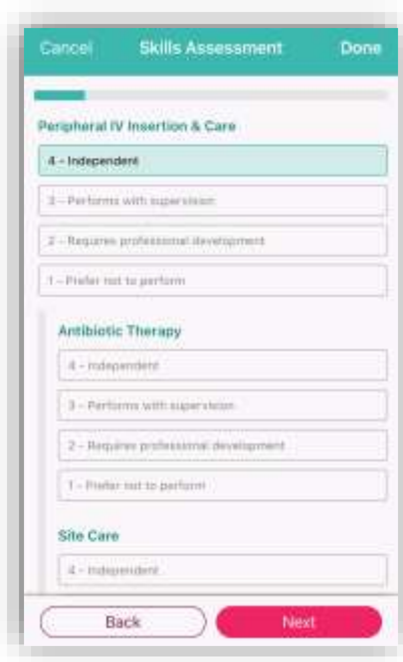
Skills Assessment

This section was also previously completed by the user during profile setup, but that information can be edited here.

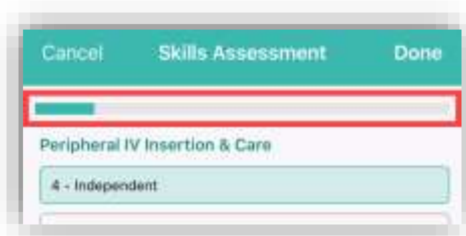


Languages previously chosen will be displayed at the top of the screen. Select **Add Languages** to add or edit languages.

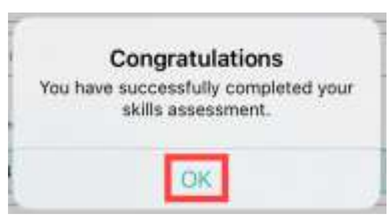
Under assessments, the previously completed assessments can be viewed or the assessment can be updated at this time. Select the skill level for each category of care between Independent, Performs with supervision, Requires professional development and Prefer not to perform. Most categories have sub-categories of skill levels to be answered. Select **Next** to move on to more assessment categories.



As the user makes their way through the assessment, the progress bar will move at the top.

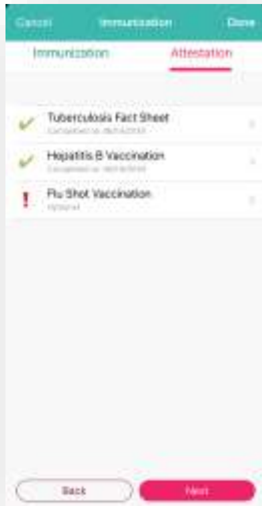


Users will receive a confirmation message once complete. Select **OK** to continue.

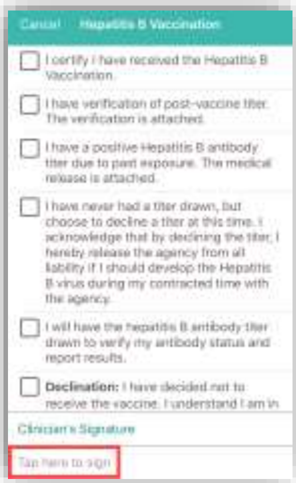


Immunization

During the initial setup, clinicians will need to document their vaccinations. Tuberculosis and Hepatitis B are required. These can be found under the **Attestation** tab



Read the information, then check the boxes confirming personal attestations. Select **Tap here to sign** in the bottom left.



Clinician's will enter their signature and then select **Done**.

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

The **Immunization** tab displays currently entered immunizations as well as offers the ability to add new records. Select **Add Immunization** to bring up the information screen.

Select the type of immunization from the drop-down screen. Select from three status options: Active, Contraindicated, or Declined. If contraindicated or declined is chosen, a reason must be selected from the options listed in the drop-down. If active is chosen, the user will select the date administered, who administered the immunization, and lot number. Some immunizations will ask if a comorbid condition is present. Select **Save** to document entered information and **Cancel** to back out. The immunization is now listed under the immunization tab.

Click on an entered immunization to see details. Select **Inactivate** to inactivate the vaccine. Select the 🗑 icon to delete the immunization (permission based.)

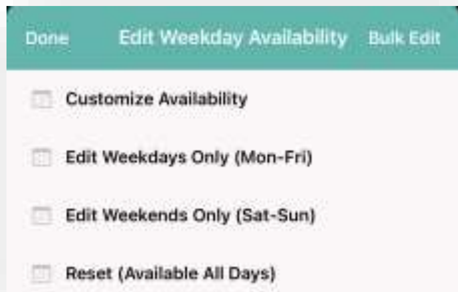
Click **Next** to continue to edit more information or **Done** in the top right hand of the screen to return to the previous menu.

Availability

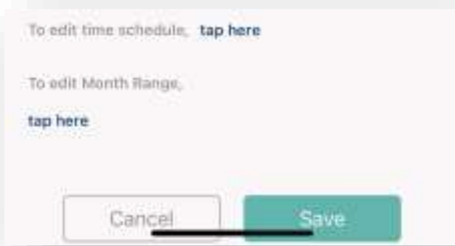
After opening availability, the user will see a calendar screen brought up to the current month. The user can use the arrows to go back and forth between the current month and future months.

The current day will show in teal. If the user has marked themselves as unavailable, the date will be greyed out. To select different days, click a different date and the teal circle will move to the selected date.

Select **Bulk Edit** at the top for options to customize availability, edit weekdays only, edit weekends only, or reset current settings to make the user available for all current days.

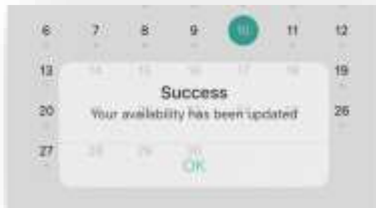


Once the selection has been made, the user can this select to edit the time schedule and to edit the month range with the available times and dates of the clinician.



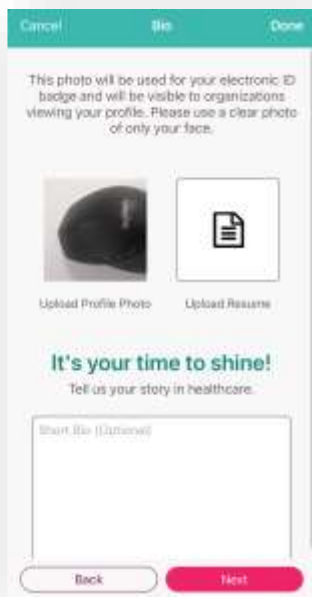
Select **Not Available** to mark the user unavailable for visits. Select **Available** to now be viewable as available to work.

Select **Save** to finalize availability. The following success message will indicate changes have been updated.



Bio

The bio information entered in this section is used for the user’s electronic ID badge and will be visible to organizations viewing their profile. Select the icon (or current photo) above **Upload Profile Photo** to add a clear photo of the user’s face. Select the icon above **Upload Resume** to either add a photo of a resume or a PDF or document version. The user will need to allow permission for the application to access their camera or photos.



There is also a free text box to enter a short bio that organizations will have access to read about the user’s story in healthcare. This is an optional field. Click **Next** to continue to edit more information or **Done** in the top right hand of the screen to return to the previous menu

Training and CEU

Healthcare organizations and clinicians are responsible for maintaining current records of required annual training. To demonstrate completion of the required training programs, clinicians can upload training records to Axxess CARE for organizations to review. Organizations should verify that all required training has been completed before assigning visits to a clinician.

Select **Add Training/CEU** to add a training or CEU. To learn more about this requirement, select the icon.

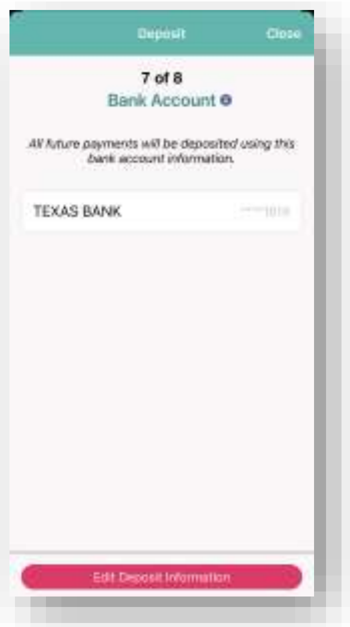
To upload training records to Axxess CARE, select a training type from the Training menu. Enter the date the user completed the training and upload a copy of their training certification. Based on the training completion date, Axxess CARE will monitor upcoming expirations and alert users when a required certification is set to expire in 30 days. Once the user renews the training certification, upload a copy to update the training records.

Clinicians can also upload records for training that is not required. To demonstrate completion of non-required training, select Other under Training and input the name of the training program. Enter the date of completion and upload a copy of the certification. The system will not alert users to upcoming expiration for training that is not required. Select **Save** to finalize documents.

NOTE: A photo, PDF, or document must be uploaded to save the document.

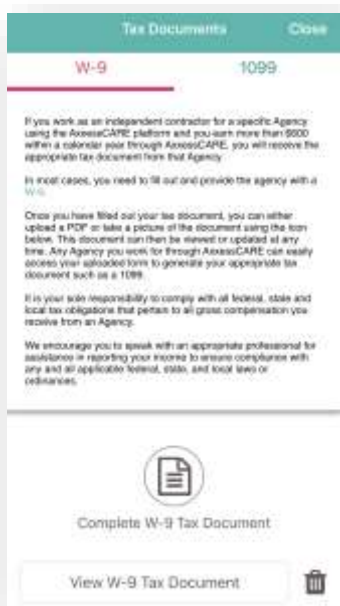
Payment Account

In the Payment Account section, bank account information can be edited. Click the icon to learn more about this process. The bank information entered during user setup or most recently will be listed.



To update this information, select **Edit Deposit Information.** Here the user will enter routing number, bank name, account number, and account number again to confirm. Select **Where do I find this?** for assistance. Click **Submit** for Axxess to verify the bank information.

Tax Documents

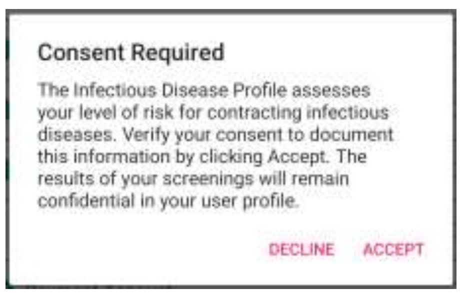


In the Tax Documents section, there are two tabs: **W-9** and **1099**. Under the **W-9** tab, the user can edit their previously entered W-9 information by selecting **Complete W-9 Tax Document**. The sections will pre-populate with previously entered data. The user will follow prompts and edit information as needed. Select **Save** when finished. Select **View W-9 Tax Document** to see previously uploaded files.

In the **1099** section, there is a list of specific organization provided tax documents based on the tax from uploaded in Clinical Documentation. There is a hyperlink for the associated main organization below. When clicked, the PDF of the 1099 will pull up for viewing. Select **Close** in the top right corner to exit.

Infectious Disease Screening

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.

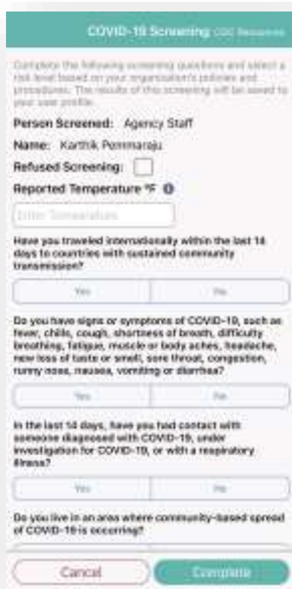


On the main screen, there are two tabs: **Screenings** and **Test Results**.

Under the Screenings tab, select a completed screening to view the screening questions and answers. The screening questions and answers appear in gray.

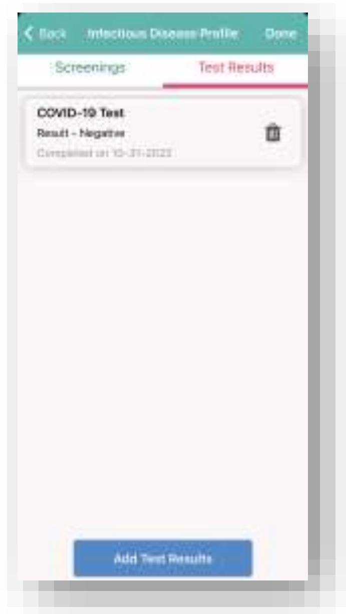
NOTE: Completed screenings cannot be edited.

Select **Add Screening** to enter a new screening.



Answer the screening questions, assign a risk level, and enter signature date and time. Select **Complete** and then submit signature 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.

In the **Test Results** tab, a list of previously completed tests can be viewed. Click into the specific test to view document previously uploaded. Select the trash can icon to delete the test documentation (permission based.)



To add new, select **Add Test Results.** First select type of test from the drop-down, select a positive or negative result, date administered, and upload test file in either photo, PDF, or document. A file must be present to save. Select **Save** to document the test results.

NOTE: A photo, PDF, or document must be uploaded to save the document.

Applied Visits

This 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 from the current location. Select **Status** in the top right to see the total numbers for all visits.

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

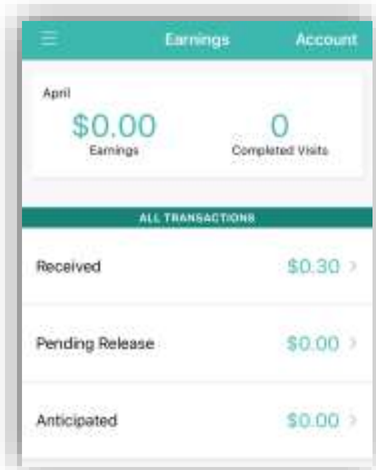
Applied (2)
Unassigned (0)
Withdrawn/Returned (0)

All Visits

Shows all visits in every status. It will list the type of visit; the status will appear in the line below. The patient's name will be on the left and to the right users will see the date of the visit. Select the visit to view more details. This page can be sorted by Status and Date by choosing either in the top right.

Earnings

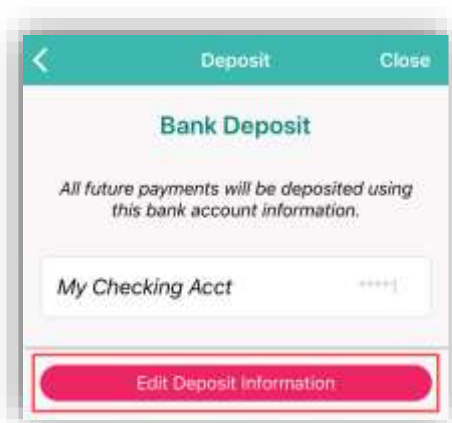
This page will show the total amount earned in the last 30 days. Below this number, users will see the received amount, which is the amount deposited from the organization into the bank that is set up in the Payment Account. The pending release amount shows the total of payments currently being processed by the organization. The anticipated amount reflects any visits that have been started and finished pending a QA review with the organization.



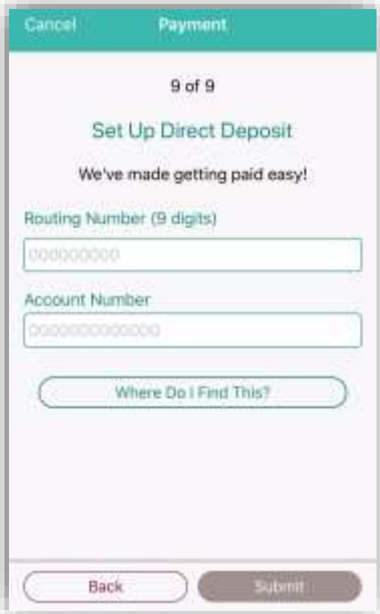
In the **Earnings** section, select the icon in the top right corner of the screen to download and/or print payment details. Use the buttons across the top of the screen to filter payment information by month, year or a selected date range. Use the **Sort By** button to sort payment details by date**,** organization name or patient name.

Payment Account

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



Enter the routing and account number of the user's bank account. If those numbers cannot be found, select **Where Do I Find This?**. Once entered, select **Submit** to complete.

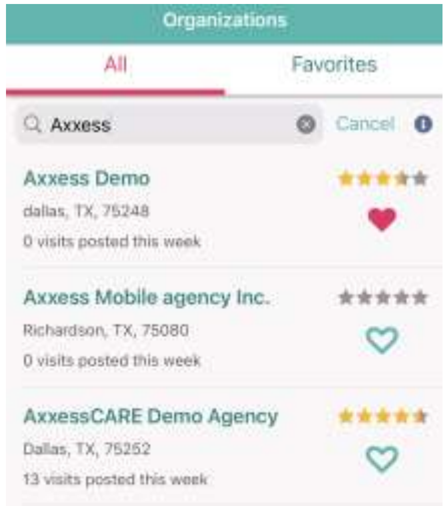


My Star Ratings

From this tab, the user can see star ratings from organizations. It will list how many stars were received as well as from which organization.

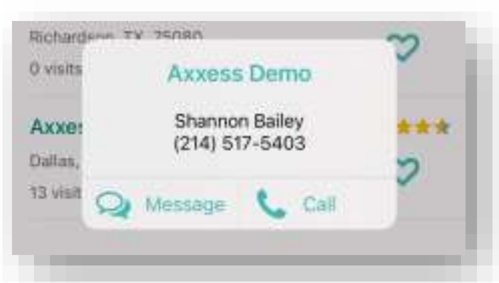
Organizations

From this tab, the user can search through organizations by name, city, state, or ZIP.



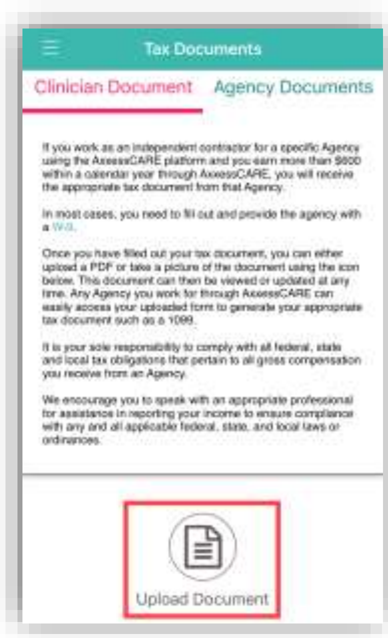
Star ratings from other Axxess CARE users can be seen to the left of the patient's name. The organization can also be favorited by selecting the heart icon.

Filtering by favorites only is also an option by selecting the **Favorites** tab. After selecting an organization, the administrator or manager name and phone number can be viewed and there is an option to message the organization or call. Select the  icon for more information.



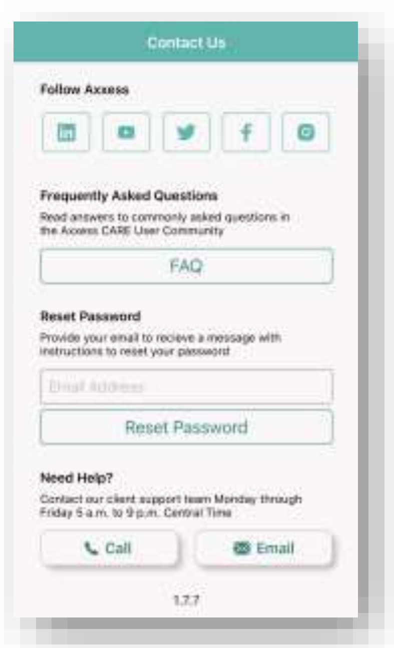
Tax Documents

If users work as an independent contractor for a specific organization using Axxess CARE and earn more than 600 dollars, users will receive tax documents. Upload that document by selecting the **Upload Document** button.

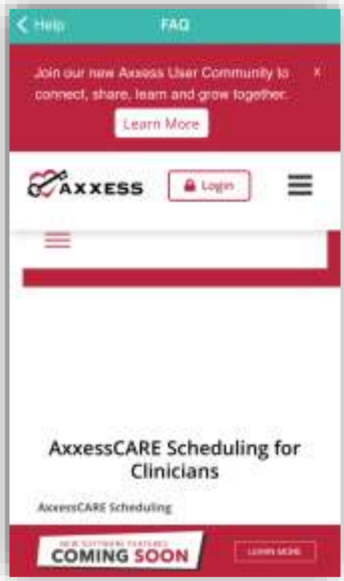


Help

Listed at the top are multiple ways to follow Axxess on social media. If the password is forgotten, enter the email address associated with the account and select **Reset Password**. To call Axxess Support, who are available Monday – Friday from 5:00 a.m. - 9:00 pm CT. The phone number is (214) 575-7711.

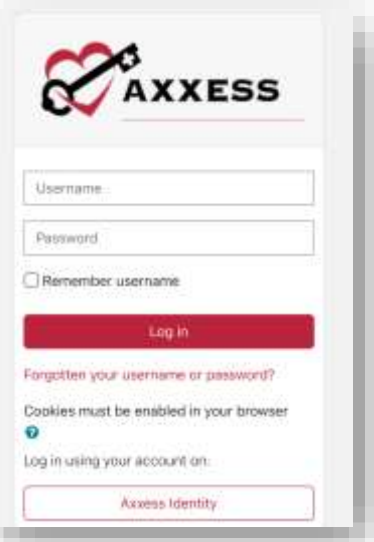


The **FAQ** button sends users to a Axxess Help Center site to ask any questions related to Axxess CARE.



Axxess Certification

From this tab, Axxess Training and Certification platform can be launched for addition education and training. Log in with the Axxess username and password used for logging into Axxess CARE.



Security

To change the password or update the pin, select which needs to be changed and follow the prompts to do so.

Log Out

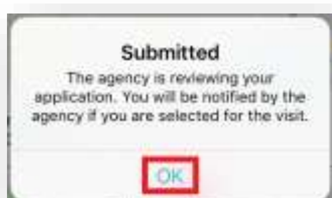
To leave the app, select **Log Out**. To get back into the app, select the **Log In** button, re-enter the email address and password, then select the **Log In** button.

VISITS

Applying for Visit

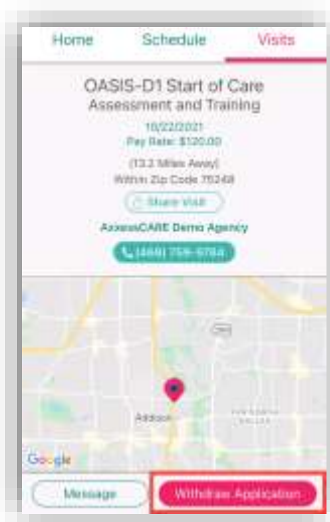
Select a visit from main menu/visits. It will list the visit type, date, pay rate, how far away and the organization. Select the **Apply** button.

After applying for a visit, a confirmation window will appear. Select **OK**. The visit will be on the list of applied visits. The organization determines whose application they will accept (if there's more than one) in the Axxess CARE web application.

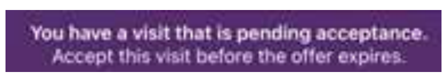


A badge shows to the right of the visit showing the user has applied for the visit.

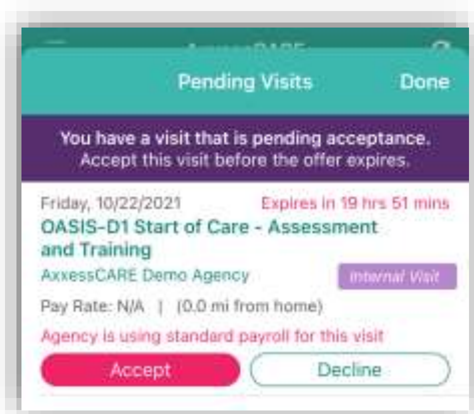
If the application was made accidentally or if circumstances change and the user can no longer perform the visit, the user can withdraw their application. By returning to the visit details page and selecting the **Withdraw Application** button.



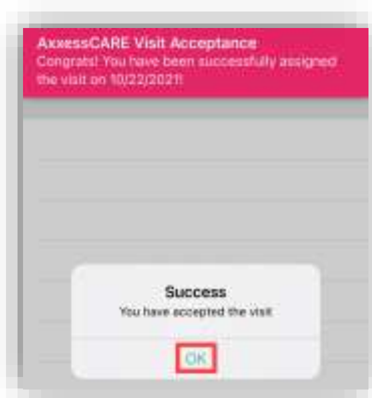
If the organization accepts the application, it will then come back to the user's device. There will be a purple notification bar toward the top of the screen letting the user know to accept the visit. Select the notification bar.



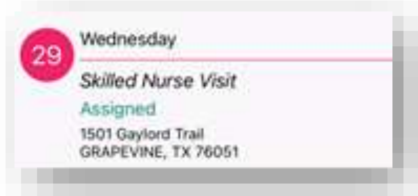
The next page is the Pending Visits screen. There is also a timed limit to accept the visit that is decided per organization. Select the **Accept** button.



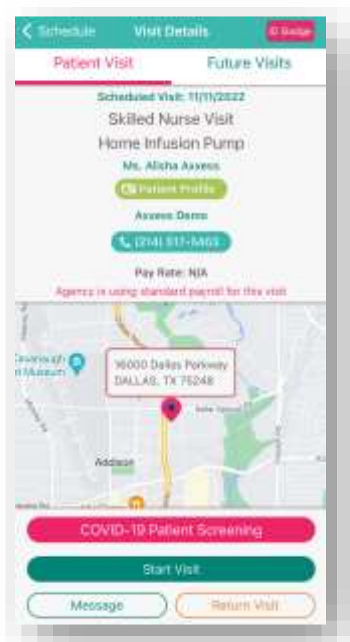
There will be a confirmation that the visit has been accepted. Select **OK**.



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 the **Return Visit** button. Select the **Patient Profile** button to be able to look at the patient chart before starting the visit.

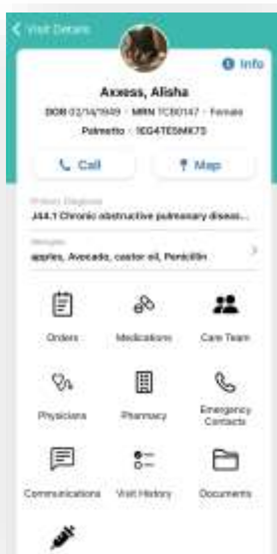


If there is a request to see the user's identification during the visit, select the **Badge** button from the **Visit Details** page.

The following ID badge will display. Select **Done** to close the badge.

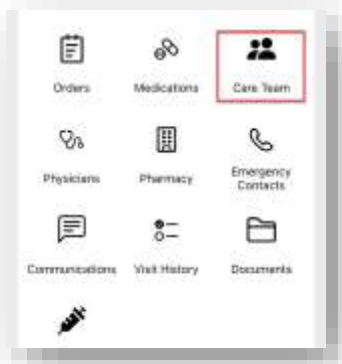
Patient Profile

The following is the Patient Profile. All information shown has been entered through the Axxess Home Health web application. It shows the patient's DOB, MRN, gender and payer.

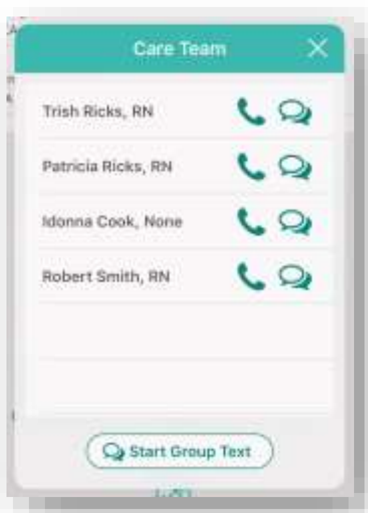


Select **Call** to dial the patient's phone number and **Map** to see the patient's location in the map or direction apps available.

The patient profile also shows the patient's allergies, primary diagnosis, and links to view, edit and/or add to their orders, medications, care team, physicians, pharmacy, emergency contacts, communications, visit history, documents and immunizations. Select the **Care Team** button.

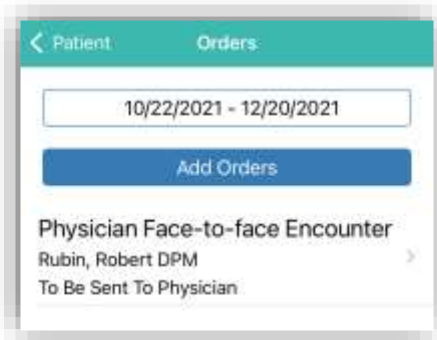


The Care Team window shows all users/clinicians that are tied to this patient. Message team members individually by selecting the message icon or call them by selecting the phone icon. To message the group, select the **Start Group Text** button. Select outside of the window to close or the **X** in the top right.

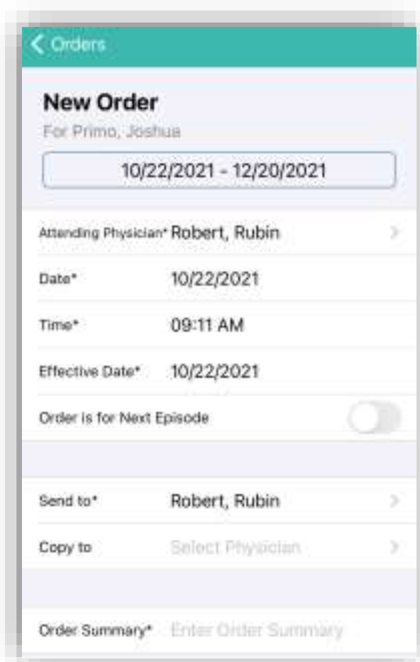


Orders

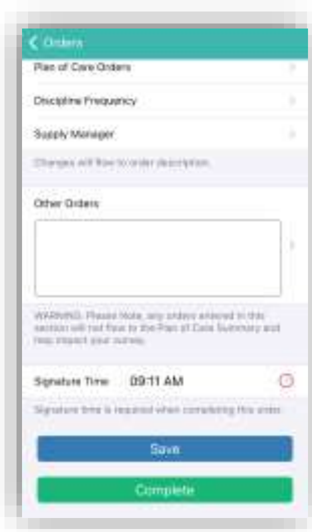
Orders can be added (permissions-based) outside and inside of visits. This can be done outside the visit by going to the patient's profile and going to the Orders section and selecting **Add Orders**.



Confirm the auto-generated attending physician, date, time, and effective date. If the order is for a next episode, slide the toggle. Confirm with the physician that the order will be sent to and any additional physicians that might want a copy. Enter the order summary.



Choose the order type from Medication Orders, Plan of Care Orders, Discipline Frequency, Supply Manager and Other Orders. Users will be prompted to add more specific information to the order, depending on what type is chosen. Confirm the signature time. Select **Save** to keep what has been entered to be completed later or select **Complete** to finish the order.

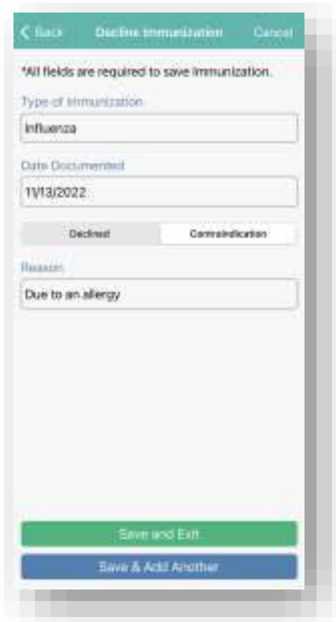


NOTE: Any orders entered in this section will not flow to the Plan of Care Summary and may impact the survey.

Immunizations

Immunizations can be added outside and inside of visits. This can be done outside the visit by going to the Patient Profile and going to the **Immunizations** section and selecting the blue **Add** button. Choose the type, administered by, manufacturer, date administered and whether comorbid condition present. If this is the only immunization being added select the **Save and Exit** button to finish or select **Save & Add Another** to add additional immunizations.

To add declined records from the immunizations page, select the red **Decline/Contraindication** button. Enter the Type, Date documented, whether Declined or Contraindication and the Reason. If this is the only immunization being declined select the **Save & Exit** button to finish or select **Save & Add Another** to add additional declined immunizations.



To inactivate active immunizations listed, swipe the item to the left and there is an option to **Inactivate** or **Delete**.

Confirm the inactivation or deletion and then inactive immunizations will be listed under the Inactive group.

Pharmacies

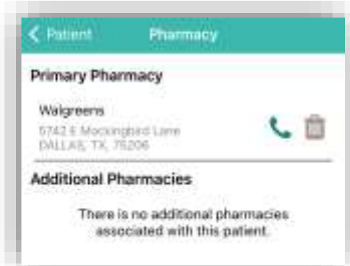
To see the patient's pharmacy list, navigate to the **Pharmacy** section in the patient's profile. If no pharmacies were added previously or by the organization through the Home Health web application, users can add them to the profile or add new pharmacies altogether (permissions based).

Select the **Add Pharmacy** button and search through the Existing Pharmacies list. Select **Add New Pharmacy** to add a new pharmacy to the database.

Enter the information available. The name and phone number are required.

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 on the phone icon. To delete a pharmacy from the list, select the trash can icon.



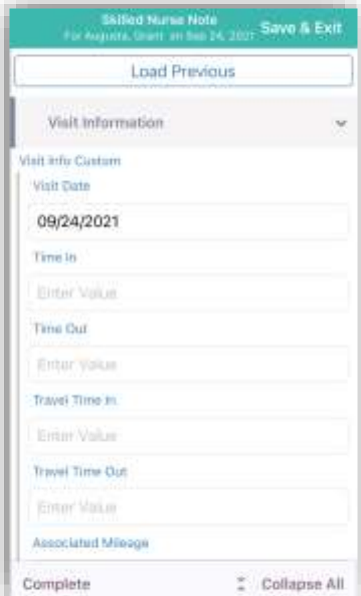
Performing Visit

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

If the user is not near the patient's address, the following warning will display:

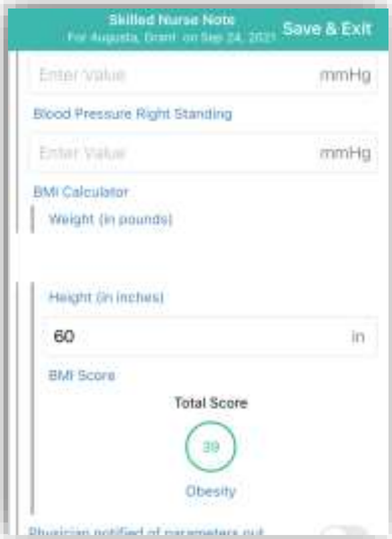
The main menu of the visit is shown below. The following are examples of a skilled nurse note. The visit is split into sections that can be expanded or collapsed. When categories are expanded, the arrow to the right will be facing downward. Select **Collapse All** in the bottom right to minimize all categories.

Required questions will have either a red asterisk* or it will be written as "At least one response is required" or "Must have answer."



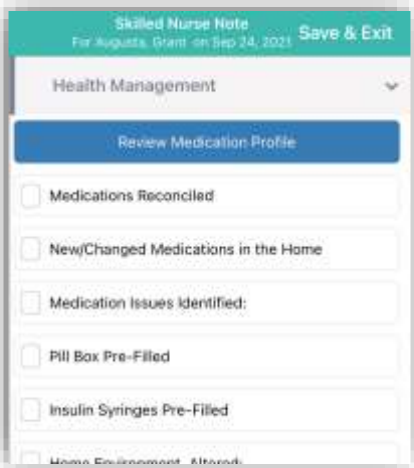
When completing a visit note, users can load previous documents by selecting **Load Previous** at the top of the current note and selecting a previous note from the drop-down menu. The last five completed visit notes of the same type will populate in the drop-down menu. Once a previous visit note is selected, the current note's fields will populate with data from the selected visit note. All fields will remain editable for the clinician to adjust as needed.

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 will show (green text in the circle), depending on the test, their score might put the patient in a group. The following example shows that based on the weight and height, the patient's score indicates obesity.



Medications

To add medications during a visit, go to the Health Management category and select the **Review Medication Profile** button.



NOTE: The functionality of adding a medication works the same outside of the visit in the Patient Profile.

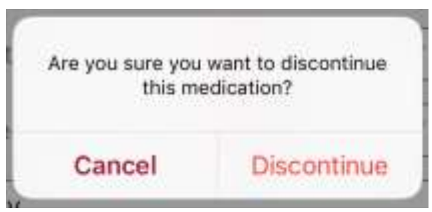
Inside the Medication Profile, select **Add New Medication**. Then search for the medication in the text box. Once found, select the medication.

Write in the amount, select the physician, classification and routes from their corresponding drop-down menus. Select the tab whether the medication is **New**, **Changed** or **Unchanged**. Move the slider if it is a Long-Standing Medication. Select a Start Date and Date Through. Write in the frequency, then move the slider depending on whether the medication needs to be added as new through an order or a current one found in the home. Once completed, select the **Done** button unless there are additional medications, then select **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 in the color of severity at the top of the page. Select the **Warning**. Then select the combination of medications that are conflicting to read more. Select **Back** in the top left to go back to the medication profile.

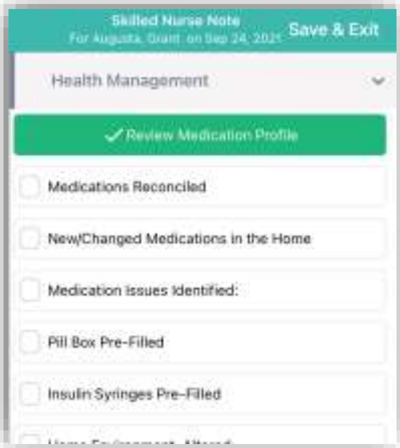
NOTE: Interactions are only run for medications currently listed in the Axxess Home Health database.

Once a medication has been entered, edit by selecting the name of the medication. Scroll to the bottom of the page to **Delete** (added in error) or **Discontinue** (patient is no longer taking this medication). After Discontinue is selected, confirm by selecting **Discontinue** again. It will then be listed in the Discontinued section of the medication profile.



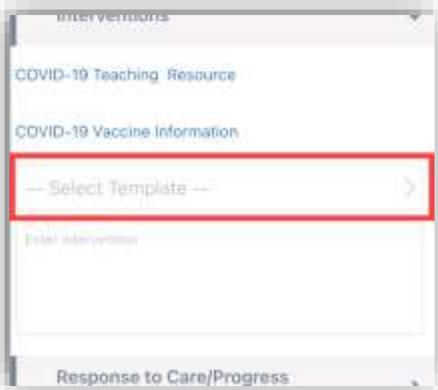
Once finished with the medication reconciliation, select the **Sign Medication Profile** button to verify medications have been clinically reviewed. Sign with a finger or stylus above the line after the X. When completed, select **Done**.

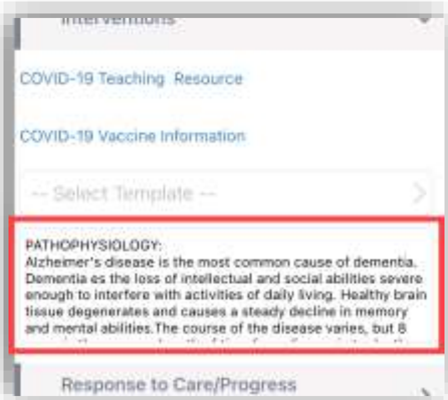
Once reviewed, the medication profile button will change from blue to green.



Templates

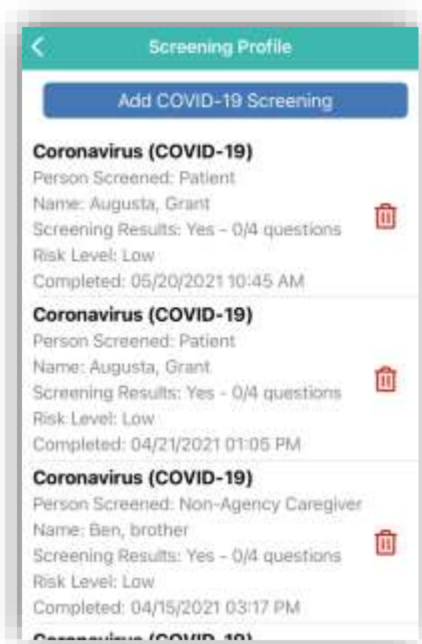
When completing documentation, users can select a template from the **Templates** menu to populate the template's text in the associated text field for patient teaching and seamless point-of-care documentation.



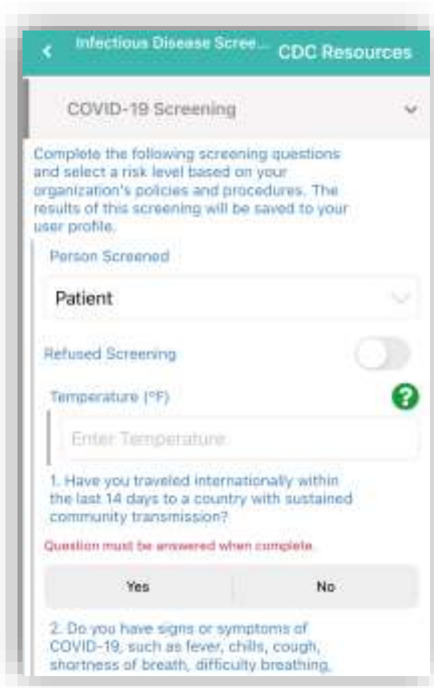


COVID-19 Screenings

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 the **Add COVID-19 Screening** button.



Choose the person screened and enter their name and relationship. 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.

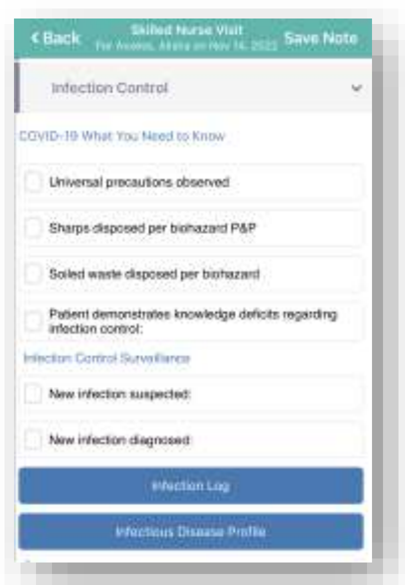
When all the screening fields are complete, select the Screening Acknowledgment slider. The electronic signature will auto-generate based on the time the form was opened.

Logs

Incident logs can be accessed and documented from a SN Note, PT Visit, OT Visit or ST Visit on the mobile app. To create an incident log from a Skilled Nurse Note, navigate to the Care Coordination category and select the **Add Incident Log**.

Once documentation is entered in the Follow-Up section, the incident log can be signed and completed. A PDF version of the incident log can be accessed from the patient's chart. When submitted with a signature, the log will go to QA.

Infection logs can be accessed and documented from an OASIS, SN Visit, PT Visit, OT Visit or ST Visit on the mobile app. To create an infection log from a Skilled Nurse or PT/OT/ST Visit, navigate to the Infection Control category and select **Infection Log.**



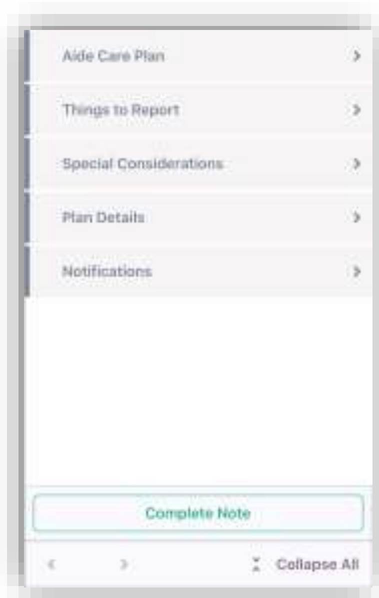
Complete the sections listed.

Once documentation is entered in the follow-up section, the infection log can be signed and completed. The saved log will appear in a report for infections that require a follow-up. Completed reports will appear in a report for infections.

Aide Care Plan

When documenting an OASIS or Skilled Nurse Visit on the mobile app, clinicians can add and document an Aide Care Plan. To document an Aide Care Plan from a skilled nurse visit, navigate to the **Supplemental Documents** section and select **Add/Edit Aide Care Plan.**

The following tabs appear on the Aide Care Plan.

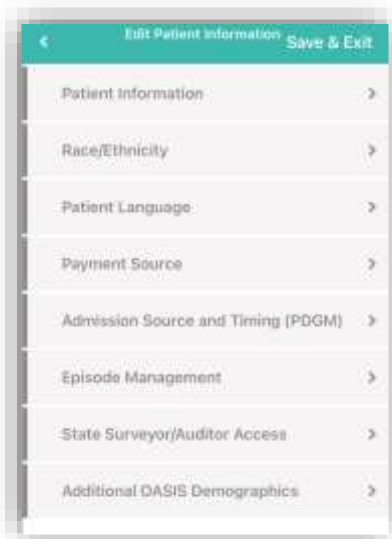


The signature date and time fields pre-populate with the current date and time and can be edited as needed. When **Complete Note** is selected, the Aide Care Plan will appear in the Schedule Center in “Pending OASIS Approval” status. The Aide Care Plan will then flow to the QA Center to be approved. Once the Aide Care Plan and OASIS have been approved in QA, the care plan can be linked to scheduled aide notes.

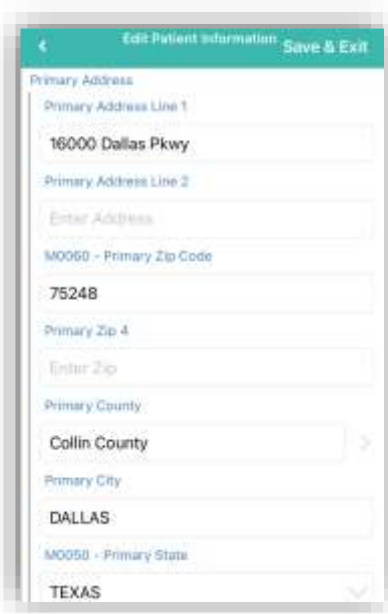
OASIS

Edit Patient Info

To edit a patient’s information at the point of care, navigate to the **Demographics** category and select **Edit Patient Information.**

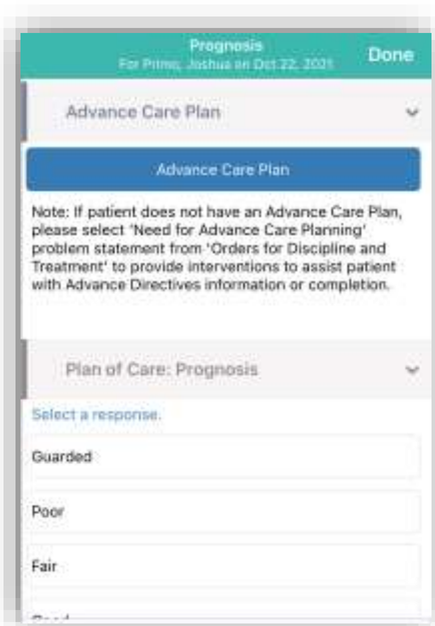


The page will open and display the following information captured at intake. Required fields will appear with asterisks. Update the information on this page as needed. Users will have the opportunity to enter a mailing and visit address for the patient. Select **Save & Exit** in the top right to finish updates.



Advance Care Plan

When completing an OASIS assessment, an **Advance Care Plan** section appears in the **Prognosis** category. Users can select the **Advance Care Plan** button in this section to document advance care planning while in the OASIS.

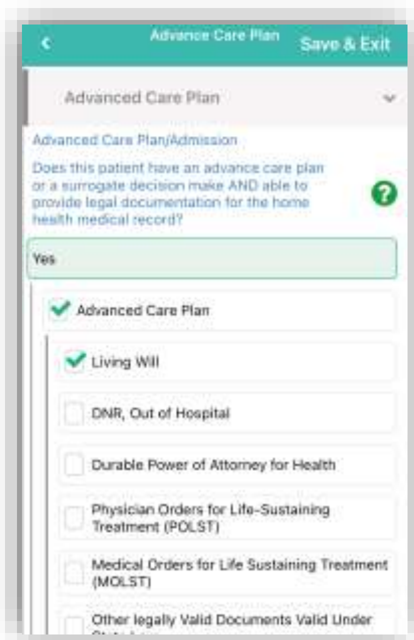


Once **Advance Care Plan** is selected, seven options for advance care planning will appear:

- Advance Care Plan

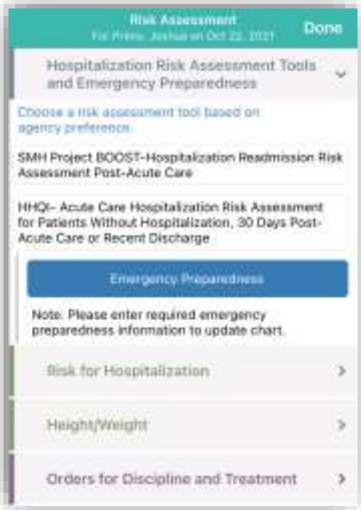
- Living Will
- DNR, Out of Hospital
- Durable Power of Attorney for Health (a text box for Name and Relationship opens)
- Physician Orders for Life-Sustaining Treatment
- Medical Orders for Life-Sustaining Treatment
- Other Legal Documents Valid Under State Law

Users can also document four options for treatment preferences. At the bottom of the screen, a Comments text box is available for users to enter any additional information.



Emergency Preparedness

To document emergency preparedness information from a comprehensive assessment, navigate to the **Risk Assessment** category and select **Emergency Preparedness.**

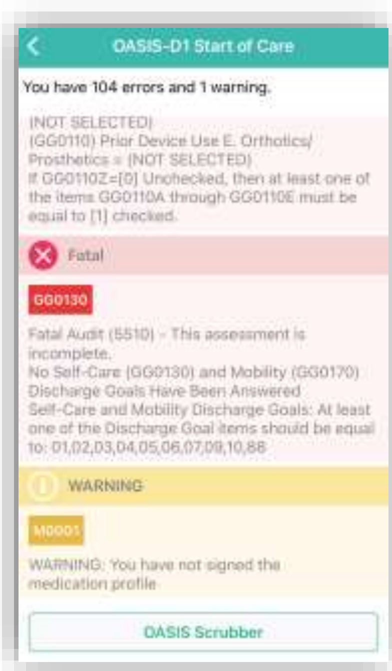


The following tabs appear under **Emergency Preparedness.**

Select **Save and Exit** to return to the assessment when documentation of emergency preparedness details is finished. The emergency preparedness will change to green with a check mark to confirm completion.

Scrubber

The OASIS scrubber can be used to audit OASIS assessments for clinical inconsistencies, coding inconsistencies, fatal audits, and CMS warnings, so clinicians can correct any errors and maintain accurate OASIS documentation. Once an OASIS is completed on the app, select the **Check for Errors** button to run an OASIS audit. Once the audit is completed, the **OASIS Scrubber** button will appear at the bottom of the assessment.

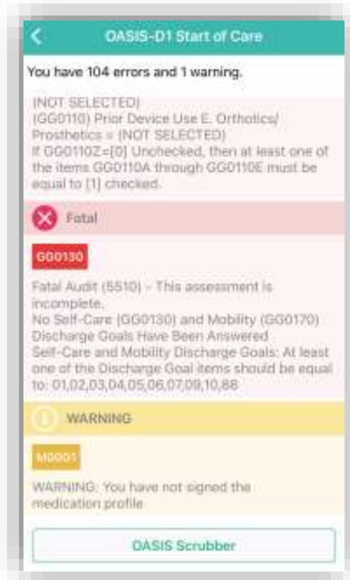


Select the **OASIS Scrubber** button to open and review a PDF of the findings. Select **Back** in the top left to get back to the errors/warnings.

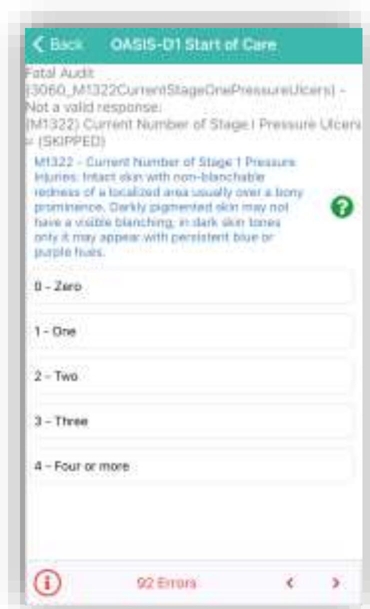
Audit and Signature

The app enables users to audit, sign, complete and submit OASIS assessments at from the 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 select

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.

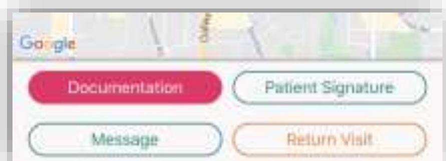


Once all errors have been corrected, the HHRG and case-mix calculations will appear. The expected payment amount will also appear for users with the appropriate permissions. The signature page will be available once **Save & Sign** is selected. The page will include all options available on the web signature page. Select **Save & Exit** once all steps have been completed. OASIS assessments cannot be submitted until an audit is completed.

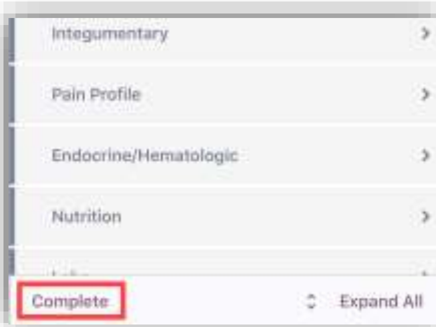
Completing Visit

To leave the visit and save progress, select **Save Note** in the top right of the visit menu.

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



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

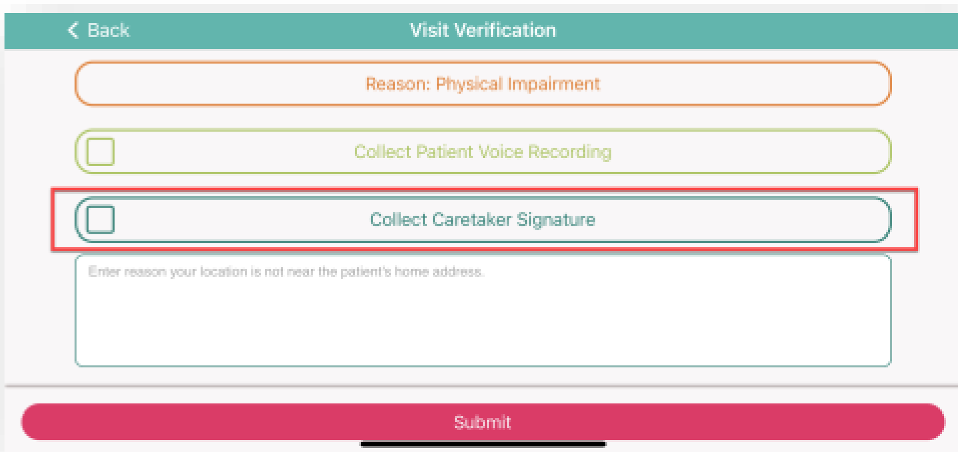


Confirm the signature date, enter the signature time, then select **Complete**.

This is when the Electronic Visit Verification process begins. If the patient is not able to sign, choose **Select Unable to Sign Reason** and choose the reason why they are not able to sign from the following options:

- Physical Impairment
- Mental Impairment
- Other (must indicate other reason)
- Unable to collect Patient's Signature

After Selecting a reason, the user will then see the options to **Collect Caretaker Signature** or **Collect Voice Recording**.

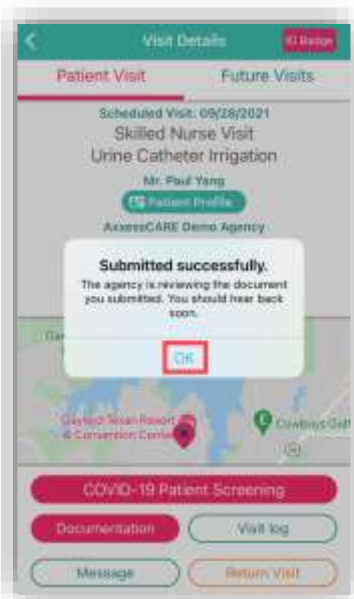


Once caregiver signature is obtained, select **Done** in the top right corner.

If the client can sign for themselves, select the **Collect Patient Signature** button.

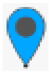
The patient is then prompted to enter their signature. Either sign with a finger or use a stylus. When finished, select **Done** in the top right.

A completion confirmation will display along with instruction that the organization's QA department will be reviewing the visit. Select **OK**.



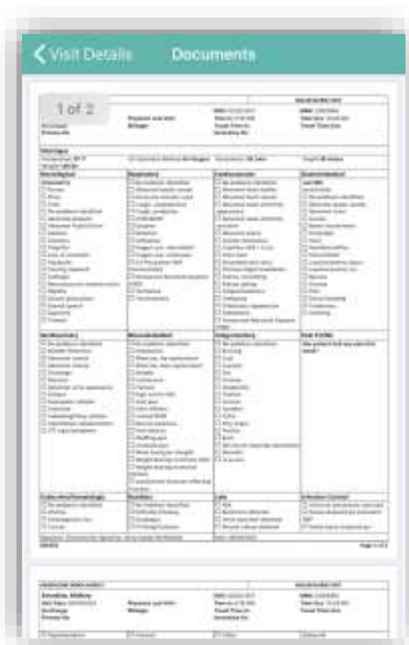
On the Visit Details page, to see the Electronic Visit Verification, select **Visit Log**. The Visit Verification page shows the Verified Time In & Out and the Signature along with the:

 – Patient Address

 – Visit Started Location

 – Visit Ended Location

Select **Back** in the top left to get back to the schedule. From Visit Details, select **View Documents**. This shows the PDF printed version of the completed visit. Select **Visit Details** to go back.



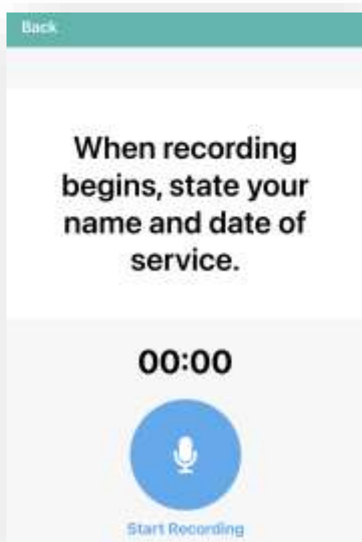
NOTE: EVV time in and out will not automatically pull to visit notes. Time in and time out must be documented inside visit note.

Patient Voice Recording

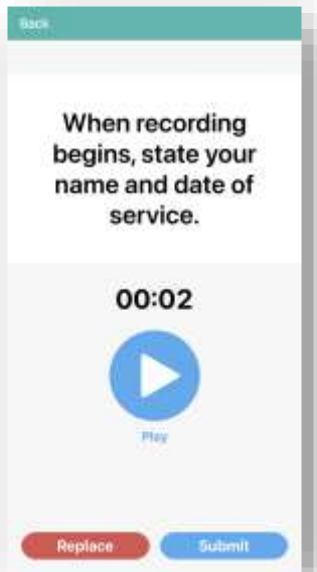
Users can collect a patient voice recording after selecting **Patient Unable to Sign**. When a patient cannot provide a signature to verify services, select **Patient Unable to Sign** and select the reason that a patient signature cannot be obtained. After specifying a reason, select **Collect Patient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

Select **Start Recording** and instruct the patient to state their name and the date of service.

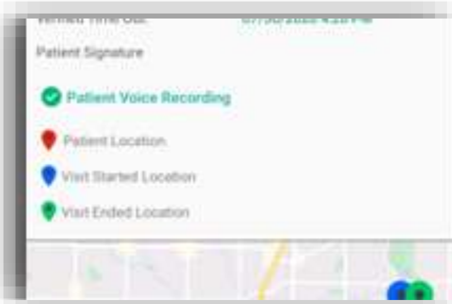
Select **Stop Recording** to end the recording once the patient has stated their name and the date of service. The recording will stop automatically if not ended before 30 seconds.



Select **Play** to play the recording. Select **Replace** to re-record or **Submit** to submit 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.

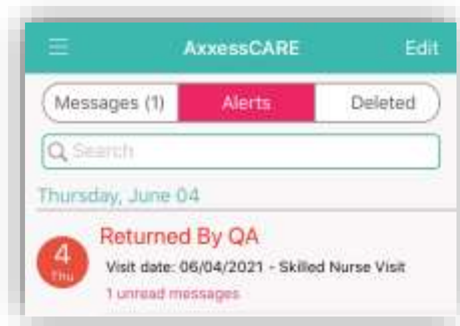


Once the visit is complete, the patient voice recording is saved and stored on the Electronic Visit Verification (EVV) Log screen.

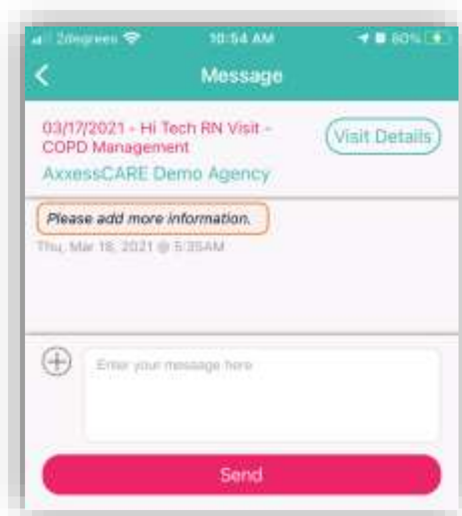
QA Returned

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/alert to view.



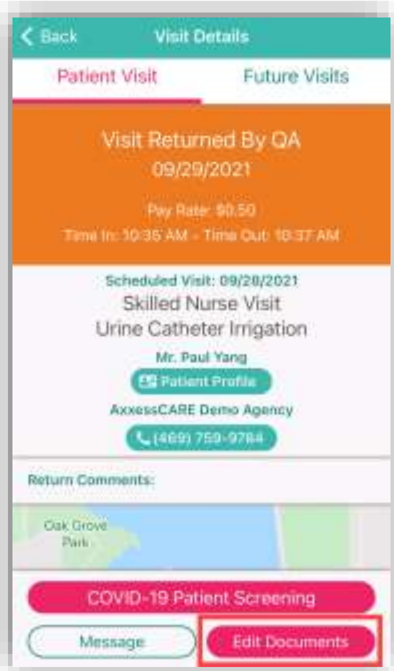
The message from the QA staff is listed in orange.



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, which will return to the visit. Make requested updates inside the visit, complete again and re-sign.

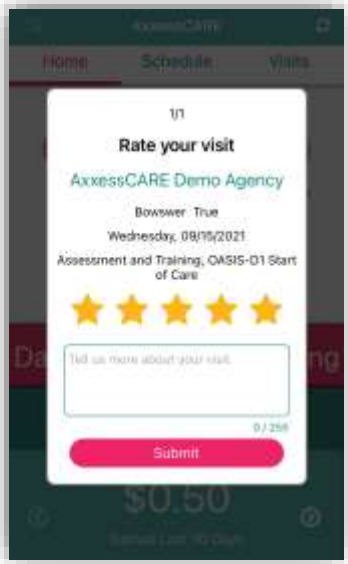


Paid

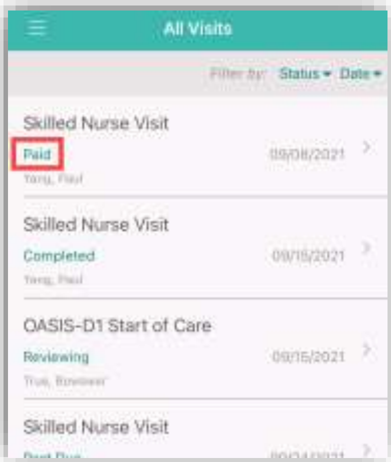
Once the visit has been reviewed, approved and/or co-signed by the organization, the following notification will appear:

The next time logging into Axxess CARE, the system will prompt for a review of the organization.

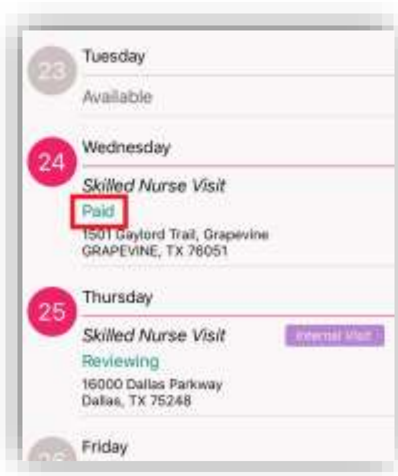
Select the star rating to give for the visit. The stars will change to yellow and the **Submit** button becomes active.



The status of the visit will update to Paid. The paid visit will now be housed in the **All Visits** section. Select the visit to view the details.



The visit details page shows the updated status, as well as 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.