

HOME CARE ORDERS MANAGEMENT TRAINING MANUAL

December 2022

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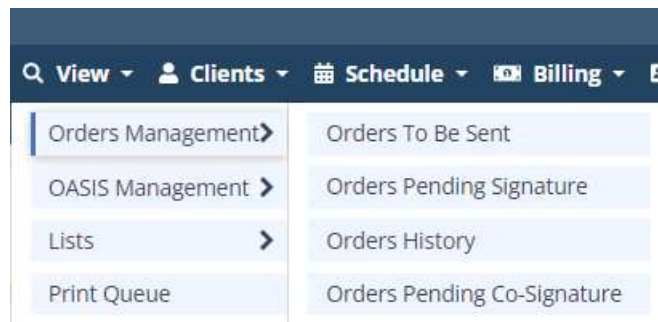
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ORDERS MANAGEMENT OVERVIEW

View/Orders Management

Orders Management is where approved orders are processed to and from the physicians. You can access Orders Management through the menu bar. The Orders Management center is where users can access sub-menus that include:

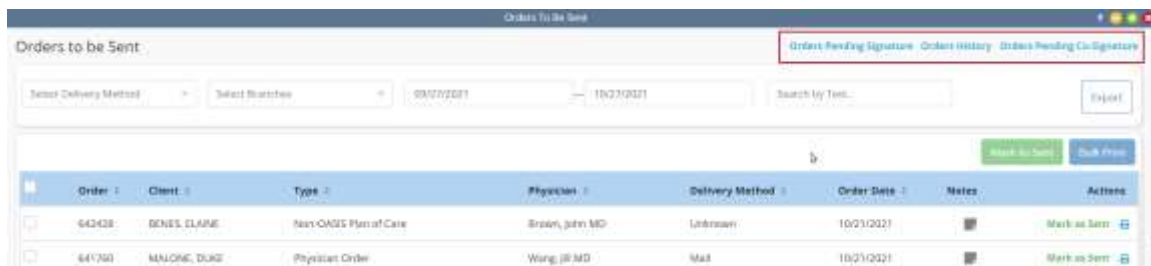
- Orders To Be Sent
- Orders Pending Signature
- Orders History
- Orders Pending Co-Signature




Links in Orders Management

To view the Orders Management screens, navigate to the **View** tab, hover over Orders Management and select **Orders to Be Sent**, **Orders Pending Signature**, **Orders Pending Co-Signature** or **Orders History**.


Navigation links now appear in the top-right corner of each screen. Users can click these links to navigate to the corresponding pages.



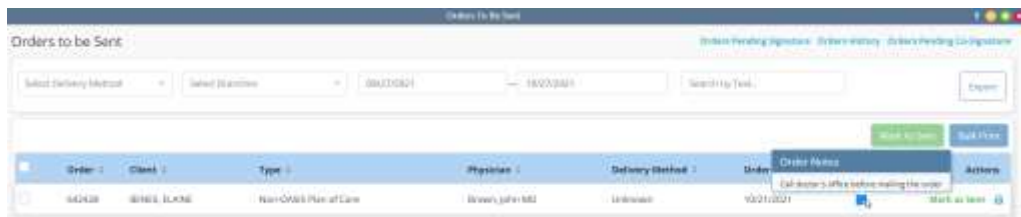
Orders Management Notes


To enter notes for an order, click the note icon  in the notes column. To enter a new note, click **Add Note**, type in the text box and click **Save & Close** or **Save & Add Another**.

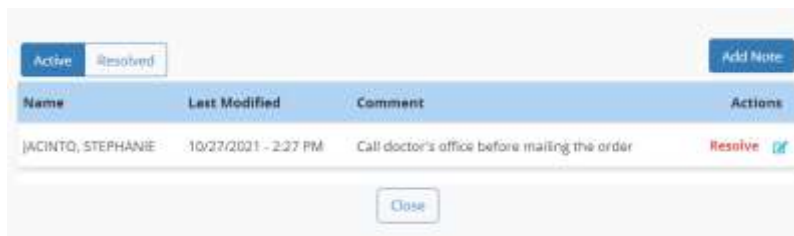


Once a note has been entered, the note icon will turn blue. 

Hover over the blue note icon to view the notes entered. Up to three notes can be viewed when hovering over the icon. To view additional notes, click the note icon.



To edit a note, select . To resolve a note, select **Resolve**.



To view all resolved notes, click the resolved filter. The note icon will turn green once resolved.

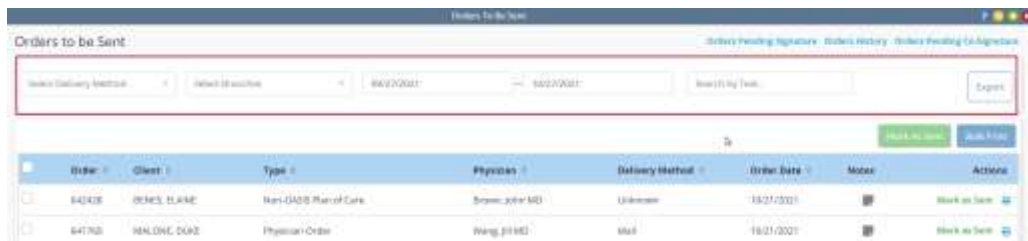
ORDERS TO BE SENT

View/Orders Management/Orders to be Sent

The Orders to be Sent screen will populate the items ready to be sent to the physician manually (fax, mail, deliver).

Within the orders sent screen, sort and filter by the items below.

- Delivery Method - Defaults to all. Choose between Axxess Physician Portal, fax, other and mail.
- Branch - Filter by location/branch (if more than one).
- Date Range - Defaults to the last 60 days from the current date. The date range may be changed. To update the orders displaying, select **Refresh**.
- Filter by Text - Allows the user to search the table by any data listed - order number, patient, type etc.
- Export - This function allows the generated list to be exported to Excel for further analysis.



Order	Client	Type	Physician	Delivery Method	Order Date	Status	Actions
642438	DEANES, ELAINE	Non-QAD3 Plan of Care	Brown, John MD	Unknown	12/27/2021	📄	Mark as Sent
647780	NEALONE, DEAN	Physician Order	Wang, JIN MD	Mail	12/21/2021	📄	Mark as Sent

Once the order list is generated, it may be sorted by any of the column headers, order, client, type, physician, delivery method, or order date.

NOTE: For Forcura subscribers, when Other is selected as a physician's order delivery method, orders sent to the physician will automatically flow to the Other category on the Forcura dashboard for enhanced tracking and archiving.

For Axxess Home Care users that do not subscribe to Forcura, when Other is selected as a physician's order delivery method, the physician's orders in Axxess Home Care will move to the To Be Sent screen until manually processed by the user.

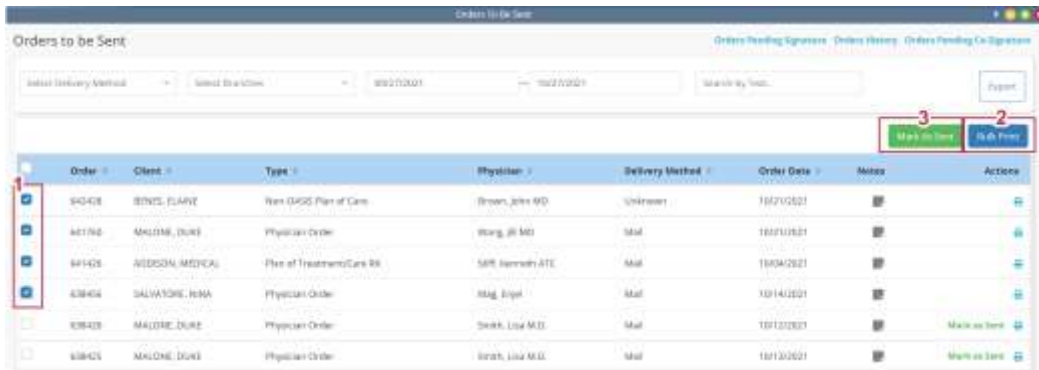
Printing and Marking Orders as Sent

- Individual orders may be printed by selecting the 🖨️ icon in the right column.

- Multiple orders may be printed by using the bulk print feature. Simply select the orders the user wishes to print. Then select **Bulk Print**. The list of orders will be queued in *Reports/Completed Reports*.

Once the orders are printed, the user updates the orders by selecting **Mark as Sent**. Orders marked as sent to physician move to the Orders Pending Signature submenu. The order is also updated to a “Sent to Physician” status in the Client Chart.

NOTE: If using Bulk Print, minimize the page until the user chooses to print the orders, then open the page and select **Mark as Sent**. All the orders selected for the bulk print will still be checked.



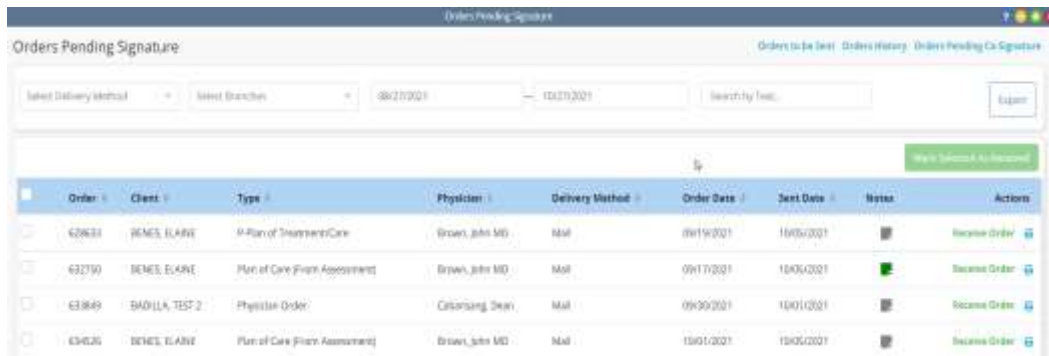
ORDERS PENDING SIGNATURE

View/Orders Management/Orders Pending Signature

This menu is used to track outstanding orders and mark as received. The default date range is 60 days back from the current date.

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

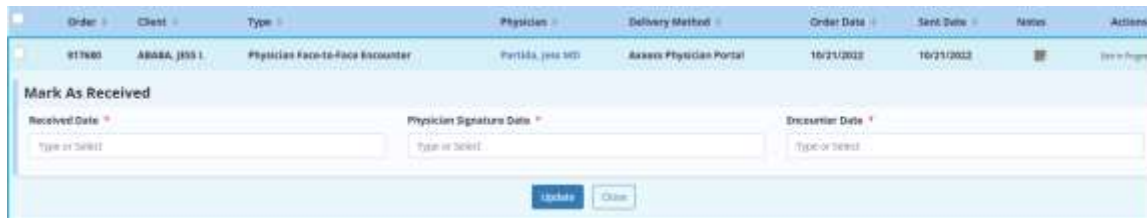
Any of the columns may sort the list: Order, client, type, physician, delivery method, order date or sent date.



Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Notes	Actions
62833	BENES, ELAINE	P-Plan of Treatment/Care	Brown, John MD	Mail	09/19/2021	10/05/2021		Receive Order
62790	BENES, ELAINE	Plan of Care (From Assessment)	Brown, John MD	Mail	09/17/2021	10/05/2021		Receive Order
63849	BAOILLA, TEST 2	Physician Order	Chabernang, Dean	Mail	09/09/2021	10/01/2021		Receive Order
63626	BENES, ELAINE	Plan of Care (From Assessment)	Brown, John MD	Mail	10/01/2021	10/05/2021		Receive Order

Receiving Orders

Individual orders may be received by selecting **Receive Order** in the right-hand column of the order. A pop-up will display to enter the received date, physician signature date, and encounter date. Once completed, select the **Update** button.



Mark As Received

Received Date:

Physician Signature Date:

Encounter Date:

Select multiple orders at one time to mark as received. Select the applicable orders on the left-hand side and select **Mark Selected as Received**. A pop-up will display to confirm the received date and physician signature date. These dates auto-generate to the current date. Once completed, select the **Mark** button.



Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Notes	Actions
62833	BENES, ELAINE	P-Plan of Treatment/Care	Brown, John MD	Mail	09/19/2021	10/05/2021		Receive Order
62790	BENES, ELAINE	Plan of Care (From Assessment)	Brown, John MD	Mail	09/17/2021	10/05/2021		Receive Order
63849	BAOILLA, TEST 2	Physician Order	Chabernang, Dean	Mail	09/09/2021	10/01/2021		Receive Order
63626	BENES, ELAINE	Plan of Care (From Assessment)	Brown, John MD	Mail	10/01/2021	10/05/2021		Receive Order

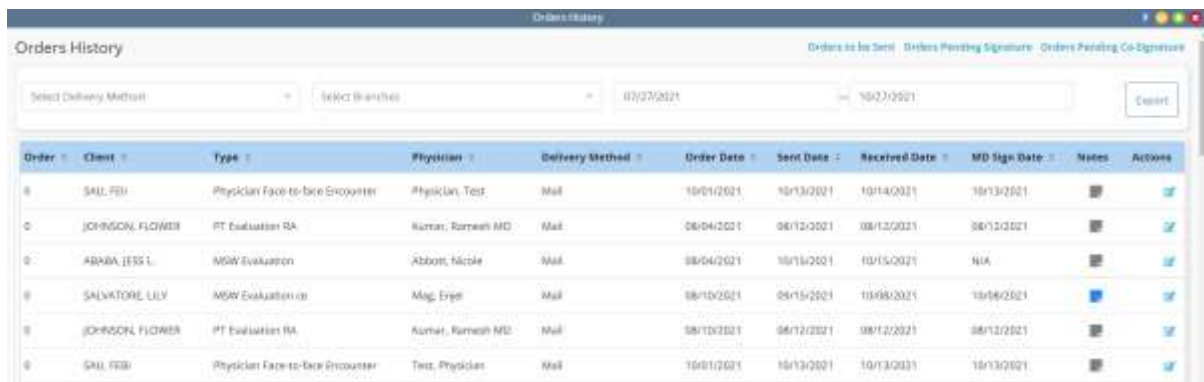
Once an order is marked as received, it moves to the Order History screen. The order will also be updated in the patient chart to indicate "Returned W/ Physician Signature."

ORDERS HISTORY


View/Orders Management/Orders History

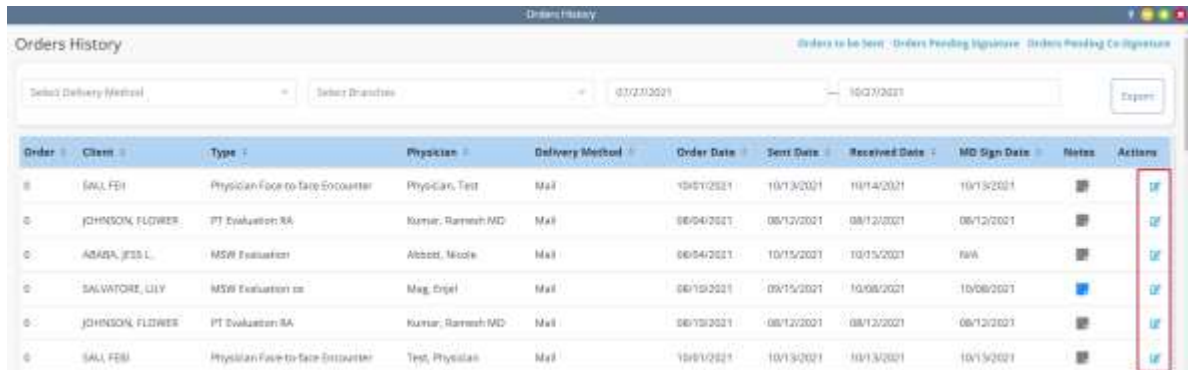
Once an order is marked as received, it moves from the Pending Signature screen to the Orders History screen. The order also updates to “Returned W/ Physician Signature” in the Client chart.

- **Delivery Method** - Defaults to all. Choose between Axxess Physician Portal, fax, other and mail.
- **Branch** - Filter by location/branch (if more than one).
- **Date Range** - Defaults to the last 60 days from the current date. The date range may be changed. To update the orders displaying, select **Refresh**.
- **Export** - This function allows the generated list to be exported to Excel for further analysis.
- Selecting a column title will sort the list by that heading.



Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Notes	Actions
8	SALL FBI	Physician Face-to-Face Encounter	Physician, Test	Mail	10/01/2021	10/13/2021	10/14/2021	10/13/2021		
0	JOHNSON, FLOWER	PT Evaluation RA	Kumar, Ramesh MD	Mail	06/04/2021	06/12/2021	06/12/2021	06/12/2021		
0	ARABA, JESS L.	MSW Evaluation	Abbott, Nicole	Mail	08/04/2021	10/15/2021	10/15/2021	N/A		
8	SALVATORE, LILY	MSW Evaluation	Mag, Orjel	Mail	08/19/2021	09/15/2021	10/08/2021	10/08/2021		
8	JOHNSON, FLOWER	PT Evaluation RA	Kumar, Ramesh MD	Mail	06/10/2021	06/12/2021	06/12/2021	06/12/2021		
8	SALL FBI	Physician Face-to-Face Encounter	Test, Physician	Mail	10/01/2021	10/13/2021	10/13/2021	10/13/2021		

If the order sent date, received date or MD sign date was entered incorrectly, corrections can be made by selecting the  in the Actions column. Upon selection, a pop-up window appears, allowing updates to one or all the dates.



Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Notes	Actions
8	SALL FBI	Physician Face-to-Face Encounter	Physician, Test	Mail	10/01/2021	10/13/2021	10/14/2021	10/13/2021		
0	JOHNSON, FLOWER	PT Evaluation RA	Kumar, Ramesh MD	Mail	06/04/2021	06/12/2021	06/12/2021	06/12/2021		
0	ARABA, JESS L.	MSW Evaluation	Abbott, Nicole	Mail	08/04/2021	10/15/2021	10/15/2021	N/A		
0	SALVATORE, LILY	MSW Evaluation	Mag, Orjel	Mail	08/19/2021	09/15/2021	10/08/2021	10/08/2021		
0	JOHNSON, FLOWER	PT Evaluation RA	Kumar, Ramesh MD	Mail	06/10/2021	06/12/2021	06/12/2021	06/12/2021		
8	SALL FBI	Physician Face-to-Face Encounter	Test, Physician	Mail	10/01/2021	10/13/2021	10/13/2021	10/13/2021		

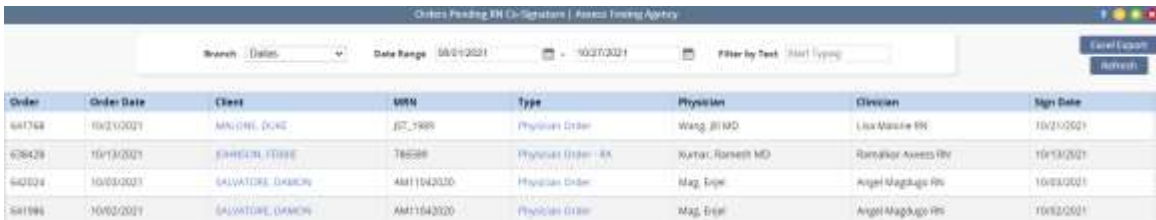
Selecting **Update** will save the changes and **Close** will discard any changes to the record.



ORDERS PENDING CO-SIGNATURE

View/Orders Management/Orders Pending Co-Signature

User permissions allows the organization to set up specific users to require co-signature on all orders. Users can filter for branch, date range, as well as search for a patient name. Selecting a column title will sort the list by title. Select **Refresh** once filters have been updated. The information can also be exported to Microsoft Excel for further analysis by selecting **Excel Export**.



Order	Order Date	Client	MRN	Type	Physician	Clinician	Sign Date
641748	10/21/2021	MAN, OWL, DORIS	827_5988	Physician Order	Wang, JI HAO	Lisa Maslow RN	10/21/2021
628428	10/13/2021	SHREVE, FRISBE	785588	Physician Order - RX	Kumar, Rakesh MD	Ramajay Axxess RN	10/13/2021
642824	10/03/2021	SALVATORE, DAMON	AM11643020	Physician Order	Mag, ERIK	Angel Magdugo RN	10/03/2021
641984	10/03/2021	SALVATORE, DAMON	AM11643020	Physician Order	Mag, ERIK	Angel Magdugo RN	10/03/2021

Both the **Client Name** and **Type** items listed are hyperlinks.

The **Client Name** hyperlink navigates the user to the *Clients/Client Center* while the **Type** hyperlink opens the order for review and ability to **Co-Sign** the note, **Return** to the caregiver, **Download**, **Print** or **Close**.

Axxess Testing Agency 16000 Dallas Parkway suite 700 DALLAS, TX, 75248-9899 Phone: (214) 575-7711 Fax: (789) 797-7979		PHYSICIAN ORDER	
Client Name: Johnson, Ryan L. 16000 Dallas Pkwy Dallas, TX, 75248-7524 (214) 111-1111		Physician: KUMAR, RAMESH 3 Plaza Drive Suite 16 Toms River, TX, 08757 Phone: (732) 505-2888 Fax: (732) 505-2850 NPI: 1114000114	
MRN: 22222 DOB: 01/13/1952		Order Date: 07/31/2020 05:30 PM Order #: 441855 Care Period: 07/31/2020 - 08/29/2020	
Allergies: New Added, Cough, Allergy Added, New Summary: RA -Order			
PEMIGATINIB 13.5 MG ORAL TABLET Twice/day By mouth (PO)			
<input type="button" value="Co-Sign"/> <input type="button" value="Return"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="Close"/>			

After **Co-Sign** is selected, a confirmation box will appear. Enter the clinician's co-signature & clinician's co-signature date (auto-generates to today). Select either **Co-Sign** or **Co-Sign and Approve** based on permissions and the organization's policy. If **Co-Sign** is selected, the order will flow to the QA Center for approval. If **Co-Sign and Approve** is selected, the order bypasses the QA Center and gets approved.

Co-Signature * = Required Field

Order Number: 638428

Client Name: JOHNSON, RYAN L.

Created Date: 10/13/2021

Clinician Co-Signature:

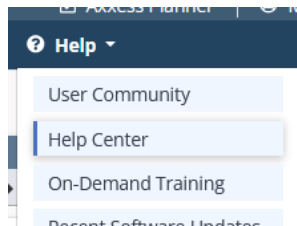
Clinician Co-Signature Date: 10/27/2021

Clinician Co-Signature Time: 02:48 PM

HELP CENTER

Help/Help Center

A great resource that is available 24/7 is our Help Center. It is a place to get answers to frequently asked questions or watch videos of all of Axxess' products. It can be accessed by going to:



Or also available at <https://www.axxess.com/help/>

