

HOME CARE OFFICE STAFF (INTAKE AND SCHEDULING) TRAINING MANUAL

December 2022

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LOGGING INTO AXXESS

To access Axxess Home Care, open the Internet browser (Chrome and Firefox recommended) and type in the address www.axxess.com. When the home screen appears, select the **LOGIN** button at the top right of the webpage.



The login page will appear where the username and password fields are required. The username is the email address associated with the Axxess Home Care user account. Once the username and password are entered, select **Secure Login** to enter Axxess' software.

A screenshot of the Axxess login page. At the top is the Axxess logo. Below it are two input fields: 'Email address' and 'Password'. A red error message 'This field is required' is visible next to the 'Email address' field. Below the fields are links for 'Remember Me' and 'Forgot your Password?'. A large red 'Secure Login' button is centered at the bottom. At the very bottom, there is a small copyright notice: 'Axxess | Copyright © 2009 - 2018 | All Rights Reserved | Dallas, Texas'.

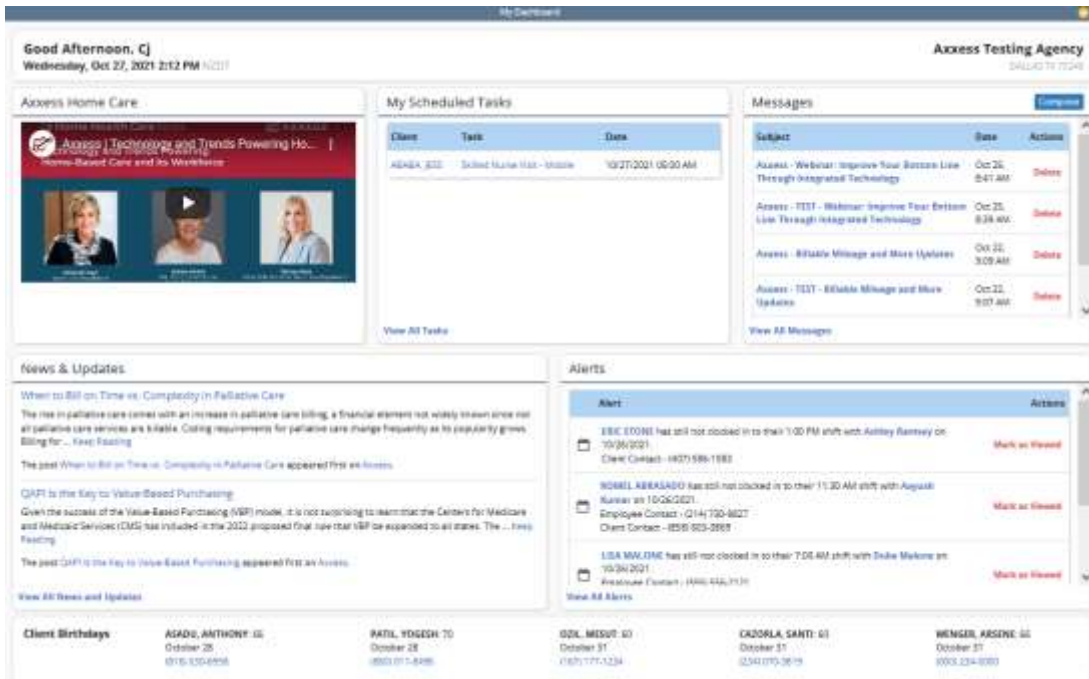
NOTE: To reset the password, see the overview.

After successfully logging in, a user acceptance message will display. Select **OK** to accept the message or **Cancel** to exit the application.

A screenshot of a user acceptance message dialog box. It features the Axxess logo at the top. The title is 'Login Successful'. The main text reads: 'This system and all its components and contents collectively, the "system" are intended for authorized business use only. All data within is considered confidential and proprietary. Unauthorized access, use, modification, destruction, disclosure or copy of this system is prohibited and will result in prosecution. Click OK to continue.' At the bottom, there are two buttons: 'Cancel' (red) and 'OK' (green). At the very bottom, there is a small copyright notice: 'Axxess | Copyright © 2009 - 2017 | All Rights Reserved | Dallas, Texas'.

The Axxess Planner will appear. Select the organization's Axxess Home Care application on the left side of the page to perform the intake and scheduling processes.

DASHBOARD



My Dashboard
 Good Afternoon, CJ
 Wednesday, Oct 27, 2021 2:12 PM EDT
 Axxess Testing Agency

Axxess Home Care

My Scheduled Tasks

Client	Task	Date
ADANA, JILL	Schedule Nurse Visit - Intake	10/27/2021 09:00 AM

Messages

Subject	Date	Actions
Axxess - Webinar: Improve Your Bottom Line Through Integrated Technology	Oct 26, 8:41 AM	Delete
Axxess - TEST - Webinar: Improve Your Bottom Line Through Integrated Technology	Oct 25, 8:38 AM	Delete
Axxess - Reliable Mileage and More Updates	Oct 25, 3:09 AM	Delete
Axxess - TEST - Reliable Mileage and More Updates	Oct 25, 3:07 AM	Delete

News & Updates

Alerts

Alert	Actions
ERIC EDONE has still not clocked in to their 7:00 PM shift with Anthony Ramsey on 10/26/2021 Client Contact - (807) 586-1888	Mark as Viewed
WOMEL ABRASADO has still not clocked in to their 11:30 AM shift with Augusto Ruman on 10/26/2021 Employee Contact - (214) 720-8027 Client Contact - (214) 923-2929	Mark as Viewed
LISA MULLINE has still not clocked in to their 7:00 AM shift with Debra Malone on 10/26/2021 Employee Contact - (440) 442-1131	Mark as Viewed

Client Birthdays

ASADI, ANTHONY, JR. October 28 (978) 320-6466	PAUL, YOGESH TO October 28 (800) 671-8486	OSIL, MISSIE, GJ October 31 (167) 777-1234	CAZORLA, SANTI, GJ October 31 (234) 075-3819	WENZEL, ARSONE, GJ October 31 (603) 234-0000
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The dashboard can display six tiles.

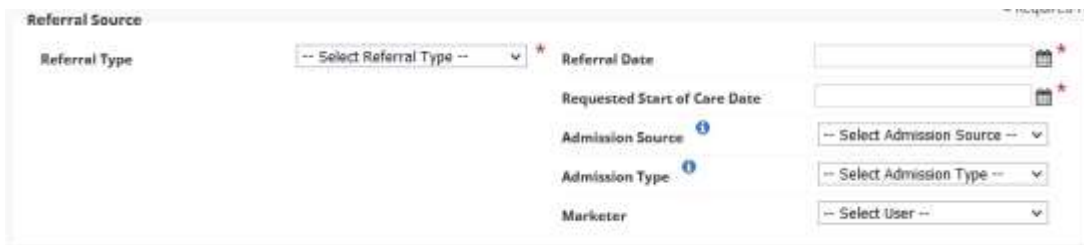
1. Welcome Panel - Items for subscribers to access Axxess products.
2. My Scheduled Tasks - Electronic "To-Do" list. Users can quickly access a client chart and/or tasks for the first five clients on their to-do list.
3. Messages - HIPAA compliant messaging center. When the user receives messages, notifications will be sent to the user's email assigned to their account.
4. News and Updates - Links to Axxess generated blog posts, educational articles, regulatory updates and other important information.
5. Alerts - Provides direct access to important alerts.
6. Client Birthdays - This is a quick reminder of the clients who will celebrate birthdays in the upcoming week/month.

REFERRAL ENTRY

Create/Referral/Medical Referral

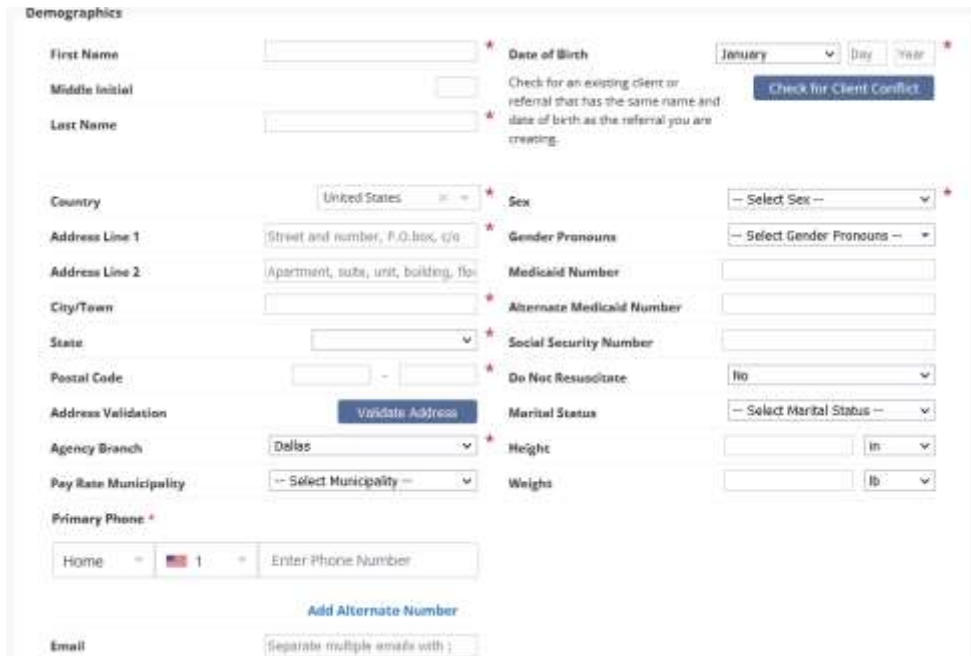
There are two ways to add a client to Axxess Home Care. The path chosen will depend on information received at the time of the referral as well as by the organization's process. To add a new client receiving skilled services as a referral, the proper location is listed here. The referral entry details page will populate. Sections with a red asterisk* indicate that the information is required to save the page.

Referral Source - This section is part of the tracking process for new referrals.

 A screenshot of a web form titled "Referral Source". The form contains several fields: "Referral Type" (a dropdown menu with "-- Select Referral Type --" and a red asterisk), "Referral Date" (a date input field with a calendar icon and a red asterisk), "Requested Start of Care Date" (a date input field with a calendar icon and a red asterisk), "Admission Source" (a dropdown menu with "-- Select Admission Source --" and an information icon), "Admission Type" (a dropdown menu with "-- Select Admission Type --" and an information icon), and "Marketer" (a dropdown menu with "-- Select User --").

- Referral Type - Describes what external entity sent the referral.
- Referral Date - Enter the date the organization received the referral from the referral source.
- Referral Start of Care Date - Requested date to begin services.
- Admission Source - Where the client came from (clinic/physician, hospital, SNF, etc.).
- Admission Type - Choose what type of admission.
- Marketer - This is an internal user associated to the referral source.

Demographics - This section contains geographical and contact details pertaining to the client.



Required items in the Demographics section include:

- Name - Enter client's first name and last name.
- Country – Axxess operates in multiple countries, choose the applicable.
- Address Line 1 - Where the client will be receiving care, city, state, ZIP code and country.
 - Select **Validate Address** to verify that the details entered are for a valid address.
- Agency Branch - The branch the client will be receiving care through.
- Pay Rate Municipality - This is for areas that pay a different minimum rate for a service area pay rates for employees (optional).
- Primary Phone - Enter the client's primary phone number including the type and country code.
- Email - Allows for multiple email addresses to be added by using commas to separate each email (optional).
- Date of Birth - The client's birth date is entered in this section.
 - **Check for Client Conflict** is a system check for an existing client with the same name and date of birth as the client being entered.
- Sex - Choose male or female and then options for preferred gender pronouns.
- Other details – Fill out all available information during referral (optional).

Services Required - This section is for indicating the type of service the client should be receiving. The options are determined by the information entered in Company Setup.

 A screenshot of the 'Services Required' form. It contains several checkboxes with corresponding labels: Home Health Aide, Homemaker, Medical Social Worker, Occupational Therapy, Physical Therapy, Registered Nurse, Skilled Nurse, and Speech Therapy. There is also an 'Other' text input field.

DME Needed - Durable Medical Equipment for the client is selected in this section. The options are determined by the information entered inside Company Setup. Select the **Add Equipment** button for more DME lines.

 A screenshot of the 'DME Needed' form. It includes a search field for 'Equipment Name' with the placeholder 'Start Typing'. Below are input fields for 'Provider Name', 'Model No.', and 'Serial No.'. A blue 'Add Equipment' button is present. A large text area for 'Non Standard Items' is shown below, with a note at the bottom right stating 'You have 250 characters remaining'.

If an item is not in the DME list, it may be added in text format in the non-standard items comment box.

Physician Information - The doctor that will sign the orders is selected in this section. It may or may not be different than the referring physician. If the physician is not found, the ability to add a **New Physician** is available.

 A screenshot of the 'Physician Information' form. It features a search field for 'Primary Physician' with the placeholder 'Start Typing' and a green plus icon. Below the search field is a radio button labeled 'Referral Source'. A blue button labeled 'New Physician' with a right-pointing arrow is located to the right.

Emergency Contacts - Emergency Contacts can be added to the referral after it has been created.

Comments - Enter free text comments or use the **Load Template** for pre-determined options.

Then, select the **Save** button to place the client in the pending admission status.


VIEWING EXISTING REFERRALS

View/Lists/Referrals or Client/Referrals

After the client’s referral has been created, the next step is admitting the client. The Referral List will appear with the client’s referral date, name, admission source, date of birth, gender, status and name of the person who entered the initial referral. There will also be a column indicating if the client is Medical “Yes” or “No.”



Referral Date	Name	Admission Source	Date of Birth	Sex	Status	Created By	Medical	Action
10/01/2021	Fwa, Client		02/14/1950	Male	Pending	Celestian Rosales RN	Yes	Edit Delete Admit Non-Admit
12/12/2019	Igba, Kelechi		01/10/1970	Male	Pending	Kelechi Igba RN	No	Edit Delete Admit Non-Admit
10/01/2021	Johnson, Oscar		10/04/1960	Male	Pending	Ramalkar Axxess RN	Yes	Edit Delete Admit Non-Admit
06/17/2021	Long, Greg		05/01/1971	Male	Pending	Greg Long RN	No	Edit Delete Admit Non-Admit

The option to add a new referral is available in this window by selecting the **New Referral** button. The printer icon  gives a preview of the referral document. It is the client’s Face Sheet, which is only available in this format prior to admitting the client. The document can be printed or saved.

Axxess Testing Agency 10000 Dallas Parkway Suite 7000 DALLAS, TX, 75248-1234 Phone: (214) 577-7719 Fax: (780) 797-7970		REFERRAL	
Source			
Referral Type	Friend	Referral Date	10/01/2021
Referral Source	Michia Manuz	Referral Details	
Admission Source			
Patient Demographics			
Name	Fwa, Client C	Date of Birth	02/14/1950
Address Line 1	0051 SW 190th Avenue, Suite	Sex	<input type="checkbox"/> Female <input checked="" type="checkbox"/> Male
Address Line 2	902	Gender Pronouns	
Marital Status	0	District	N/A
City, State, Postal Code	NEW YORK, NY 10001	Email	

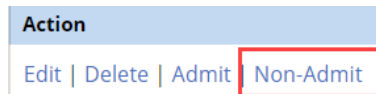
The Action column contains four options for the client’s referral:

- **Edit** - Enables the ability to modify referral details prior to admitting the client.
- **Delete** - Removes the client from the system completely. Please note, deleting the referral means the client will not be visible in any reports in the database.
- **Admit** - Generates all required information required to admit the client.

- **Non-Admit** - This removes the client from the list of referrals available for admission.

NON-ADMITTING A REFERRAL

To non-admit a client, the option must be selected in the Action column in the Referral List.



The non-admission date and reason are required before the referral can be processed in to non-admit status. A section for comments will be available.



Once the non-admission is processed, the list of non-admitted clients can be found in *Clients/Non-Admissions*.

MRN	Client	Insurance	DOB	Phone	Phone Type	Sex	Non-Admit Reason	Non-Admit Date	Medical	Action
	Ete, Xy		01/02/1987	(468) 356-4567	Home	Male	Other	10/19/2021	Yes	Admit
	Seev, Luna		03/18/1977	1546546546	Home	Male	Referral Refused Service	09/20/2021	Yes	Admit
222222222222	Smith, Nancy		02/05/1999	(444) 444-4444	Home	Female	Inappropriate For Home Care	07/15/2021	Yes	Admit

ADMITTING A REFERRAL

In the Referral List, the **Admit** hyperlink under the Action column will update the client to an active admitted status.

The Demographics section will contain all the information entered during the referral process. Below are sections that were not in the referral process that are required to admit the client:

- Record Number - This is an organization created Medical Record Number.
- Case Manager - The individual who will be overseeing the client's case.
- Assign to Clinician - The clinician/case manager that the initial care period and/or face-to-face will be assigned to.
- Care Period Start Date - This may have been entered during the referral process, but the care period start date must be confirmed.
- Start of Care Date and Admission Hour - These care time frame elements are not required, but if a SOC date is known and the client needs to be admitted during a specific hour, it should be noted.
- Emergency Triage - This section enables users to document the process during a state of emergency. Choose the appropriate level and add any additional information.

The following options are sections that were not available when entering the referral:

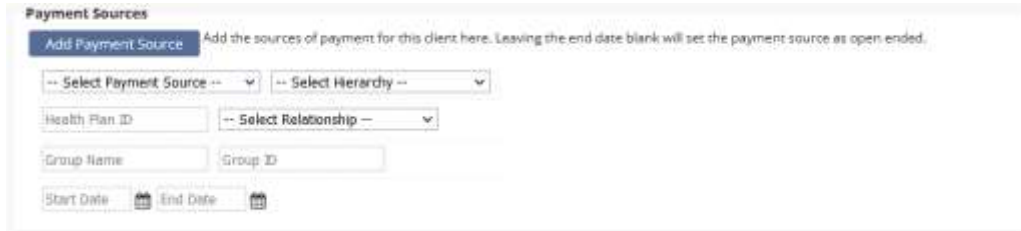
- Pharmacies - Find the patient's pharmacy by typing the name then select the **Add Pharmacy** button. Select the **Delete** hyperlink if the pharmacy listed is not correct. If the pharmacy is not in the system, select the **New Pharmacy** button to add to the database (permission-based).



Name	Work Phone	Address	Action
No Pharmacies found.			

- Payment Sources - Encompasses details of how the client will be billed. It is not required at initial client intake; however, it is beneficial to input as soon as it is obtained.
 - Select **Add Payment Source** to add multiple payer sources. Choose a payment source, hierarchy and relationship. Then enter

the health plan ID, group name, group ID and start and end date (if applicable).



- Evacuation - This section is applied to clients that live in areas that require evacuation necessities. This is based upon the organization's policy and procedures. Choose the evacuation zone and enter the address/phone numbers. If evacuation address is the same as emergency contact, select the checkbox. Emergency contact must be previously entered otherwise, it will be grayed out.
- Emergency Preparedness Comments - Enter comments related to emergency preparedness or select **Load Template** for pre-determined options.
- Contacts - All previously entered contacts will show here. Select the **Edit** or **Delete** hyperlinks to make updates. Select the **Make Primary** hyperlink to make any contact the primary. Select **New Contact** to add additional.
 - First name, last name, relation to referral and primary phone are required. Enter any other information available then select **Add**.



Selecting **Save** instead of **Admit** will generate a message with further options for proceeding.



Selecting **Go to Client Center** will load the Client Center with the pending status selected and the client's profile selected.



Selecting **Admit** will move the client in to the Client Center with an active status.



INTRODUCTION TO CLIENT CENTER

Clients/Clients Center

Client Center Filters

On the left-hand side of the Client Center window, there are parameters available to further narrow the selection when searching for a client.

- **Branch** - This option allows the user to pick the client's branch.
- **Status** - Choose between active, discharge, pending, non-admit or hospitalized.
- **Type** - This option permits the ability to filter for medical, non-medical or all types of clients. The system will default to "All."
- **Tags** - Enables filtering by tags the organization is using in the system.
- **Find** - Search the client's name and list will appear when typing in letters by first or last name.

Branch	-- All Branches --
Status	Pending
Type	All
Payer	All
Tags	<input type="text"/>
Find	<input type="text"/>

The Client Center window has tabs at the top of the window that can be selected when adding details to the client's record.

Client Center Axxess Testing Agency					
Create >	View >	Profiles >	Schedule >	Documents >	Billing >

Create Tab

Order – This button provides the option to add a new order to the client's chart. An alternative route is *Create/Order*.

Communication Note – This button allows a coordination note to be entered into the client's chart. This note can be sent to another user within the organization by selecting **Send Note as Message**.

Authorization – This option is used for clients with insurance payers, which require authorization. The client's name will automatically appear when this option is selected inside that client's chart. The start and end date ranges and authorized task options will be required depending on the client's type of authorization.

Detail			
Client Name	ABABA, JESS	Authorized Tasks	Select options
Start Date	<input type="text"/>	Status	-- Select Status --
End Date	<input type="text"/>	Authorization Number	<input type="text"/>
Select a Client, Start Date, and End Date in order to populate this list.			
Payment Source	-- Select Payment Source --		

The payment source list pulls from the details indicated in the client's chart. The list will not generate until the start and end dates are entered. The status of the authorization can be indicated by selecting the options provided. Once the top section is completed, the units' section must be addressed by indicating the unit count, type, frequency, and the total.

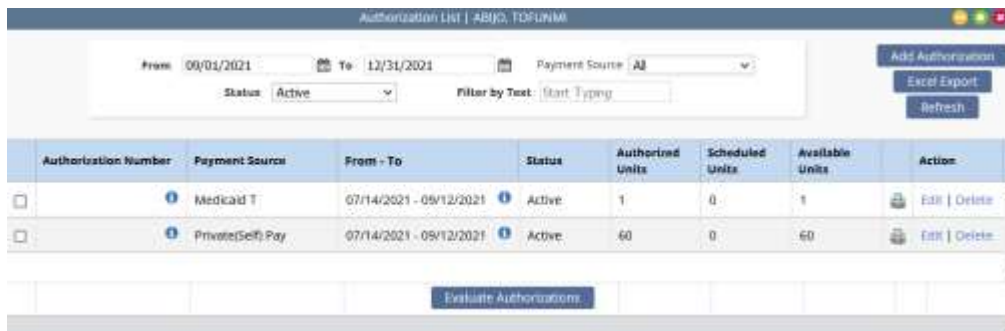


- Unit types provides the option to indicate how the units will be measured.
- If there is a restriction on the days the authorization is used on, there is an opportunity to indicate so in the “Days authorization restriction to” section.
- The **Calculate Total** button will use the details entered for the unit count, frequency and date range to determine how many units the authorization will be for.
- Selecting the per hour unit type will have the option to indicate how many times the visits will occur -depending on the frequency type selected. These details will be visible when the total is calculated.

View Tab

The list of items under the **View** tab will also be accessible from the Quick Reports.

Authorizations Listing – Enables users to search, view or edit existing authorizations as well as add new authorizations as needed. Actions include the ability to view or print, **Edit**, evaluate and **Delete** existing authorizations.



Authorization Number	Payment Source	From - To	Status	Authorized Units	Scheduled Units	Available Units	Action
	Medicaid T	07/14/2021 - 09/12/2021	Active	1	0	1	Edit Delete
	Private(Self) Pay	07/14/2021 - 09/12/2021	Active	60	0	60	Edit Delete

Communication Notes – Enables users to view existing communication notes as well as add new notes as needed (**New Comm. Note**). Users may search by care period and further filter by text. Existing communication notes will display in the grid. Actions include the ability to **Edit**, **Delete** and view existing notes in the PDF format.

Communication Notes | Axxess Testing Agency | ABABA, JESS

Care Period: 09/20/2021 - Filter by Text: Start Typing

New Comm. Note
Excel Export
Refresh

Employee Name	Subject Line	Date	Status	Action
CJ Pierson RN	Lab Results	10/27/2021	Submitted Pending Co-Signature	Edit Delete
Eric Stone RN	sdfsdf	10/12/2021	Completed	Edit Delete

Orders and Care Plans – Enables users to view existing orders and care plans. Users may search by care period. Actions (permission-based) include the ability to view, print or delete. The list of orders and care plans may be exported to Excel.

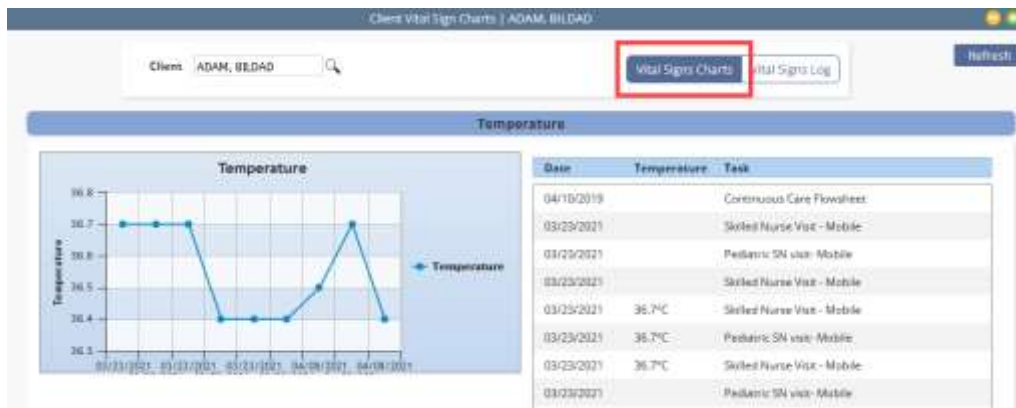
Client Orders History

Date Range: 08/02/2021 - 11/02/2021

Excel Export

Order Number	Subject Line	Type	Status	Physician	Electronic	Order Date	Sent Date	Received Date	Actions
N/A		Physician order	Completed		No	10/26/2021			
641379	Physician Order RX - Old		Not Yet Started	Abbott, Nicole	No	10/20/2021			
N/A	Access Custom Care Plan		Not Yet Started		No	10/18/2021			

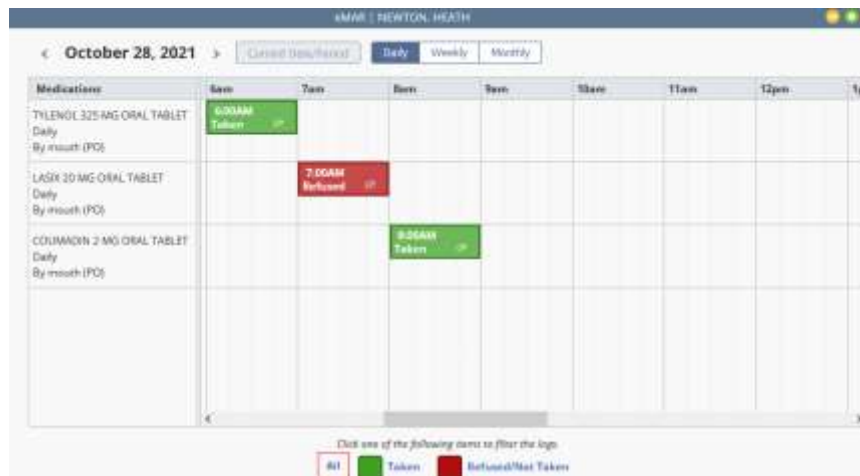
Vital Signs Chart – Displays the client’s most recent seven visits and the vitals entered during those visits. Vitals may be viewed in graph format as well. The Vital Sign Log contains the temperature, weight, respiratory rate, pain level, pulse, blood sugar, blood pressure, and an overall report with all vital signs during the period.



Seizure Records - Displays a list of existing seizure records. The list may be searched by date range and further filtered by text. Individual record details may be viewed or printed via the printer icon, and the entire list may be exported to Excel. Available actions include the ability to edit and/or delete based on permissions.



eMAR Chart - (medical admissions only) Enables users to view the client's medication administration record. Display options include daily, weekly or monthly views. Client medications are listed in the left column, and the administration log displays green for taken meds and red for refused/not taken.



eTAR Chart - Displays all recorded treatments given and refused/not given in a daily, weekly, or monthly format. Enter treatment records, edit, or delete records.

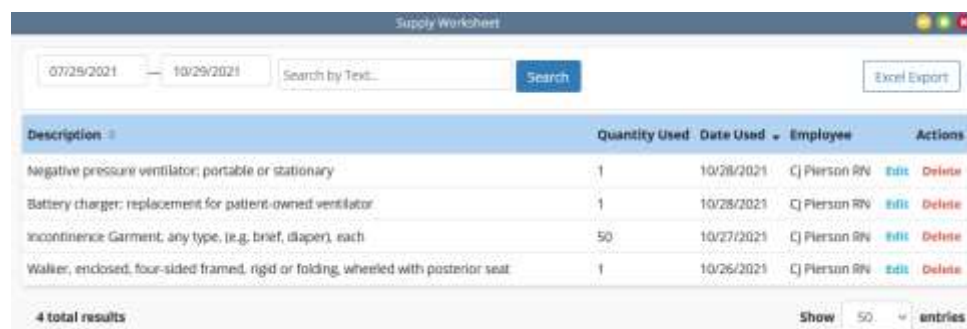


I&O Logs - (medical admissions only) Enables users to search and view recorded input and output values for the client. The default shows the summary report, but users may **View Details** by selecting the link. Additional actions include the ability to **Edit/Delete Details** recorded values (permission-based).




Date	Total Input Amount	Total Output Amount	Variance	Action
10/26/2021	0	100.00	-100.00	View Details Edit/Delete Details
10/27/2021	150.00	100.00	50.00	View Details Edit/Delete Details
10/28/2021	30.00	40.00	-10.00	View Details Edit/Delete Details

Supply Log - Search supply logs by name or enter a date range to display supply worksheet addenda completed within a specific time frame. Depending on the permissions, users can **Edit** and/or **Delete** addenda using the hyperlinks in the Actions column. There is also an option to export to Excel.



Description	Quantity Used	Date Used	Employee	Actions
Negative pressure ventilator, portable or stationary	1	10/28/2021	CJ Pierson RN	Edit Delete
Battery charger, replacement for patient-owned ventilator	1	10/28/2021	CJ Pierson RN	Edit Delete
Incontinence Garment, any type, (e.g. brief, diaper), each	50	10/27/2021	CJ Pierson RN	Edit Delete
Walker, enclosed, four-sided framed, rigid or folding, wheeled with posterior seat	1	10/26/2021	CJ Pierson RN	Edit Delete

4 total results Show 50 entries

Wound Flow Sheet - Displays all recorded wound care documentation. Filter by assessment date, location, onset date, wound type, and pressure ulcer stage. Other details such as measurements, drainage, drainage amount, and odor can also be viewed. Under Actions, select the  icon to view the complete wound assessment for the entry.



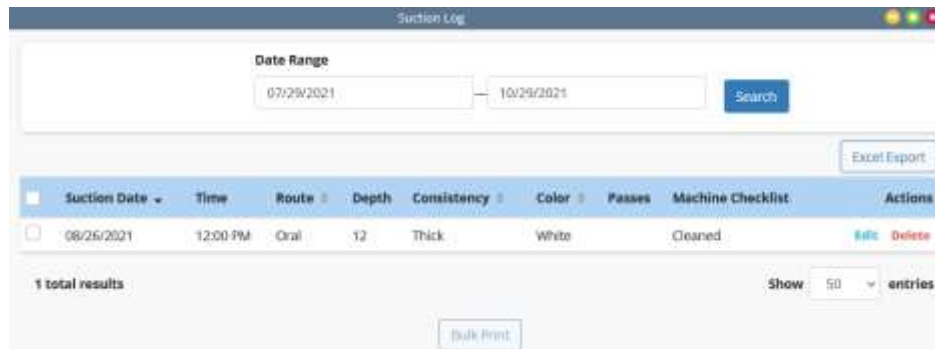
The screenshot shows a web application window titled "Wound Care Flow Sheet". At the top, there is a "Date Range" filter with input fields for "08/17/2022" and "12/01/2022", and a "Search" button. Below the filter is a table with the following columns: Assessment Date, Location, Onset Date, Wound Type, Pressure Ulcer Stage, Measurements (in cm), Drainage, Drainage Amount, Odor, and Actions. A single row is visible with the following data: 11/29/2022, Skin, 11/29/2022, O2, 4, 32L, 12.96, 15.0, Not, N/A, No, and an eye icon in the Actions column.

Vent Flow Sheet - Displays all recorded Ventilator Flow Sheets. Filter, print, **Edit** and/or **Delete** the flow sheets as needed.



The screenshot shows a web application window titled "Ventilator Flow Sheets | Axxess Testing Agency | NEWTON, HEATHER". It features a "Task Date Range" filter with dates "07/01/2020" and "10/29/2021", and a "Filter by Text" field. Below the filter is a table with columns: Task, Task Date, Vent Type, Employee, and Action. A single row is visible: Vent Flowsheet, 07/28/2020, Astral, PIERSON, CJ, and an Actions column containing "Edit | Delete" with a user icon.

Suction Log - Search suction logs entering a date range to display suction worksheet addenda completed within a specific time frame. Depending on permissions, users can **Edit** and/or **Delete** addenda using the hyperlinks in the Actions column. There are also options to **Bulk Print** and export to Excel.



The screenshot shows a web application window titled "Suction Log". It has a "Date Range" filter with dates "07/29/2021" and "10/29/2021", and a "Search" button. Below the filter is an "Excel Export" button. The table has columns: Suction Date, Time, Route, Depth, Consistency, Color, Passes, Machine Checklist, and Actions. A single row is visible: 08/26/2021, 12:00 PM, Oral, 12, Thick, White, Cleaned, and an Actions column with "Edit | Delete" links. At the bottom, it shows "1 total results", a "Show: 50 entries" dropdown, and a "Bulk Print" button.

Fall Risk - Displays all recorded fall risk assessments. Depending on permissions, users can filter, view, print and/or delete the assessments using the icons in the Actions column. There is also an option to export to Excel.

Fall Risk Assessment

Date Range: 07/29/2021 - 10/29/2021 [Search] [Excel Export]

Date *	Task	Complete by	Fall Risk Total	Actions
10/28/2021	Skilled Nursing Visit	CJ Pierson RN	4	[Print] [Refresh] [Delete]

1 total results [Show 50 entries]

Triage Classification - This section contains information based on answers from client's profile emergency preparedness section.

Access Testing Agency 16000 N Dallas Pkwy #700N Dallas, TX 75248-1234 Phone: (111) 111-1111 Fax: (222) 222-2222	TRIAGE CLASSIFICATION
Client: 16000 North Dallas Dallas, TX 75248 Phone: (333) 333-3333 PhoneType: Mobile	MRN: PCS-002 DOB: 01/15/1956 Emergency Contact (111) 111-1111
<input type="checkbox"/> 1. Life threatening (or potential) and requires ongoing medical treatment. When necessary, appropriate arrangements for evacuation to an acute care facility will be made.	

Infection Log - Displays all recorded infections. Depending on permissions, users can filter by date, add, print, edit and/or delete the infections as needed. There is also an option to export to Excel.

Infection Log List

ABABA, JESS L (GDS11192030) • Female
 16000 Dallas Parkway Nb, Dallas, TX • (866) 795-5990 • 03/12/1980

Date Range: 08/02/2021 - 11/02/2021 [Excel Export] [Add Infection]

Physician	Type of Infection	Infection Date *	Status	Actions
Pifer, Curtis MD	Skin	10/30/2021	Completed	[Print] [Refresh] [Delete]

1 total results [Show 25 entries]

Hospitalization Log - Displays a list of the client hospitalizations. **Edit, Delete** or print the individual log entries.

Source	In Date	End Date	Status	Last Home Visit	User	Facility	Unit	Contact	Payment Source	Preventable	Follow Up
User-Generated Transfer	10/12/2021	10/12/2021	Active	10/12/2021	STONE, ERIC K.	Memorial	Unit 3	DC Planner	Aflac	Yes	

Client Service Goals – This section is the client’s goals and objectives. The user can toggle between active and discontinued to view the effective date, goal/objective, discontinuation date. Select **Discontinue** under Actions to manually discontinue a goal.

Effective Date	Goal/Objective	Discontinuation Date	Actions
12/01/2022	Patient will have no further falls.	01/01/2023	Discontinue

1 total results

Visit Tracking – This section houses the information for missed or reassigned visits. View information by tracking type, task, task date, reason, employee, performed by, and performed on. Select **Edit** under the Action tab to update the reason listed.

Tracking Type	Task	Task Date	Reason	Employee	Performed By	Performed On	Action
Reassign	Companion	11/18/2020	Compatibility	Richard Parthasarathi	Marie Sobush RN	11/13/2020	Edit
Reassign	AV Mobile	11/20/2020	Compatibility	Sonya Sobush	Marie Sobush RN	11/25/2020	Edit
Missed Visit	Custom Visit - Mobile	05/11/2020	Cancellation of Care	Unassigned	Marie Sobush RN	02/10/2021	Edit

Deleted Tasks/Documents - Axxess is a cloud-based software, so most deleted data will remain in the system. Search by text. Based on permissions, users can select **Restore** to undo a deleted task or document.

Task/Document	Scheduled Time	Actual Time	Status	User	Action
Nutritional Assessment Form	11/22/2021 12:30 PM	11/22/2021 12:30 PM	Not Yet Due	Lorna Symonds RN	Restore
Homemaker Visit	10/19/2021 04:00 PM	10/19/2021 04:00 PM	Not Yet Started	Jan Sedayao	Restore
Homemaker Visit	10/19/2021 02:00 PM	10/19/2021 02:00 PM	Not Yet Started	Jan Sedayao	Restore
24 hour visit note	10/16/2021	10/16/2021	Not Yet Started	Rupali Kaware RN	Restore
Initial Pediatric Assessment- Training	10/16/2021	10/16/2021	Not Yet Started	Ladawn Pierce RN	Restore

Profiles Tab

Client Profile - This section is the client's Client Profile Data Sheet. It is a PDF synopsis of the client's profile. Upon viewing, users can **Download**, **Print** or **Close**.

Access Testing Agency 18000 Dallas Parkway Suite 7000 DALLAS, TX, 75248-1234 Phone: (214) 577-7719 Fax: (789) 797-7978		Client Profile	
Name: ABIDA, Jess L. 18000 Dallas Parkway NB Dallas, TX, 75248-7524 Phone: (856) 795-5990 Phone Type: Work		SOC: 07/22/2021 Sex: Female Gender Pronouns:	Birth Date: 03/12/1980 Marital:
MR: GDS11192030 Care Period: 09/20/2021 -	DNR: Yes Triage Level: 2 Not life-threatening but would suffer severe adverse effects.	Office: Dallas Race: White Height:	Weight: Referral Date: 07/21/2021
Insurance		Emergency Contact	
medicare	11192020	Primary	
Bob's Invoice	0961	Primary	
		Primary	
		Name	Phone
		HENKELS, PAMELA	(970) 967-9574
		CHISOSI, MAK	(342) 342-3423
		CROSS, KANIK	1231231231
		PARTHASARATHI, PRIAS	(423) 212-1212
			Relationship
			Unknown (Pit)
			Employee
			Employee
			Self
Allergies		Pharmacy	
rashes		Name:	
		Phone:	
Current Care Period		Primary Diagnosis	
Download		Print	
Close			

Treatment Profile - The Treatment Profile houses all treatments the client is receiving. The list is split into active and discontinued treatment(s). Add, print, refresh or reorder treatments by selecting the corresponding buttons. Additional options are available under the Action column button.

Treatment Profile | ABIDA, JESS

Treatment Profile

Client: ABIDA, JESS
 Primary Diagnosis: N15.0 - Balkan nephropathy
Current Care Period: 09/20/2021 - Open
 Secondary Diagnosis: C81 - Malignant neoplasm of base of tongue


[Add Treatment](#)
 [Print Treatment Profile](#)
 [Reorder Treatments](#)

Active Treatment(s)					
Start Date	Treatment	Description	Frequency	D/C Date	Action
07/01/2021	Aspiration	Aspiration Precautions at all times. HOB Elevated 30 degrees with feeding and 30 minutes AFTER feeding. Suction equipment with Patient at all times.	PRN		⋮
09/20/2021	Aspiration	Aspiration Precautions at all times. HOB Elevated 30 degrees with feeding and 30 minutes AFTER feeding. Suction equipment with Patient at all times.	Twice/daily		⋮

Discontinued Treatment(s)					
Start Date	Treatment	Description	Frequency	D/C Date	Action
No Discontinued Treatments					

[Reorder Treatments](#)

Medication Profile - This section contains details of the client’s Medication Profile. Client medications are separated into active and discontinued medications. Users can **Add, Discontinue, Activate** medications, **Sign Medication Profile, Print Medication Profile**, check **Drug Interactions**, view **Signed Medication Profiles** and **Reorder Medications**.



LS	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy	D/C Date	Action
<input type="checkbox"/>		ASPIRIN Three times daily by mouth (PO)	N	analgesic	Soft, Kavineth ATC	CVS 1234 Tessler Lane, DENTON		View
<input type="checkbox"/>		PARACETAMOL 2 by mouth (PO)	N	central nervous system agents				View
<input type="checkbox"/>		atorvastatin atorvastatin	N	statins				View

LS	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy	D/C Date	Discontinue Reason	Action
<input type="checkbox"/>		TYLENOL 325 MG ORAL CAPSULE aspirin (tab)	N	central nervous system agents			08/14/2021 12:00 AM	NA	View
<input type="checkbox"/>	10/01/2021	PREDNISOLONE 10 MG ORAL TABLET, DISINTEGRATING 1 a daily by mouth (PO)	N	adrenal cortical steroids	Knutson, Jonathan OD	CVS DALLAS	10/15/2021 12:00 AM	NA	View

Infectious Disease Profile - The Infectious Disease Profile is designed to help organizations easily track infectious diseases and screening tools used to detect them. Create a new screening by selecting the **Add COVID-19 Screening** button or **View** by selecting the hyperlink.



Entered By	Person Screened	Name of Person Screened	Type of Screening	Date of Screening	Risk Level	Screening Results	Temperature	Actions
Person, CJ RN	Client	ABABA, JESS L.	COVID-19	10/28/2021	High	Yes-1/4 questions	98	View
Stone, Eric RN	Client	ABABA, JESS L.	COVID-19	10/12/2021	Low	Yes-0/4 questions	98.6	View
Ndu, Sunday RN	Client	ABABA, JESS L.	COVID-19	07/05/2021	High	Yes-1/4 questions	N/A	View

Immunization Profile - This section contains a list of all immunizations. **Add, Deactivate, Decline, Delete** or export the list of immunizations.

Immunization Profile | ABABA, JESS L.

[Add Immunization](#)
[Decline/Contraindicate Immunization](#)
[Export to Excel](#)

ACTIVE IMMUNIZATIONS						
Immunization	Administered?	Date Administered / Documented	Administered By	Lot #	Reason	Action
Flu	Yes	12/18/2020	Clinic			Delete Deactivate

INACTIVE IMMUNIZATIONS						
Immunization	Administered?	Date Administered / Documented	Administered By	Lot #	Reason	Action
Shingles	Declined	11/01/2021				Delete Reactivate

[Refresh Immunizations](#)
[Exit](#)

Allergy Profile - This section contains a list of all client allergies. **Add Allergy**, **Edit**, **Delete** and print the list of allergies.

Allergy Profile

Client Name: ABABA, JESS Physician: Abbott, Nicole

[Add Allergy](#)
[Refresh Allergies](#)
[Print Allergy Profile](#)

ACTIVE ALLERGIES		
Name	Type	Action
rashes	animal	Edit Delete

DELETED ALLERGIES		
Name	Type	Action

Schedule Tab - The **Schedule** menu has a Schedule Activity option which generates the client's Schedule Center window.

Documents Tab - The **Documents** menu has two options available to select:

New Document - Enables users to attach a document to the client chart. It contains two required completion fields: Choose document name and a new document attachment field. Once completed, select the **Upload** button.

NOTE: There is a 25MB document size limit. Documents greater than 25MB will need to be separated prior to uploading.

View Documents - Enables users to add, view, edit and delete existing client documents.

Client Documents List | ABABA, JESS L.

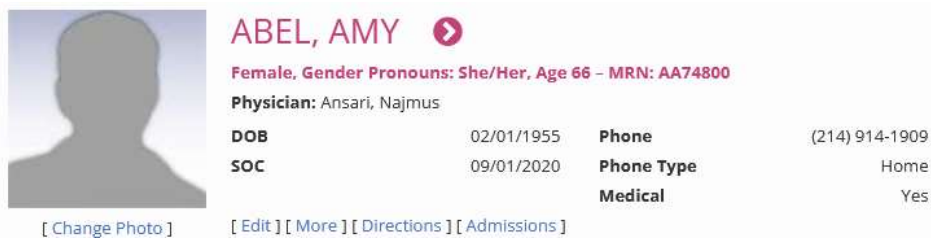
Filter by Text Add Document Refresh


Document Name	File Name	Created	Modified	Action
authorizations	SkilledNurseVisit_637684438679305702	10/04/2021	10/04/2021	Edit Delete
Admission Records 1	PhysicianOrder_637686852129531500.f	10/04/2021	10/04/2021	Edit Delete
485/ Plan of Care	_637659389006618867.pdf	08/31/2021	08/31/2021	Edit Delete
Dane Client Test	SkilledNurseVisit_637713646259634743	11/01/2021	11/01/2021	Edit Delete
client.pl	PhysicianOrder_637696359433450596.f	10/19/2021	10/19/2021	Edit Delete
Admit paperwork	SkilledNurseVisit_637697219423397382	10/15/2021	10/15/2021	Edit Delete

Billing Tab - The **Billing** tab has three options available to select: **New Invoice**, **Invoice History** and **Deposit**.

Client Center Client Profile

The main section of the client charts window will contain a brief synopsis of the client's details:



ABEL, AMY 

Female, Gender Pronouns: She/Her, Age 66 – MRN: AA74800



Physician: Ansari, Najmus

DOB 02/01/1955 **Phone** (214) 914-1909

SOC 09/01/2020 **Phone Type** Home

Medical Yes

[Change Photo] [Edit] [More] [Directions] [Admissions]

- The client's picture can be uploaded by the organization as a form of visual reference.
 - A **Change Photo** hyperlink is available for the uploading process.
- The client's name will be indicated next to the picture.
 - Selecting the arrow  next to the client's name will open the Schedule Center.
 - If the client has a Do Not Resuscitate request, an indicator  will be visible next to the name.
- The organization assigned Medical Record Number (MRN) will be visible after the client's gender, preferred pronouns, and age.

- The physician, DOB, SOC date, phone number, type and indicator of medical/non-medical status will also be visible in the middle of the Client Center so that they may be referenced easily.

Below the client’s details are helpful hyperlinks:

[\[Edit \]](#) [\[More \]](#) [\[Directions \]](#) [\[Admissions \]](#)

Edit - This hyperlink will open the client’s chart which contains the referral and admission details (permissions based).

More - This hyperlink will produce additional client details.


MRI#	AA74800
Name	ABEL, AMY
Sex	Female
Address Line 1	22438 Glen Oak St
Address Line 2	
City	Clinton Twp
State, Zip	MI 48035
Postal Code	MI 48035
Primary Phone	(214) 914-1909
Secondary Phone	
Start of Care Date	09/01/2020
Date of Birth	02/01/1955
Physician Name	Anson, Najmus
Physician Phone	(407) 280-2905
Physician Fax	(407) 284-6917
Emergency Name	MOHINDRA, RAJEEV
Emergency Phone	(818) 281-2396
DNR	No

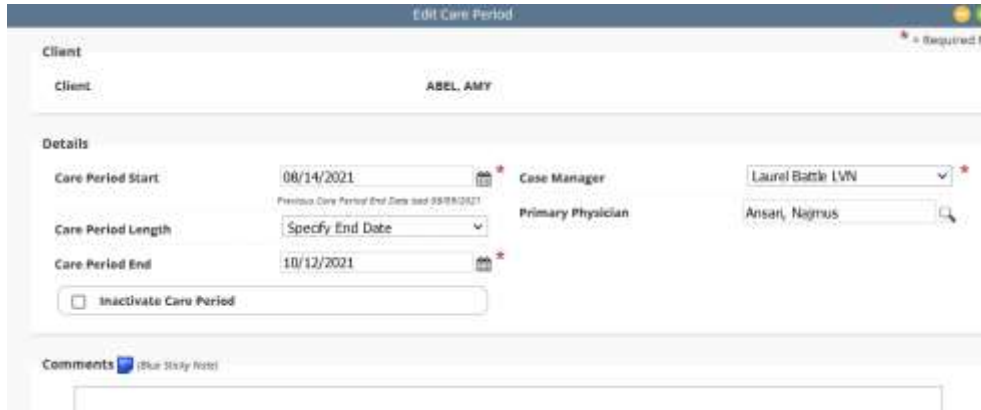
Directions - Provides turn by turn directions to the client’s home as well as satellite view directions. Starting address defaults as the organization’s address but may be altered as desired.

Admissions - If the client was discharged and readmitted, the admission periods will be listed in this window.

Admission Date	Discharge Date	Current Admission Period	Associated Care Period(s)	Action
09/01/2020		Yes	Yes	

Care Period Start Date	Care Period End Date	Action
06/15/2021	08/09/2021	Edit Care Period
08/14/2021	10/12/2021	Edit Care Period
01/01/2021	05/01/2021	Edit Care Period
01/01/2020	12/31/2020	Edit Care Period

Selecting the  icon beside the admission date will generate more details pertaining to that admission period. In the Actions column, the ability to **Edit Care Period** will be visible for users with the corresponding permissions.



The screenshot shows a web form titled "Edit Care Period" for a client named "ABEL, AMY". The form is divided into several sections:

- Client:** Client: ABEL, AMY
- Details:**
 - Care Period Start: 08/14/2021 (with a calendar icon)
 - Care Period Length: Specify End Date (dropdown menu)
 - Care Period End: 10/12/2021 (with a calendar icon)
 - Case Manager: Laurel Battle LVN (dropdown menu)
 - Primary Physician: Ansari, Najmus (dropdown menu)
 - Inactivate Care Period:
- Comments:** (Blue Sticky Note)

For more details, please reference *Managing Episodes* in the *Schedule Center* section within this document.

Blue Action Buttons

The three action buttons in the middle section of Client Center include the following functions:

- **Refresh** - Refreshes the screen after any changes are made to the chart.
- **Schedule Activity** - Navigates the user to the Client Schedule for scheduling and viewing Tasks. Alternate links to the Schedule Center from within the client's chart is selecting the client's name or going to *Schedule/Schedule Activity*.
- **Change Status** - Allows users to change the status of the client to discharged, pending, non-admitted or hospitalized.

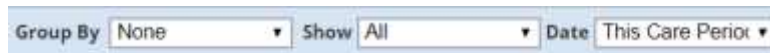
Client Center Quick Reports

The list of items under the Quick Reports is also accessible from the **View** and **Profiles** tabs.



Client Center Tasks

The lower section of the client chart contains a list of scheduled and completed documents for the client. The list of documents may be grouped or filtered by task type or date range.



- Group By - None, task, scheduled date, assigned to or status.
- Show - All, orders, nursing, PT, OT, ST, MSW, HHA or dietician.
- Date - All, date range, this care period, last care period, next care period, etc.

Additionally, the bottom section includes the following columns:

Task	Date	Time In - Out	Assigned To	Status
Skilled Nurse Visit - Mobile	10/27/2021	05:00 AM-06:00 AM	CJ Pierson RN	Not Yet Started
Communication Note	10/27/2021	N/A	CJ Pierson RN	Submitted Pending Co-Signature

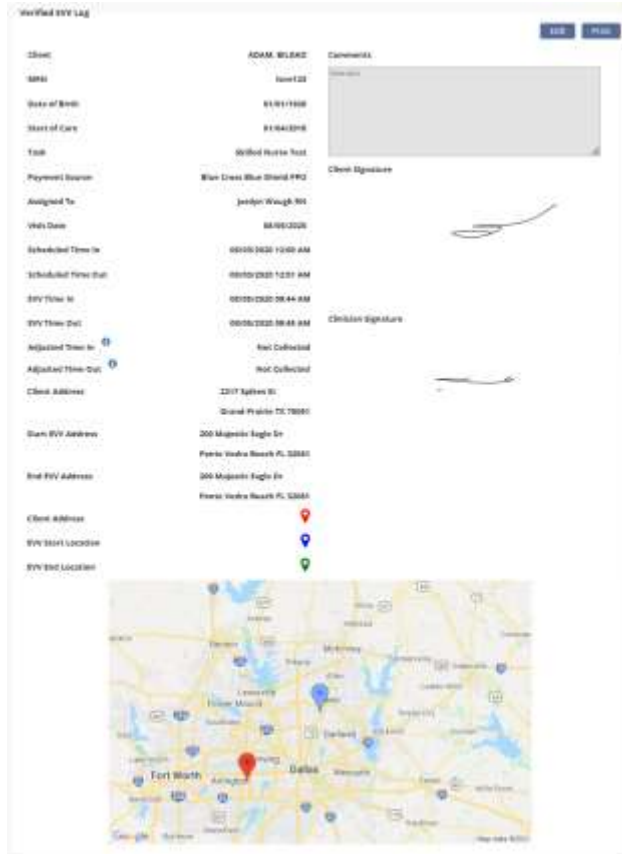
Task - Displays the document name. The document name acts as a link to open and complete any task not in a completed status.

Date, Time In-Out, and Assigned To - The date and time are set to the scheduled date and time until the note is completed. It then displays the actual date and time of the task. The employee scheduled for the task will be displayed next.











Status - Displays the status of the task. Examples include not yet due, not yet started, submitted with signature, submitted pending co-signature, completed, returned from QA, sent to physician and returned with physician signature.

Electronic Visit Verification - A house icon provides notification that EVV has occurred for the task. A yellow house indicates the employee has clocked in and

a green house indicates the employee has clocked out and obtained client signature. Selecting the house provides EVV details.



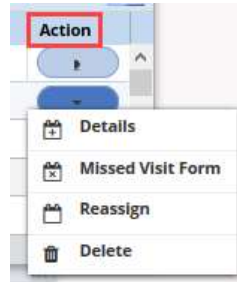
Sticky Notes - Yellow sticky notes show notes for a particular task, blue shows notes related to the whole care period, red shows missed visit notes and orange shows notes that are returned for review.

-  Adjusted In Progress EVV
-  Adjusted Completed EVV
-  In Progress EVV
-  Completed EVV
-  Not Started EVV
-  Visit Comments
-  Care Period Comments
-  Missed
-  Returned
-  Print Document
-  Attachments

Print Document Icon - Selecting the printer icon displays the print view of the document. From here, the document may be downloaded or printed.

Attachments Icon - Displays documents attached to the notes. Attachments are added from within the details tab and may include wound pictures.

Action Column - Contains various action items based on the note status as well as the user's permissions.



- **Details** - Provides information related to the task. Certain fields are available for editing based on the note status and may include document name, time in-out, payer, status, employee, surcharge/mileage, update bill/pay, add task (yellow) sticky note, add supplies as well as the ability to upload up to three documents. Last is the ability to view the Activity Log for this task.
- **Reassign** - Tasks in a not yet due or not yet started status may be reassigned to another user.
- **Reopen** - Provides the ability to reopen completed documents to make changes necessary to the note.
- **Restore** – Users with permissions undo missed visits.
- **Schedule Comments** – Users can view, add, edit and delete schedule comments regarding client scheduling.
- **Missed Visit** - Scheduled or saved tasks have the option to record the task as a missed visit.
- **Delete** - Provides the ability to delete the task, which will then move to the Deleted Tasks/Documents under the client's Quick Reports.

NOTE: The lower half of the client chart may be expanded to increase the field of vision for the task list .

An alternative route to review client tasks and schedule further visits is to select the **Schedule Activity** button, and it will generate the Schedule Center window.

INTRODUCTION TO THE SCHEDULE CENTER

The Schedule Center is the view of the client's tasks in a calendar format.



Schedule Center Filters

The left column provides the ability to view client and employee calendars/schedules. The default search is by client. Selecting employee updates the criteria and results to employees.

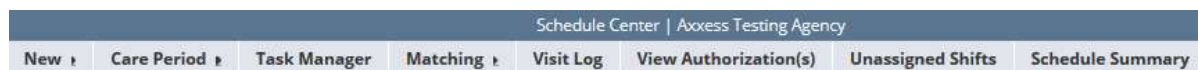


- **Branch** - Default is all branches. User's that have multiple branch access under the same organization may limit the client/employee search by selecting an individual branch location.
- **Status** - The client or employee's status level.
 - Client: The default status is active but may be filtered to view discharge, pending, hospitalized, non-admit.
 - Employee: Active, inactive, terminated.
- **Type** - Distinguishes the type of employee or client.
 - Client: Medical, non-medical or all (default).
 - Employee: System, non-system or all (default).

- Payer - Client only search item. Drop-down list of payment sources.
- Tags - Allows filtering by tags the organization is using in the system (client/employee).
- Find - Provides the ability to input part of the client/employee first or last name and filter the list.

Schedule Center Top Menu

The **Schedule Center** has a list of menus that will assist with preparing and managing the client's schedule.



New - This menu option has one item available to select **Client Task**. This option is one of the two ways to schedule a task for the client.

Care Period - An active care period covering the timespan being scheduled is a prerequisite to successfully scheduling any task. To add a new care period the user selects *Care Period/New Care Period*.

New Care Period - The following information will be available to complete:



- Care Period Start Date - Date the care period starts.
- Care Period Length - Several specified lengths exist to choose from along with an option for an open length (clients that do not require orders) and a specified length where the user inputs the length of days.
- Start of Care - Pulls from the client file.

- Case Manager - Indicates who will be case manager.
- Primary Physician - Pulls from the client file.
- Comments - Comments entered here pull to the blue sticky notes which are viewable from the task list.

List Care Periods - All active and any inactive care periods for the client will be displayed.



ACTIVE CARE PERIODS		
Start Date	End Date	Actions
09/20/2021		Edit Deactivate
07/22/2021	09/19/2021	Edit Deactivate
07/13/2021	07/20/2021	Edit Deactivate
01/15/2021	01/28/2021	Edit Deactivate
06/01/2020	01/14/2021	Edit Deactivate

INACTIVE CARE PERIODS		
Start Date	End Date	Actions
No Inactive Care Periods		

- For convenience, the option to add a **New Care Period** is also available in the List Care Periods window.
- The show filter option provides the option to view active only, inactive only or all types of care periods.
- Viewing inactive only episodes will have one action option: the ability to **Activate** the inactive care period.
- Viewing active care periods will have the option to **Edit** or **Deactivate** care period.

Task Manager - The Task Manager allows the ability to **Reassign** or **Delete** multiple tasks at the same time.



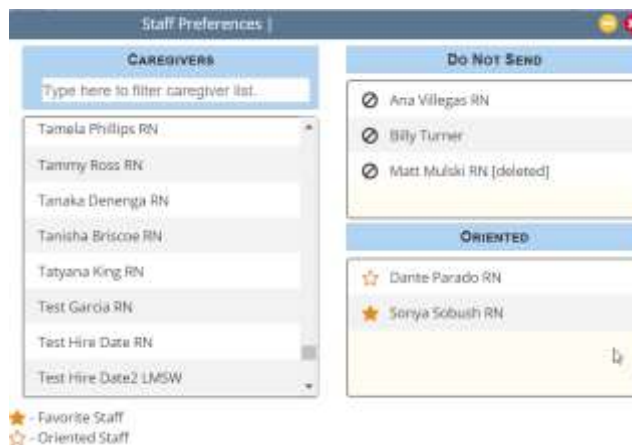
Task/Document	Date	Time	Status	Employee
<input type="checkbox"/> Infection Log	10/30/2021	N/A	Submitted With Signature	CJ Pierson RN
<input type="checkbox"/> Skilled Nurse Visit - Mobile	10/27/2021	05:00 AM-06:00 AM	Not Yet Started	CJ Pierson RN
<input type="checkbox"/> Communication Note	10/27/2021	N/A	Submitted Pending Co-Signature	CJ Pierson RN
<input type="checkbox"/> Physician order	10/26/2021	N/A	Completed	Rupali Kaware RN
<input type="checkbox"/> home health aide visit	10/25/2021	10:00 AM-04:00 PM	Submitted Pending Co-Signature	CJ Pierson RN

Tasks that have been started or completed cannot be reassigned.

Matching - This tab has two submenus: **Preferences** and **Match Criteria**.

Preferences - Provides the ability to mark a caregiver as oriented, a client favorite or as a do not send.

- To complete this, drag and drop the caregiver to the appropriate category. To indicate a caregiver as a favorite, select the name once they are in the oriented category.
- Oriented and favorite staff are displayed at the top of the employee list when scheduling, whereas the do not send staff display as view only at the end of the list.



Staff Preferences

CAREGIVERS

Type here to filter caregiver list.

- Tamela Phillips RN
- Tammy Ross RN
- Tanaka Denenga RN
- Tanisha Briscoe RN
- Tatyana King RN
- Test Garcia RN
- Test Hire Date RN
- Test Hire Date2 LMSW

DO NOT SEND

- Ana Villegas RN
- Billy Turner
- Mat Mulski RN [deleted]

ORIENTED

- Dante Parado RN
- Sonyia Sobush RN

★ - Favorite Staff
☆ - Oriented Staff

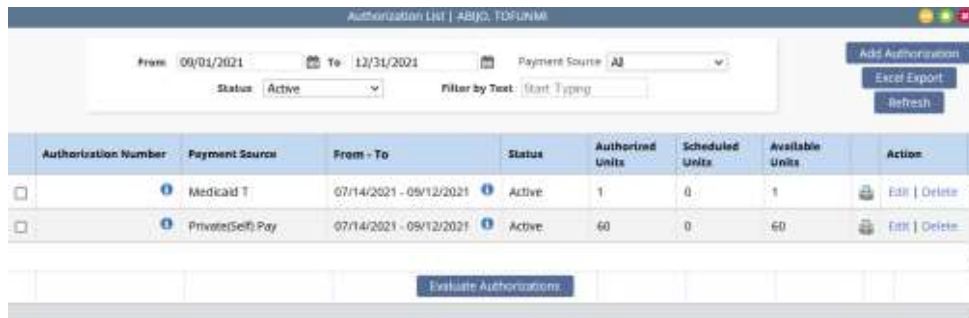
Match Criteria - Takes the user to the client's match criteria in their client file. From here, the client's criteria may be viewed or updated. The matching list is created by the organization and is taken into consideration when using the matching functionality during the scheduling process.




Visit Log - This option provides the ability to update specific information for billable tasks. This is particularly useful for updating non-system user information. Task status, start and end dates, time in/out as well as travel time logging may all be updated from this menu.



View Authorization(s) - This menu offers a quick link to the client's authorization screen to view, edit, delete, or add a new authorization.

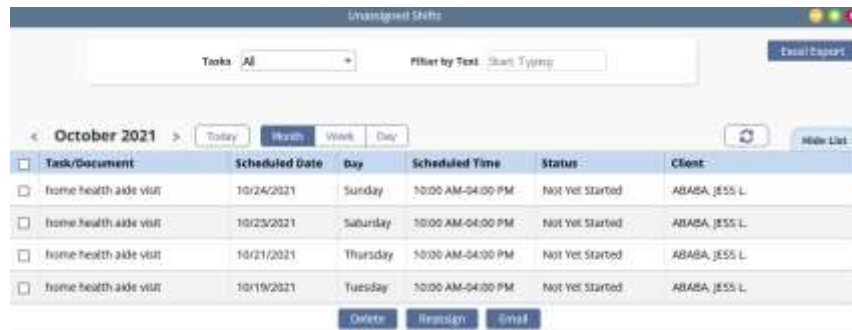


Hovering over the  will indicate the tasks assigned to the authorization.



The ability to evaluate the authorization is available at the bottom of the window by selecting the **Evaluate Authorizations** button.

Unassigned Shifts - The Unassigned Shifts menu displays all scheduled tasks that have not been assigned to a caregiver. The default page display is for the unassigned (open) tasks for the current month in list view. Users may adjust the date range (month/week/day) or view in calendar format (select **Hide List**). To assign a caregiver, select the day(s) they are confirming, select **Reassign** and choose the caregiver who is accepting the shift(s).

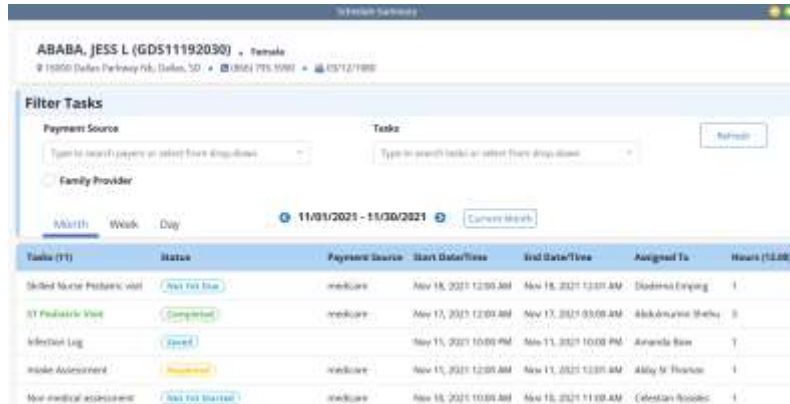


Task/Document	Scheduled Date	Day	Scheduled Time	Status	Client
<input type="checkbox"/> home health aide visit	10/24/2021	Sunday	10:00 AM-04:00 PM	Not Yet Started	ABABA, JESS L
<input type="checkbox"/> home health aide visit	10/23/2021	Saturday	10:00 AM-04:00 PM	Not Yet Started	ABABA, JESS L
<input type="checkbox"/> home health aide visit	10/21/2021	Thursday	10:00 AM-04:00 PM	Not Yet Started	ABABA, JESS L
<input type="checkbox"/> home health aide visit	10/19/2021	Tuesday	10:00 AM-04:00 PM	Not Yet Started	ABABA, JESS L

Schedule Summary - Enables users to see each client's scheduled hours at a summary level for at-a-glance review and identification of scheduling issues. The summary can be filtered by payment source, tasks and family provider. Tasks can be viewed by month, week or day. The list of tasks will display with the following column headers:

- **Tasks** - Shows the name of each task on the list. The total number of scheduled tasks is displayed in parentheses in the column header.
- **Status** - Shows the status of each task on the list.
- **Payment Source** - Shows the payment source for each scheduled task on the list.
- **Start Date/Time** - Shows the start date and time of each scheduled task on the list.
- **End Date/Time** - Shows the end date and time of each scheduled task on the list. Once a task is completed, the hours update to the actual times that the task was started and ended.

- Assigned To - Shows the caregiver assigned to each task on the list.
- Hours - Shows the number of hours from the schedule start to schedule end of the task. The total number of hours is displayed in parentheses in the column header.



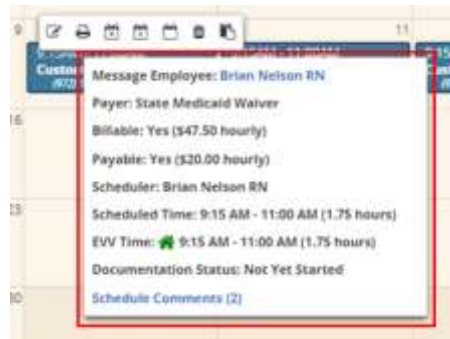
Tasks (11)	Status	Payment Source	Start Date/Time	End Date/Time	Assigned To	Hours (L:R)
Skilled Ncwr Probems visit	Not Yet Started	medicare	Nov 18, 2021 12:00 AM	Nov 18, 2021 12:01 AM	Diandra Enging	1
OT Pediatric Visit	Completed	medicare	Nov 13, 2021 12:00 AM	Nov 13, 2021 03:00 AM	Akshaykumar Bhatia	3
Infection Log	Open		Nov 15, 2021 10:00 PM	Nov 15, 2021 10:00 PM	Aracelis Baez	1
Wound Assessment	Completed	medicare	Nov 15, 2021 12:00 AM	Nov 15, 2021 12:01 AM	Ashly N. Thomas	1
New medical assessment	Not Yet Started	medicare	Nov 18, 2021 10:00 AM	Nov 18, 2021 11:00 AM	Celestina Roeder	1

Client's Calendar View

Once a client is selected, the calendar will display:



If the List Task view is displayed, selecting **Hide List** will revert to the calendar view. Selecting the client's name is a quick link to the Client's Chart. Hovering over a scheduled task to see the quick details. Select the **Message Employee** hyperlink to message the employee assigned to the task. Select the house icon next to EVV time to view the task's EVV details.



Schedule Comments - Users can view, add, edit, and delete schedule comments by selecting **Schedule Comments** from the quick details' menu or from the **Actions** column when viewing the Schedule Center in list view.

Name	Last Modified	Comment	Actions
NELSON, BRIAN	06/11/2020 - 7:30 PM	Called Ethel and she said she was not available.	Edit Delete
NELSON, BRIAN	06/11/2020 - 8:07 PM	Called Ivette and she said she needs to check her schedule and will call back tomorrow 8/11.	Edit Delete

[Add Comment](#)

[Close](#)

Select the **Edit** hyperlink under the Actions column to make updates or select the **Delete** hyperlink to remove the comment. To add a new schedule comment, select the **Add Comment** button. Enter the comment and select **Save & Close** to save the comment or **Save & Add Another** to continue adding schedule comments to the task.

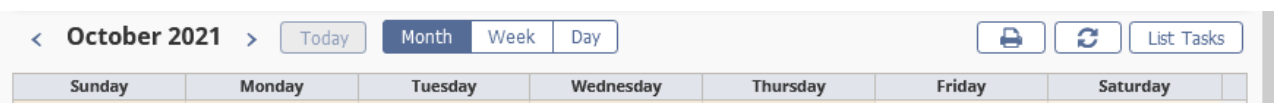
Add Comment

Comment *

[Save & Close](#)
[Save & Add Another](#)
[Cancel](#)

Users may view the Client Schedule in month, week or day formats by selecting the corresponding action. The default view is by month.

Depending on the view selected, the arrows will move to the prior or next day/week/month.



The printer icon will print the schedule (permission-based). The rotating circle icon is a page refresh.

Selecting **List Tasks** displays the client schedule in list format. The color legend is located below the calendar for easy reference:



- **Blue** = Scheduled task
- **Green** = Completed task
- **Red** = Missed visit
- **Peach** = Care period
- **Yellow** = Next care period
- **Gold** = Unassigned task
- **Orange** = Returned task
- **Grey** = No Access to task
- **Red Border** = Outlined in a red border is unauthorized

List Task View

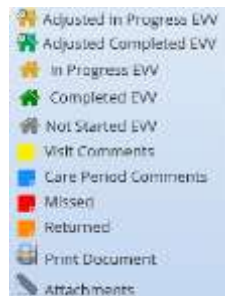
Selecting **List Tasks** displays the client schedule in list format. The **List Task** button is also available at the bottom right-hand side of the page.

Above the list task’s view, a menu bar displays with the following:

Task	A	Payment Source	Start Time	End Time	Employee	Status
PT Pediatric Visit		medicare	11/01/21 12:15 AM	11/01/21 1:15 AM	Rupali Kaware RN	Submitted Pending Co-Signature

- Task - The name associated with the service being performed.
- Red A - Indicates tasks that do not have an associated required authorization. The task will also have a red border in the calendar view.
- Payment Source - The identified payer of the task.
- Start Time - Scheduled date and start time of the task or shift.
- End Time - Scheduled date and end time of the task or shift.
- Employee - The caregiver scheduled to perform the task.
- Status - The status of the task or shift.

- Untitled Columns - The columns without titles will display the following icons:
 - EVV - Permission-based electronic visit verification details.
 - A yellow house represents EVV that is in progress.
 - A green house is a completed visit.
 - A gray house is available for all visits and is used to manually document EVV information when a caregiver is unable to connect to the internet during a visit.
 - Visit Comments - Notes associated with that task. Notes are added from the Action column's **Details** option.
 - Care Period Comments - Notes associated with the care period. These comments are entered at the care period level (*Care Period/New* or *List Care Periods/Edit*).
 - Missed - Comments related to the reason the task was missed.
 - Returned - Comments related to the reason the task was returned.
 - Print Document - Select this to view the document.
 - Attachments - Presents when attachments are associated with the task. Selecting will present the attachment.



- Action Column - The options in this column are permission-based and contingent on the status of the task. Tasks that have not yet been completed may have the following options associated:



- Details - Opens the detail page of the task allowing viewing/editing of the scheduled date/time; payment source, caregiver, mileage/travel/surcharge information and the ability to enter comments (yellow sticky) and attachments.
- Missed Visit Form - Allows the documentation of a missed visit or shift.
- Reassign - Ability to quickly reassign a task to another user.
- Delete - Removes the task.
- Schedule Comments – See above.

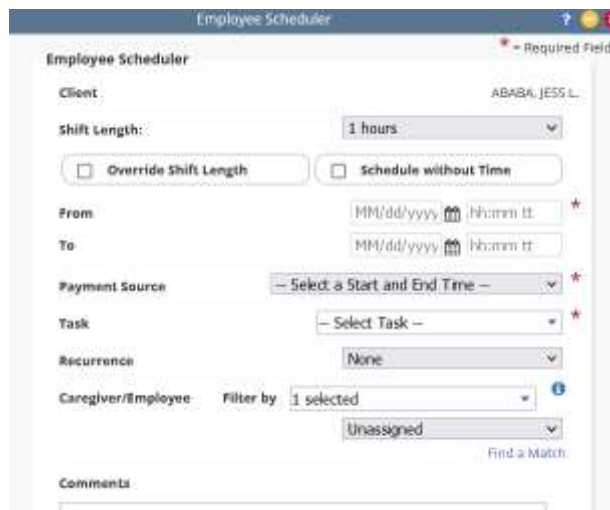


The completed tasks, on the other hand, have fewer actions available. **Details** and **Delete** are the same actions, while **Reopen** will reopen the task. To hide the list task view, select the **Hide List** view.

Scheduling Visits to a Client

There are two ways to schedule a task: One way is by selecting the calendar day or by selecting *New/Client Task*.

Both paths open the Employee Scheduler window. Selecting the calendar day will pre-populate the date in the new task schedule window. The date will be entered manually when using the new task route.



Employee Scheduler

Client: ABABA, JESS L.

Shift Length: 1 hours

Override Shift Length Schedule without Time

From: MM/dd/yyyy hh:mm tt

To: MM/dd/yyyy hh:mm tt

Payment Source: - Select a Start and End Time -

Task: - Select Task -

Recurrence: None

Caregiver/Employee: Filter by 1 selected

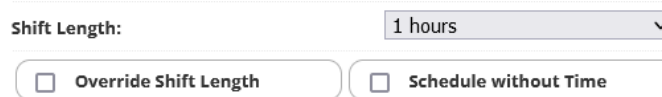
Unassigned

Find a Match

Comments

The following are further details for the Employee Scheduler, each piece and what it allows the organization for scheduling purposes:

Shift Length - Includes three options: a drop-down selection which automatically calculates the 'To' time once the shift start time is entered; Override the shift length allows manual input of the shift in and out times.



Shift Length: 1 hours

Override Shift Length Schedule without Time

From and To - Organizations will place the date of service in the from and to areas. If the organization selects a shift length hour from the drop-down selection once they place the start time, it will automatically calculate the end time. If override shift length is selected, then the organization will set their own start and end time. If the organization selects to schedule without time, then the start and end time will disappear.



From: MM/dd/yyyy h:mm tt

To: MM/dd/yyyy h:mm tt

Payment Source: -- Select a s

Task: -- Se

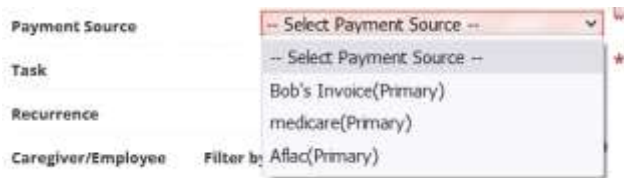
Recurrence

Caregiver/Employee: Filter by: 1 select

Calendar view for November 2021:

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

Payment Source - Once the from and to fields are populated, the payment source list will display all client payers that cover scheduled date. Select the payment source paying for the scheduled task.



Payment Source: -- Select Payment Source --

Task: -- Select Payment Source --

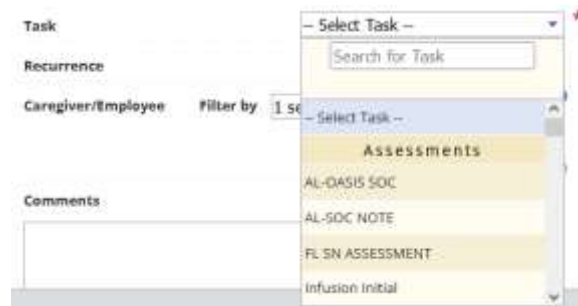
Recurrence

Caregiver/Employee: Filter by: Aflac(Primary)

Dropdown list items:

- Select Payment Source --
- Bob's Invoice(Primary)
- medicare(Primary)
- Aflac(Primary)

Task - Select the task being scheduled. The task list is ordered by category and may contain the following based on the types of documents the organization has created: Assessments, visit notes, care plans, orders, coordination of care and supervisory. Search by name or scroll through the list.



Recurrence - The recurrence feature enables the organization to easily schedule the same task out multiple times based on the client's specified need. If a recurrence schedule is used, the user must indicate an end date of the recurrence and for the daily or weekly options of how often the task repeats.



Recurrence Options:

None - No recurrence needed.

Daily - Task recurs every 'X' number of days until the end date is reached.

Weekly - Task repeats every 'X' number of weeks on the days selected.

Monthly - Task repeats every 'X' number of months on the selected day of the month or the day of the week.

Flexible - Useful for tasks that do not recur in a set pattern. Select the days the task needs to occur on. There is a current limit of 31 scheduling events that may be scheduled at a time.

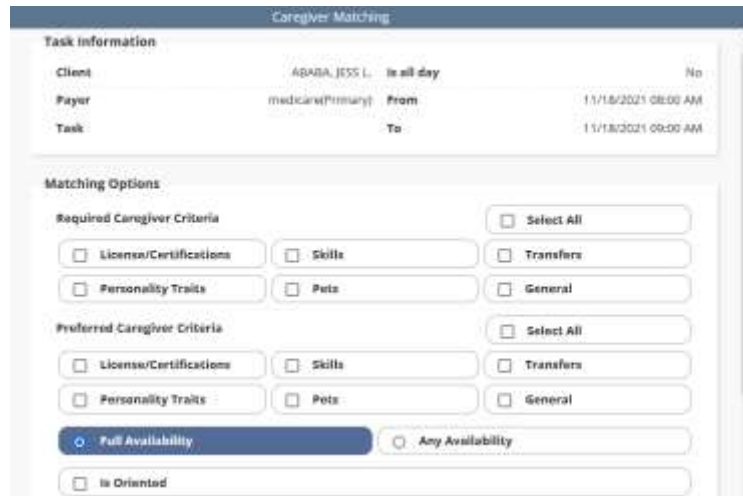
60 Days - Task repeats every 60 days. A new dropdown will appear below with a 'Repeat Until' calendar.

Caregiver/Employee - Indicates who will be completing the task. Three selections are available:

Unassigned - If there is not an identified caregiver for the shift, the task may be set up as unassigned (open). Unassigned tasks appear yellow on the client schedule for easy identification. Once a caregiver is identified, the task may be reassigned to the user.

Assign to Caregiver/Employee - If a staff member has been identified, the drop-down user list may be used to select the staff. The staff that has been identified as oriented and favorite will show at the top of the list for easy selection. The list will also filter as a user's name is typed (when the drop-down list is open).

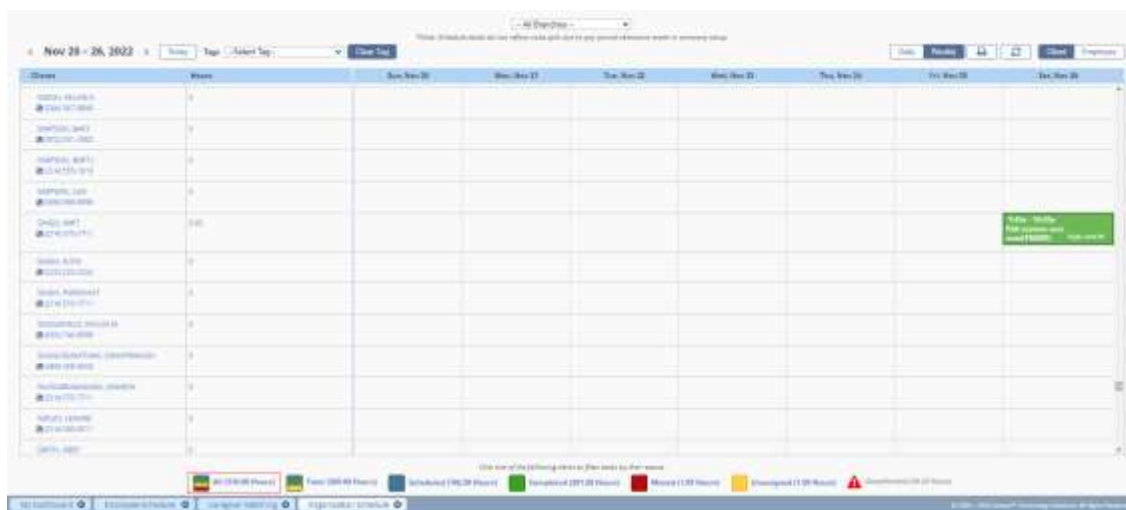
Find a Match - The last option is to search for suitable matches based upon the match criteria set up for the clients and employees.



Comments and Save - The last step in scheduling is to add any comments about the tasks to be scheduled. These show up as a yellow sticky note on each task scheduled. Once all the information is entered completed, the organization can **Save & Close**, which will add the task(s) to the client schedule. If the user chooses, they can **Save & Add Another** task for the client.

Organization Schedule

The Organization Schedule shows all visits scheduled to employees of the organization. The functionality is like the Schedule Center, but instead of searching for clients individually, they are all shown in the grid.



Choose a specific branch (if more than one) schedule by selecting the drop-down menu. View the calendar by week or by day. Move through each week or day by selecting the left and right arrows in the top left of the screen. Print the schedule by selecting the printer icon. Refresh the page by selecting the refresh icon. The schedule defaults to viewing all clients but can be changed to users by selecting the **Employee** button.



Hovering over a scheduled task to see the quick details. Select the **Message Employee** hyperlink to message the employee assigned to the task. Select the house icon next to EVV time to view the task's EVV details.

Users can view, add, edit and delete schedule comments by selecting **Schedule Comments** from the Quick Details menu.

Client - The schedule grid is split into active and pending patients. Selecting the drop-down arrow will collapse each respective group. Select the client's name hyperlink for a direct link to Schedule Center that is pre-filtered for the client. The hours scheduled to the client is to the right of their name based on which filter is selected at the bottom of the page.

The summary at the bottom of the screen filters the schedule's results and displays the number of hours associated with each status. All hours is the number of combined scheduled, completed, missed and unassigned hours. Total hours is the number of combined scheduled, completed and unassigned hours




Employee - Select the **Employee name** hyperlink for a direct link to Schedule Center that is pre-filtered for the employee. The hours scheduled to the client is to the right of their name based on which filter is selected at the bottom of the page.

Employees	Hours	Sun, Jul 19	Mon, Jul 20	Tue, Jul 21	Wed, Jul 22	Thu, Jul 23	Fri, Jul 24	Sat, Jul 25
T Active								
ABBOT, MATT	50.67 		7:00a - 12:00p Custom Visit - Mobile ABBOTT, JARVIS	7a - 12p Custom Visit - Mobile ABBOTT, JARVIS	12p - 12:45p Custom Visit - Mobile ABBOTT, JARVIS	7a - 12p Custom Visit - Mobile ABBOTT, JARVIS	7a - 12p Custom Visit - Mobile ABBOTT, JARVIS	7a - 12p Custom Visit - Mobile ABBOTT, JARVIS
			3p - 7p Custom Visit - Mobile ABBOTT, JARVIS	3p - 7p Custom Visit - Mobile ABBOTT, JARVIS	12:00p - 12:45p Custom Visit - Mobile ABBOTT, JARVIS	3p - 7p Custom Visit - Mobile ABBOTT, JARVIS	3p - 7p Custom Visit - Mobile ABBOTT, JARVIS	3p - 7p Custom Visit - Mobile ABBOTT, JARVIS
ABUJARJA, LAWEEC	0							
ACEVEDO, ROSA	0							
ADAMS, STACE	0							
ADEFUYE, TOSIN	0							
ADITYAN, MALIK	0							
AZNOCKTE, CLIENT	0							

Click one of the following items to filter tasks by their status.

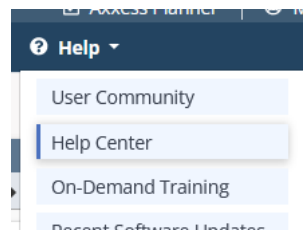
 All (284.42 Hours)
 Total (280.42 Hours)
 Scheduled (208.17 Hours)
 Completed (72.25 Hours)
 Mixed (4.00 Hours)
 Estimated Overtime (20.67 Hours)

The hours column displays the number of hours scheduled for the day or week and updates based on which filter is selected at the bottom of the page. If an employee has been scheduled over 40 hours for the week, a yellow warning icon  will appear next to the employee's name in the hour's column. The summary at the bottom of the screen filters the results of the **Agency Schedule** and displays the number of hours associated with each status. The only difference from the client organization schedule filters is the estimated overtime filter.

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/>

