

HIS SUBMISSION TRAINING MANUAL

May 2023

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MENU

Home/HIS Export Manager

Users can manage the exporting of HIS documents from the **Pending Approval**, **Export Ready** and **Export History** tabs.

Pending Approval		Export Ready	Export History					
Search by Patient Name		07/22/2020 - 10/29/2020	Select HIS Export Type	Approve Selected				
<input type="checkbox"/>	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Actions	
<input type="checkbox"/>	33 days overdue	Adams, Scarlett	AxxessRCM Test Payor	Admission View Admission	09/03/2020	09/04/2020 02:21 AM	Approve	Edit
<input type="checkbox"/>	35 days overdue	Again, Checking	Medicare	Admission View Admission	09/01/2020	10/03/2020 05:52 AM	Approve	Edit
<input type="checkbox"/>	10 days	Agarwal, Tarun	AxxessRCM Test Payor	Admission View Admission	10/16/2020	10/17/2020 02:39 AM	Approve	Edit
<input type="checkbox"/>	76 days overdue	Baba, all	Blue Cross Blue Shield	Discharge	07/29/2020	10/17/2020 02:30 AM	Approve	Edit
<input type="checkbox"/>	55 days overdue	Bacon, Chris	AxxessRCM Test Payor	Admission View Admission	08/12/2020	10/06/2020 02:23 AM	Check Errors	Edit
<input type="checkbox"/>	5 days overdue	bb, aa	Medicare	Admission View Admission	10/01/2020	10/15/2020 03:37 PM	Approve	Edit
<input type="checkbox"/>	68 days overdue	Belcher, Bob	AxxessRCM Test Payor	Discharge	08/06/2020	08/08/2020 09:47 AM	Approve	Edit
<input type="checkbox"/>	68 days overdue	Benson, Joel	Medicare	Discharge View Discharge	08/06/2020	08/08/2020 09:37 AM	Check Errors	Edit

In each tab, search for patients by their name in the search bar, change the date range of HIS by selecting the date range bar, choose the HIS export type or the branch (if more than one).

Search by Patient Name	11/30/2021 - 02/28/2022	Select HIS Export Type	All Branches
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PENDING APPROVAL

Where the reviewer can make changes to the HIS as needed. The reviewer will be able to sign in Z0400 for any changes they make, and be able to approve the HIS and sign in Z0500 that the HIS is completed. After the HIS is approved, it will be moved to the **Export Ready** tab. Admission HIS will have a countdown for approval of admission date + 14 days, and the Discharge HIS will have a countdown for approval of discharge date + seven days.

Pending Approval							
Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Actions	
0 days	Hospice, Janet	Charity	Discharge	10/13/2020	10/14/2020 04:16 AM	Approve	Edit
3 days	Me, Music	Blue Cross Blue Shield of Illinois	Admission	10/09/2020	10/10/2020 04:40 AM	Approve	Edit
8 days	West, Atlanta	Medicare	Admission 1 Inconsistencies	10/14/2020	10/15/2020 07:23 AM	Approve	Edit

The dots next to each line represent the timing of when HIS is due. ● ● ●

- Green = More than five days remaining
- Orange = Five to one day(s) remaining
- Red = Zero days remaining or overdue

Each line will show the days remaining, patient name (selected will go to patient chart), payer, type (selected will go to HIS), admit/discharge date and last modified on. The Action column hyperlinks allow users to **Approve**, **Check Errors** or **Edit** the HIS.

Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Actions	
8 days	West, Atlanta	Medicare	Admission 1 Inconsistencies	10/14/2020	10/15/2020 07:23 AM	Approve	Edit

Review HIS

If a file contains inconsistencies, a blue badge will appear in the **Type** column displaying the number of inconsistencies in the document. Warnings will be displayed with an orange badge with the number of warnings shown. Errors will display a red badge.

Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Actions	
Overdue	Alexander, Feargus	Medicare	Admission 1 Inconsistency 1 Warning	02/01/2022	02/24/2022	Approve	Edit

Select **Edit** to open the document. A blue banner at the top of the screen will show inconsistencies, errors and/or warnings in the file. Use the arrows on the right side of the banner to review each section of the document that has been flagged.

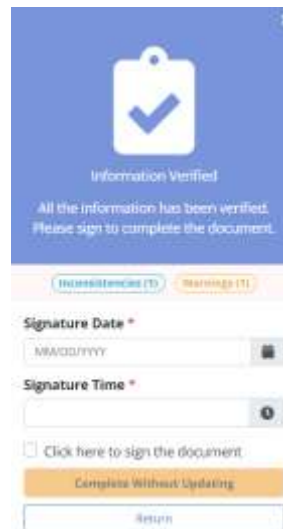


Update the documentation as needed to correct any inconsistencies, warnings or errors. Select **Save** to save your changes or **Cancel** to return to the HIS Export Manager without saving changes. Select **Check Errors** at any time to re-run the HIS scrubber.

Approving HIS

Once the documentation has been reviewed and all necessary changes have been made, select the **Approve** hyperlink to approve the HIS file. If any changes were made to the document, the HIS scrubber will run again to check for any new or remaining inconsistencies, warnings or errors. The system will require users to correct any errors before approving an HIS file. The system will not require users to correct inconsistencies or warnings before approving an HIS file.

To approve an HIS file without correcting inconsistencies/warnings, enter a signature date and time then select the sign checkbox. To complete, select the **Complete Without Updating** button. Select **Return** to navigate back to the flagged areas and make corrections in the documentation before approving the file.



Approve multiple HIS documents by selecting the check box(es) on the left side of the page and then select the **Approve Selected** button in the top right.

Search by Patient Name: 10/06/2020 - 10/20/2020 Select HIS Export Type

2 [Approve Selected](#)

1	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Actions
<input checked="" type="checkbox"/>	10 days	Agarwal, Tarun	AxxessRCM Test Payor	Admission 6 Inconsistencies	10/16/2020	10/17/2020 02:39 AM	Approve Edit
<input checked="" type="checkbox"/>	0 days	Hospice, Janet	Charity	Discharge	10/13/2020	10/14/2020 04:16 AM	Approve Edit
<input checked="" type="checkbox"/>	10 days	Jayson, Stacey	AxxessRCM Test Payor	Admission 6 Inconsistencies	10/16/2020	10/17/2020 01:22 AM	Approve Edit

EXPORT READY

Where all HIS awaiting export are located. The countdown for submission is 30 days after the admission or discharge date. Users can create export files of individual files or perform a bulk submission. Once the files are downloaded into the appropriate format, they are found in the downloads folder on the user's computer. From there, submit the HIS per organization guidelines and then return to this page to mark the HIS as submitted.

Pending Approval **Export Ready** Export History

Search by Patient Name: 12/16/2021 - 03/16/2022 Select HIS Export Type: All Branches [Mark Selected as Exported](#) [Generate HIS File](#) [Update Status](#)

Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Approved Date	Actions
3 days	Al Bakushi, Issa	AxxessRCM Test Payor	Admission	02/16/2022	02/24/2022	Mark as Exported Generate HIS File Update Status
12 days overdue	Alexander, Feorgus	Medicare	Admission	02/01/2022	03/10/2022	Mark as Exported Generate HIS File Update Status
3 days	Mahajan, Bhushan	AxxessRCM Test Payor	Admission	02/16/2022	02/18/2022	Mark as Exported Generate HIS File Update Status

3 total results Show 10 entries

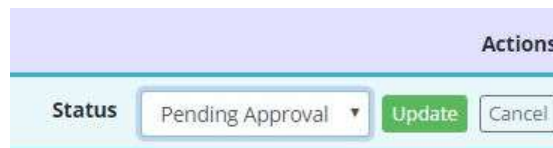
Each line will show the days remaining, patient name (selected will go to patient chart), payer, type, admit/discharge date and approved date. The **Action** column hyperlinks allow users to **Mark as Exported** or **Generate HIS File**.

Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Approved Date	Actions
12 days overdue	Un, Kim	Medicare	Admission	09/07/2020	09/07/2020	Mark as Exported Generate HIS File Update Status

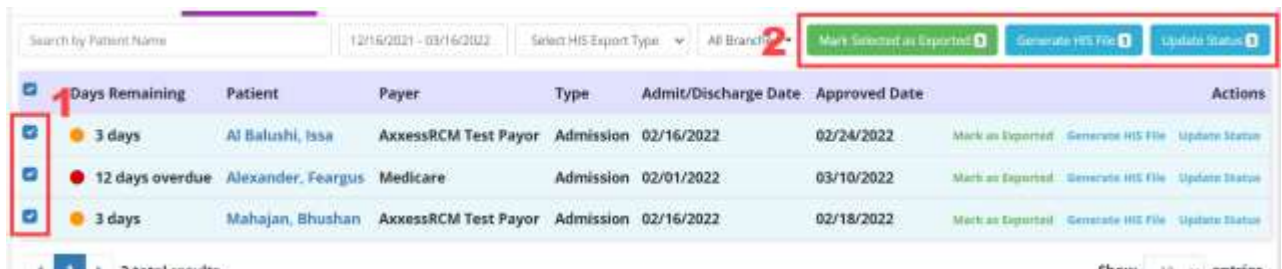
Select the **Update Status** hyperlink and choose to update to the following statuses:

- Pending Approval - Select this option to move the file to **Pending Approval** where information in the file can be updated. Once ready, the file can then be approved to Export Ready status.
- Export Ready - Select to move the file to **Export Ready** where an .xml file can be generated for submission to CMS. Once ready, it can be marked as Exported.
- Exported - Select to move the file to **Export History** in Exported status to indicate that the file has been submitted to CMS.
- Accepted - Select to move the file to **Export History** in Accepted status to indicate the file has been accepted by CMS.
- Rejected - Select to move the file to **Export History** in Rejected status to indicate that the file has been rejected by CMS.

Once a status is selected, select the green **Update** button. Confirm the action by selecting **Yes, Change**. Select **No** if selected by mistake.



You can mark multiple HIS documents as exported, generate multiple HIS files or their statuses by selecting the check box(es) on the left side of the page and then select the **Mark Selected as Exported**, **Generate HIS File** or **Update Status** button in the top right.



Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Approved Date	Actions
3 days	Al Balushi, Issa	AxxessRCM Test Payor	Admission	02/16/2022	02/24/2022	Mark as Exported Generate HIS File Update Status
12 days overdue	Alexander, Feargus	Medicare	Admission	02/01/2022	03/10/2022	Mark as Exported Generate HIS File Update Status
3 days	Mahajan, Bhushan	AxxessRCM Test Payor	Admission	02/16/2022	02/18/2022	Mark as Exported Generate HIS File Update Status

There is an option in Company Setup for organizations to stop claims from being submitted if the HIS has not been exported. This setting is permissions based.

EXPORT HISTORY

Once the organization receives the file indicating if it was approved or rejected, users can update the status by selecting the **Update Status** hyperlink in the **Actions** column. Users can also create correction or cancellation files by

selecting **Make a Correction** and **Generate Cancel** hyperlinks in the **Actions** column.

Pending Approval Export Ready **Export History**

Search by Patient Name 07/01/2020 - 10/20/2020 3 status Selected Select HIS Export Type [Update Status](#)

<input type="checkbox"/>	Patient	Payer	Type	Status	Admit/Discharge Date	Exported Date	Actions
<input type="checkbox"/>	Colour, Blue	Blue Cross Blue Shield	Admission	Exported	08/08/2020	10/10/2020	Generate Cancel Make a Correction Update Status
<input type="checkbox"/>	Colour, Blue	Blue Cross Blue Shield	Discharge	Exported	09/25/2020	10/10/2020	Generate Cancel Make a Correction Update Status

1 2 total results Show 10 entries

Select the check box(es) on the left side of multiple rows and select the **Update Status** button in the top right to update statuses in bulk.

Search by Patient Name 07/01/2020 - 10/20/2020 3 status Selected Select HIS Export Type [Update Status](#)

<input checked="" type="checkbox"/>	Patient	Payer	Type	Status	Admit/Discharge Date	Exported Date	Actions
<input checked="" type="checkbox"/>	Colour, Blue	Blue Cross Blue Shield	Admission	Exported	08/08/2020	10/10/2020	Generate Cancel Make a Correction Update Status
<input checked="" type="checkbox"/>	Colour, Blue	Blue Cross Blue Shield	Discharge	Exported	09/25/2020	10/10/2020	Generate Cancel Make a Correction Update Status

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 on all our Axxess products. To access the Help Center, navigate to the **Help** tab and select **Help Center** or go to <https://www.axxess.com/help/>.

