

HOSPICE ORDERS MANAGEMENT TRAINING MANUAL

May 2023

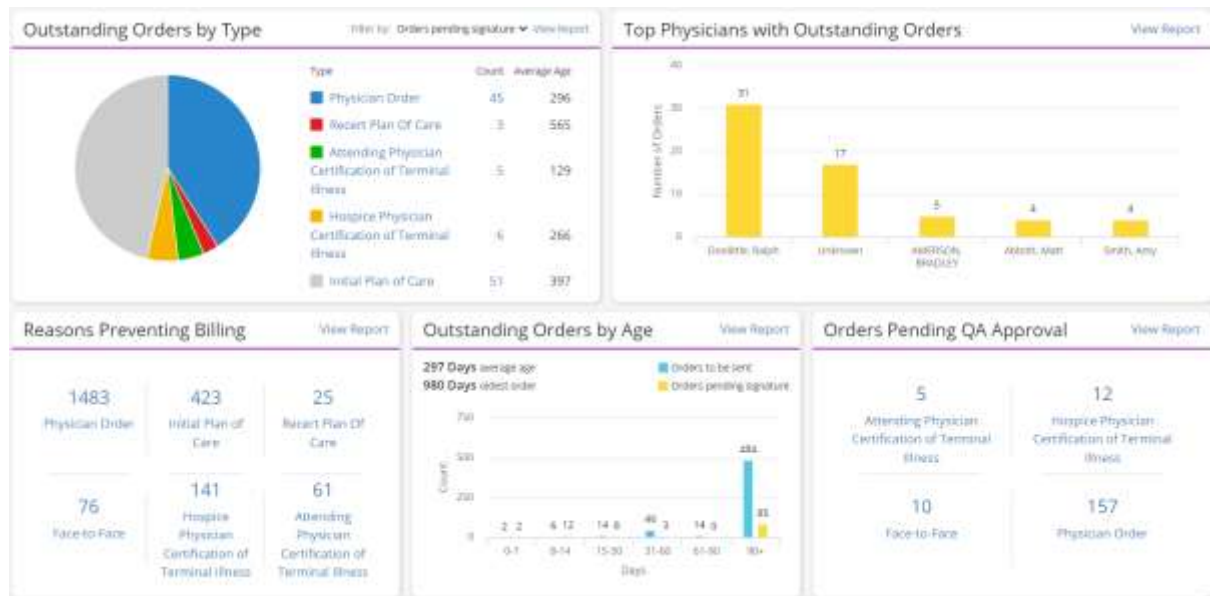
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ORDERS DASHBOARD

Reports/Orders Dashboard

The Orders Dashboard will show an organization's outstanding physician orders, plans of care, certifications of terminal illness and face-to-face visit documentation that may be holding up billing. This will help assist organizations to quickly identify issues and resolve them.



Orders Dashboard has five tiles:

1. Reasons Preventing Billing - This tile shows outstanding physician orders, plans of care, certifications of terminal illness, and face-to-face visits for patients who have a claim that cannot be billed due to outstanding documents. By selecting the hyperlink title in each area, the user will be able to go to the **Orders Management** page, which shows the patients (and physicians) who have outstanding documents. Select the **View Report** hyperlink to see the Reasons Preventing Billing report.
2. Outstanding Orders by Age - This tile shows aging orders and allows an organization to see orders that are outstanding. This shows a breakdown of orders that have and have not been sent to the physician for signature. The graph is interactive and when an area is selected, it will take the user to a list showing the orders by age. Select the **View Report** hyperlink to see the Outstanding Orders by Age report.
3. Orders Pending QA Approval - This tile shows the orders and documents awaiting approval by Quality Assurance and are unable to be sent out for



- signature. Selecting any of the hyperlinks in this section takes the user to the QA Center to be able to quickly approve the orders, so they are ready to be sent for signature. Select the **View Report** hyperlink to see the Orders Pending QA Approval report.
4. Outstanding Orders by Type - This tile shows the orders and documents that are outstanding by type. It also allows the user to filter by orders that are pending signature and orders that have not yet been sent. The count is a hyperlink that takes the users to an Orders Management list view of only that type of document, so the user can see documents, physicians and age of the outstanding document. Select the **View Report** hyperlink to see the Outstanding Orders by Type report.
 5. Top Physicians with Outstanding Orders - This interactive graph allows the user to see the physicians who have the most outstanding orders/documents. It takes the user to the list view of these documents by the physician. Select the **View Report** hyperlink to see the physicians with Outstanding Orders report.

ORDERS MANAGEMENT

Patients/Orders Management

Use the search bar to find a specific order. Filtering is the same for all tabs. Search by patient name, physician, type, order date, age, branch, team or delivery method.



Select the patient hyperlink to go straight to the Patient Chart. Print orders individually by selecting the  icon under the **Action** column. Download orders by selecting the  icon.

Orders are split into three tabs:

1. **To Be Sent** - This section shows orders ready to be sent for signature. Orders are displayed by age, patient, team, physician, delivery method, type, order number, order date and date approved.

To Be Sent Pending Signature Completed Orders

Search by Patient Name Search by Physician Type to Filter Type... Order Date Age: All Branch: All Team: All Delivery Method: All

[Mark Selected as Sent](#)

<input type="checkbox"/>	Age of Order	Patient	Team	Physician	Delivery Method	Type	Order Number	Order Date	Date Approved	Actions
<input type="checkbox"/>	725 days	Strom, Yoni	Team WMA	Ralph Daulton	Non-Insurance	Relax Plan of Care	204803	04/06/2021	02/22/2022	Mark as Sent Update Delivery Method
<input type="checkbox"/>	722 days	Sark, Top	Team WMA	Ralph Daulton	Non-Insurance	Physician Order	91981	04/08/2021	04/08/2021	Mark as Sent Update Delivery Method
<input type="checkbox"/>	725 days	American, David	WendyLin	Hevdy American	Fee	Hospice Physician Certification of Terminal Illness	93230	04/12/2021	02/22/2022	Mark as Sent Update Delivery Method
<input type="checkbox"/>	729 days	Wideman, Lori	Team WMA	Ralph Daulton	Non-Insurance	Altering Physician Certification of Terminal Illness	93236	04/12/2021	02/22/2022	Mark as Sent Update Delivery Method
<input type="checkbox"/>	727 days	Marchus, Wynell	Axcess Team	Ralph Daulton	Non-Insurance	Initial Plan of Care	204807	04/14/2021	02/22/2022	Mark as Sent Update Delivery Method
<input type="checkbox"/>	727 days	Sark, Barbara	Axcess Team	Ralph Daulton	Non-Insurance	Initial Plan of Care	204805	04/14/2021	02/22/2022	Mark as Sent Update Delivery Method
<input type="checkbox"/>	727 days	Stable, Jill, RCH, M	Axcess Team	Ralph Daulton	Non-Insurance	Initial Plan of Care	204809	04/14/2021	02/22/2022	Mark as Sent Update Delivery Method
<input type="checkbox"/>	727 days	Rubin, Jonathan	Axcess Team	Ralph Daulton	Non-Insurance	Initial Plan of Care	204871	04/14/2021	02/22/2022	Mark as Sent Update Delivery Method
<input type="checkbox"/>	727 days	Rubin, Jonathan	Axcess Team	Ralph Daulton	Non-Insurance	Physician Order	93974	04/14/2021	02/22/2022	Mark as Sent Update Delivery Method
<input type="checkbox"/>	727 days	M, Rich	Axcess Team	Ralph Daulton	Non-Insurance	Initial Plan of Care	12840	04/14/2021	05/04/2021	Mark as Sent Update Delivery Method

1 2 3 4 5 6 7 8 9 589 total results Show 10 entries

Select the **Update Delivery Method** hyperlink to change the delivery method. Mark individual orders as sent by selecting the green **Mark as Sent** hyperlink or select checkboxes to the left of orders. Then select the **Mark Selected as Sent** button at the top right. The number of orders selected will show on the right side of the button. To select all orders, select the top-left checkbox in the purple header.

Branch: All Team: All

[Mark Selected as Sent](#) 2

<input type="checkbox"/>	Age of Order	Patient	Team	Physician	Type	Order Date	Date Approved	Order Preview	Actions
<input checked="" type="checkbox"/>	6 days	Smith, John	Axcessians	OWAIS LODHI	Initial Plan of Care	10/16/2020			Mark as Sent
<input checked="" type="checkbox"/>	9 days	Witt, Isaac	Charles Team	Glenn Johnson	Physician Order	10/13/2020	10/13/2020		Mark as Sent
<input checked="" type="checkbox"/>	15 days	Witt, Isaac	Charles Team	Glenn Johnson	Physician Order	10/07/2020	10/13/2020		Mark as Sent

- Pending Signature** - This section shows orders that have been sent for signature and are expected back. Orders are displayed by age, patient, team, physician, delivery method, type, order number, order date and sent date.

To Be Sent										Pending Signatures		Completed Orders	
Search by Patient Name		Search by Physician		Type to Filter Type	Order Date	Age: All	Branch: All	Team: All	Delivery Method: All	Mark Selected as Received		Marking Status	
<input type="checkbox"/>	Age of Order	Patient	Team	Physician	Delivery Method	Type	Order Number	Order Date	Sent Date	Actions			
<input type="checkbox"/>	118 days	Pegerson, Judy	MWR	DAVE ALEXANDER	Physician Order	359851	12/18/2022	12/21/2022	Mark as Received Update Status				
<input type="checkbox"/>	118 days	Pegerson, Judy	MWR	DAVE ALEXANDER	Initial Plan of Care	359850	12/14/2022	12/21/2022	Mark as Received Update Status				
<input type="checkbox"/>	130 days	Cox, Benedict	Team One	Jake Test	Mail	Initial Plan of Care	351713	11/29/2022	12/07/2022	Mark as Received Update Status			
<input type="checkbox"/>	134 days	Robert, Carlos	Tact Hospice 1	David Test	AXCESS Physician Portal	Initial Plan of Care	354523	11/28/2022	12/09/2022	Mark as Received Update Status			
<input type="checkbox"/>	134 days	Jones, Jerome	AAA Health Team	DOODLE DOODLE	Initial Plan of Care	346906	11/28/2022	12/07/2022	Mark as Received Update Status				
<input type="checkbox"/>	141 days	Access Academy, Selby	Access Academy 2023	Ralph Doolittle	Mail	Initial Plan of Care	343838	11/21/2022	12/07/2022	Mark as Received Update Status			
<input type="checkbox"/>	142 days	Adkins, Aditya	DMZ Team	Ralph Doolittle	Mail	Initial Plan of Care	344529	11/20/2022	12/07/2022	Mark as Received Update Status			
<input type="checkbox"/>	144 days	Blissell, Doretha	ASC Team	ILUSAN/SABRINA	Initial Plan of Care	341478	11/18/2022	12/07/2022	Mark as Received Update Status				
<input type="checkbox"/>	145 days	Powell, Jake	Access Team	Glenn Johnson	Physician Order	341316	11/17/2022	12/07/2022	Mark as Received Update Status				
<input type="checkbox"/>	148 days	Robles, James	All Health Team	DOODLE DOODLE	Initial Plan of Care	350642	11/18/2022	12/07/2022	Mark as Received Update Status				

Mark individual orders as received by selecting the green **Mark as Received** hyperlink under the Actions column. The received date populates with the current date. Enter the signed date, then select the **Mark** button.

<input type="checkbox"/>	21 days	Hospice, Jake	Matt's Testing Team	Matt Abbott	Physician Order	10/01/2020	10/20/2020	Marking in Progress							
<table border="1"> <tr> <td>Received Date</td> <td>Signed Date</td> </tr> <tr> <td>10/22/2020</td> <td>MM/DD/YYYY</td> </tr> <tr> <td colspan="2"> <input type="button" value="Mark"/> <input type="button" value="Cancel"/> </td> </tr> </table>										Received Date	Signed Date	10/22/2020	MM/DD/YYYY	<input type="button" value="Mark"/> <input type="button" value="Cancel"/>	
Received Date	Signed Date														
10/22/2020	MM/DD/YYYY														
<input type="button" value="Mark"/> <input type="button" value="Cancel"/>															

To change the status of individual orders, select the green **Update Status** hyperlink under the Actions column. Change the status in the drop-down menu and select the **Update** button.

<input type="checkbox"/>	2 days	Mahajan, Bhushan	Access Academy	Ralph Doolittle	Mail	Initial Plan of Care	02/16/2022	Status	To Be Sent	<input type="button" value="Update"/>	<input type="button" value="Cancel"/>
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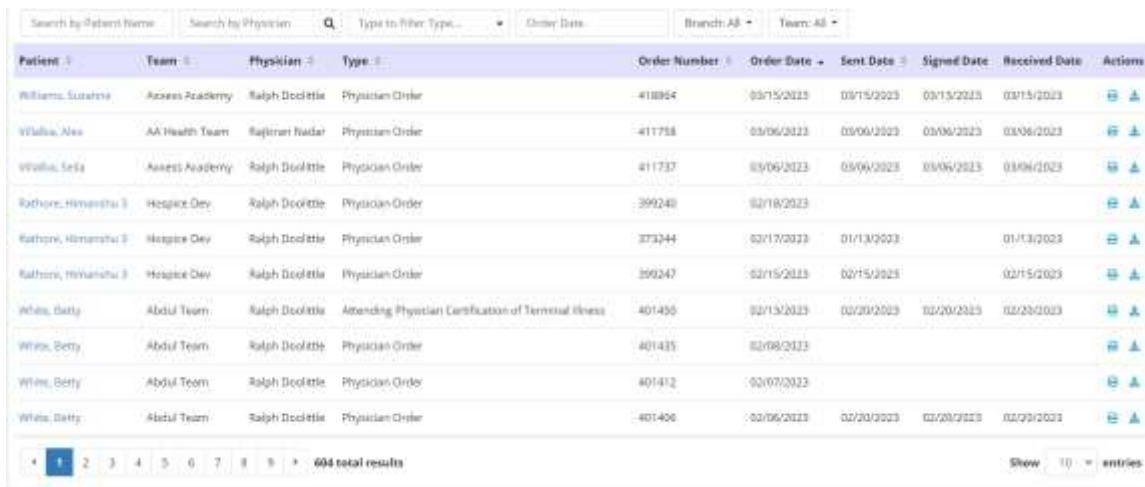
To mark multiple orders, select checkboxes to the left of orders, then select the **Mark Selected as Received** button at the top right. The number of orders selected will show on the right side of the button. Select the top-left checkbox in the purple header to select all orders.



Age of Order	Patient	Team	Physician	Delivery Method	Type	Order Date	Sent Date	Order Preview	Actions
1 days	hills, jim bob	Access Team	Jose Lopez	IDG	Physician Order	02/17/2022	02/17/2022		<input checked="" type="checkbox"/> Mark as Received Update Status
1 days	Adams, Wednesday	Team WMA 2	Jose Lopez	IDG	Physician Order	02/17/2022	02/17/2022		<input checked="" type="checkbox"/> Mark as Received Update Status

To update the status of multiple orders, select the checkboxes to the left of orders, then select the **Update Status** button at the top-right. The number of orders selected will show on the right side of the button. Select the top left checkbox in the purple header to select all orders.

- Completed Orders** - This section shows orders that are signed and received. Orders are displayed by patient, team, physician, type, order number, order date, sent date, signed date and received date.



Patient	Team	Physician	Type	Order Number	Order Date	Sent Date	Signed Date	Received Date	Actions
Williams, Suzanne	Access Academy	Ralph Doolittle	Physician Order	418864	03/15/2023	03/15/2023	03/15/2023	03/15/2023	
Widala, Alex	AA Health Team	Rajivraj Nadar	Physician Order	411758	03/06/2023	03/06/2023	03/06/2023	03/06/2023	
Widala, Sara	Access Academy	Ralph Doolittle	Physician Order	411737	03/06/2023	03/06/2023	03/06/2023	03/06/2023	
Rathore, Himanshu	Hospice Dev	Ralph Doolittle	Physician Order	399240	02/18/2023				
Rathore, Himanshu	Hospice Dev	Ralph Doolittle	Physician Order	373244	02/17/2023	01/13/2023		01/13/2023	
Rathore, Himanshu	Hospice Dev	Ralph Doolittle	Physician Order	399247	02/15/2023	02/15/2023		02/15/2023	
White, Betty	Abdul Team	Ralph Doolittle	Attending Physician Certification of Terminal Illness	401490	02/13/2023	02/20/2023	02/20/2023	02/25/2023	
White, Betty	Abdul Team	Ralph Doolittle	Physician Order	401435	02/08/2023				
White, Betty	Abdul Team	Ralph Doolittle	Physician Order	401412	02/07/2023				
White, Betty	Abdul Team	Ralph Doolittle	Physician Order	401406	02/06/2023	02/20/2023	02/20/2023	02/29/2023	

PHYSICIAN ELECTRONIC SIGNATURES

Physicians and non-physician practitioners can electronically sign orders in Axxess Hospice if they are set up with permissions and a user profile.

To sign orders, navigate to the **Pending Signature** tab. Orders that are ready to be signed will have a **Sign** hyperlink under the Actions column. Select **Sign** to sign an order.



To sign multiple orders at once, select the blue **Bulk Sign** button. Select the orders to be signed and select the **Sign Selected** button to sign the selected orders.



Once signed, orders will appear on the **Completed Orders** tab.

NOTE: Practitioners will only be able to sign orders that are assigned to them.

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/>.

