

# **HOSPICE OVERVIEW TRAINING MANUAL**

May 2023

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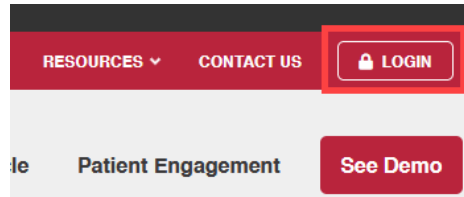
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## LOG INTO AXXESS

Navigate to [www.axxess.com](http://www.axxess.com). Select **LOGIN** at the top right of the page.



Input user credentials and select **Secure Login**.



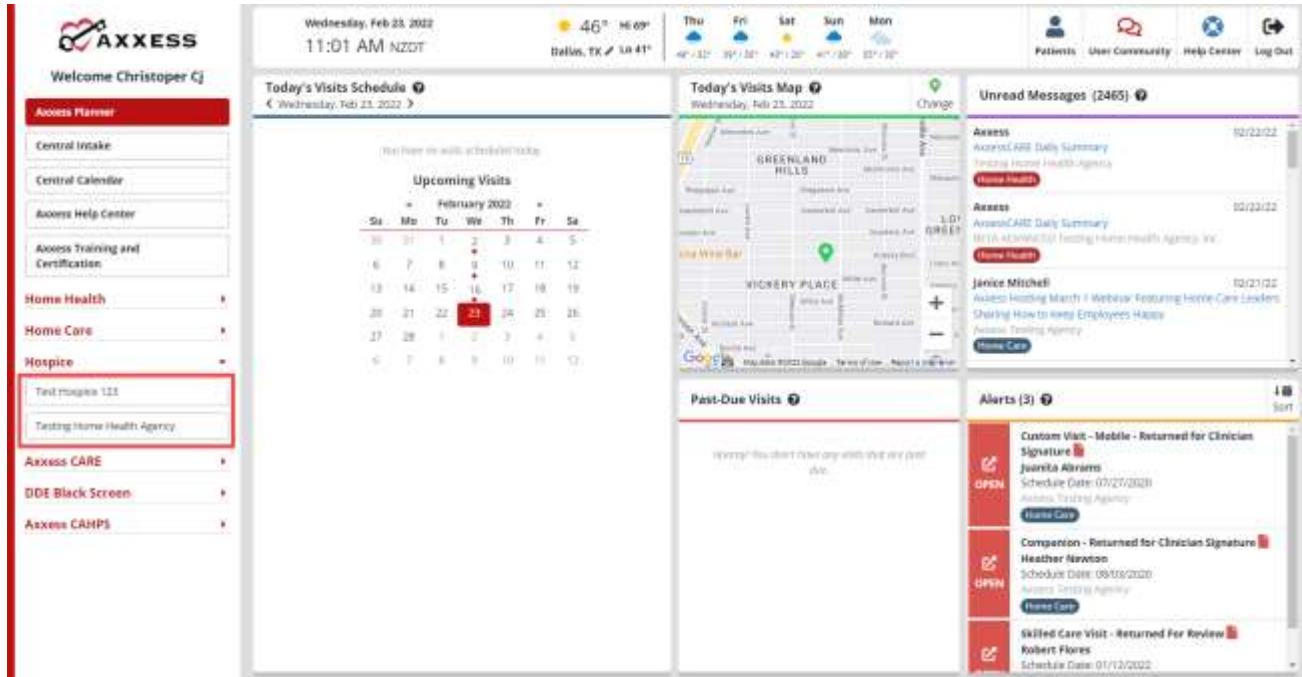
Confirmation appears that Login Successful, select the green **OK** button.



## AXXESS PLANNER

The Axxess Planner displays pertinent information specific to a user. Shortcuts have been placed on the left side of the page to allow for easy access to the Axxess applications the organization is using. Users can also see upcoming visits, past due visits, unread messages and a map of today's visits. To access patient charts,

document a visit or bill for an individual patient, select the appropriate Axxess application on the left side of the page.



Select **Axxess Planner** in the top right of the **Navigation** menu to go back to the planner.

**Navigation Menu** - Once logged in, the navigation menu at the top will allow for easy access to the data.

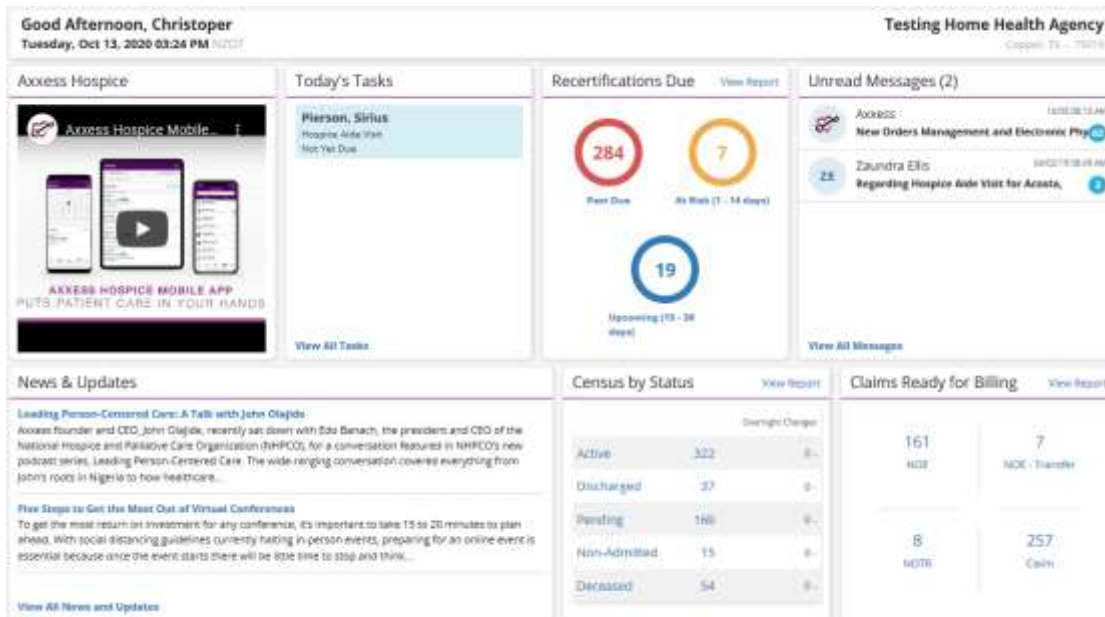


## HOME

The Home menu allows access to the following actions based on permissions granted to the user.



**My Dashboard** - Houses eight tiles that include the welcome panel, a branch filter, video, Today's Tasks, Recertifications Due, Unread Messages, News and Updates, Census by Status and Claims Ready for Billing.



**Pending Co-Signature** - Enables users to stay compliant with the state's Nurse Practice Act and adhere to internal organization policies. The process of co-signing documents can be individualized to meet users' specific needs and streamline organization operations.

Patient	Event Date	Task	Assigned To	Actions
<b>Patient: Abbott, Alexander</b>				
Abbott, Alexander (MRN: AA12272020) United States	03/30/2023	Skilled Nurse Visit <i>Submitted Pending Co-Signature</i>	Abdul MD Test	Co-Sign Return Quick View Message User
Abbott, Alexander (MRN: AA12272020) United States	03/30/2023	Hospice Aide Visit <i>Submitted Pending Co-Signature</i>	Abdul MD Test	Co-Sign Return Quick View Message User
Abbott, Alexander (MRN: AA12272020) United States	03/30/2023	Care Coordination Note <i>Submitted Pending Co-Signature</i>	Mary Camos	Co-Sign Return Quick View Message User
Abbott, Alexander (MRN: AA12272020) United States	03/22/2023	Healing Touch Visit <i>Submitted Pending Co-Signature</i>	Mary Camos	Co-Sign Return Quick View Message User
Abbott, Alexander (MRN: AA12272020) United States	03/16/2023	Care Coordination Note <i>Submitted Pending Co-Signature</i>	Mary Camos	Co-Sign Return Quick View Message User
<b>Patient: White, Betty</b>				
White, Betty (MRN: sst12162020)		Homemaker Visit		Co-Sign Return

**Quality Assurance (QA) Center** - The QA Center is where clinical documentation is processed by the QA staff. QA staff can view, approve and return documents from within the QA Center. Functionality is split between the **Tasks** and **Infection Reports** tabs.

Patient	Event Date	Task	Assigned To	Actions
<b>Patient: Abatha, Elizabeth</b>				
Abatha, Elizabeth (MRN: 0001015) United States	03/24/2023	Healing Touch Visit <i>Submitted with Signature</i>	Amanda Powell	Approve Return
<b>Patient: Abbott, Alexander</b>				
Abbott, Alexander (MRN: AA12272020) United States	03/21/2023	Physician Order <i>Submitted with Signature</i>	Gaurav Jangde	Approve Return
Abbott, Alexander (MRN: AA12272020) United States	03/21/2023	Physician Order <i>Submitted with Signature</i>	Gaurav Jangde	Approve Return
<b>Patient: Abellanosa, Carl Adriane</b>				
Abellanosa, Carl Adriane (MRN: ...)				

**QA Tasks by Status**

Returned: 0

Pending: 19

**Tasks by Discipline**

- 10 Skilled Nursing
- 4 Healing Touch
- 3 Order
- 2 Hospice Aide

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

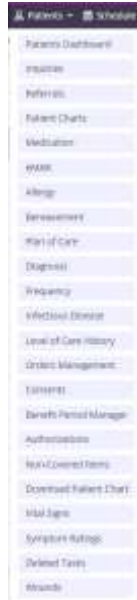
Pending Approval    Export Ready    Export History

Search by Patient Name:  12/16/2021 - 03/16/2022    Select H5 Export Type:     All Branches:    

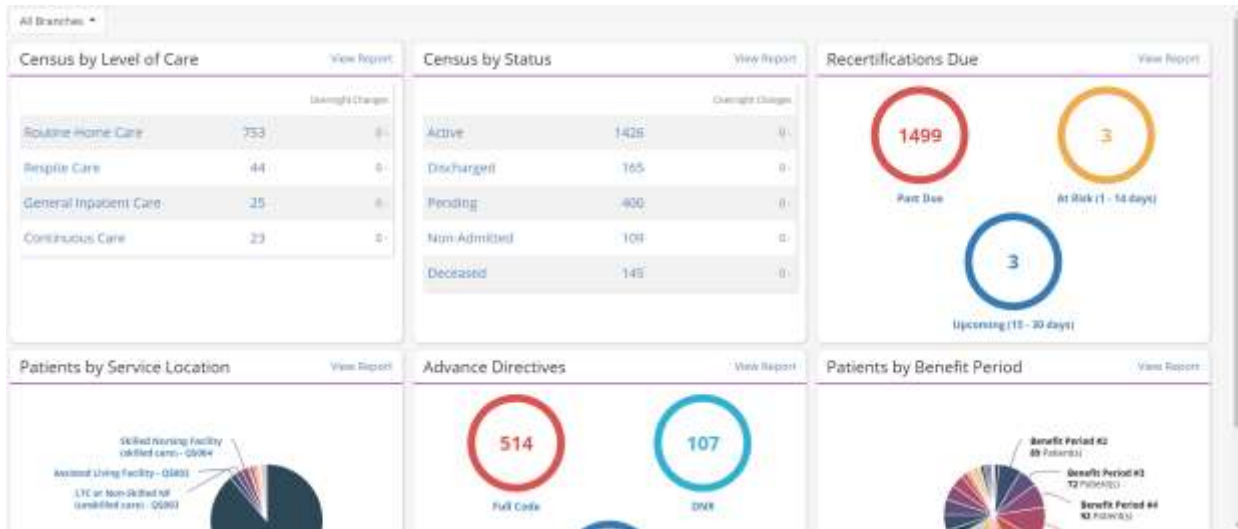
<input type="checkbox"/>	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Actions
<input type="checkbox"/>	48 days overdue	AKUHWA, Angelo	AccessRCM Test Payor	Admission <span>1 Error</span> <span>4 Inconsistencies</span>	01/13/2022	02/18/2022 07:16 AM	<input type="button" value="Check Errors"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	5 days	Albina, Jimmy	Medicare	Admission	03/07/2022	03/15/2022 07:14 AM	<input type="button" value="Approve"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	14 days overdue	Ang, Mary Beverly	AccessRCM Test Payor	Admission <span>4 Inconsistencies</span>	02/16/2022	03/05/2022 01:30 AM	<input type="button" value="Check Errors"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	49 days overdue	Anthony, Charles	AccessRCM Test Payor	Discharge <span>1 Inconsistency</span>	01/19/2022	02/12/2022 04:41 AM	<input type="button" value="Approve"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	14 days overdue	Ateriaga, Robo	AccessRCM Test Payor	Admission <span>4 Inconsistencies</span>	02/16/2022	02/17/2022 10:25 AM	<input type="button" value="Approve"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	26 days overdue	Arthi, Test	AccessRCM Test Payor	Discharge <span>1 Inconsistency</span>	02/11/2022	02/12/2022 04:17 AM	<input type="button" value="Approve"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	14 days overdue	Belasubramanian, Prbakaran	AccessRCM Test Payor	Admission <span>4 Inconsistencies</span>	02/16/2022	02/17/2022 10:04 AM	<input type="button" value="Approve"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	48 days overdue	Bates, Samantha	AccessRCM Test Payor	Admission <span>4 Inconsistencies</span>	01/13/2022	01/14/2022 09:39 AM	<input type="button" value="Approve"/> <input type="button" value="Edit"/>

## PATIENTS

The Patients menu allows access to the following actions based on permissions granted to the user.



**Patients Dashboard** - Shows six tiles that keep clinicians up to date on important information including, the Census by Level of Care, Census by Status, Recertifications Due, Patients by Service Location, Advanced Directives and Patients by Benefit Period.



**Inquiries** - See all patient inquiries (sales leads) with functionality to add, edit, delete, export and/or convert to referral.

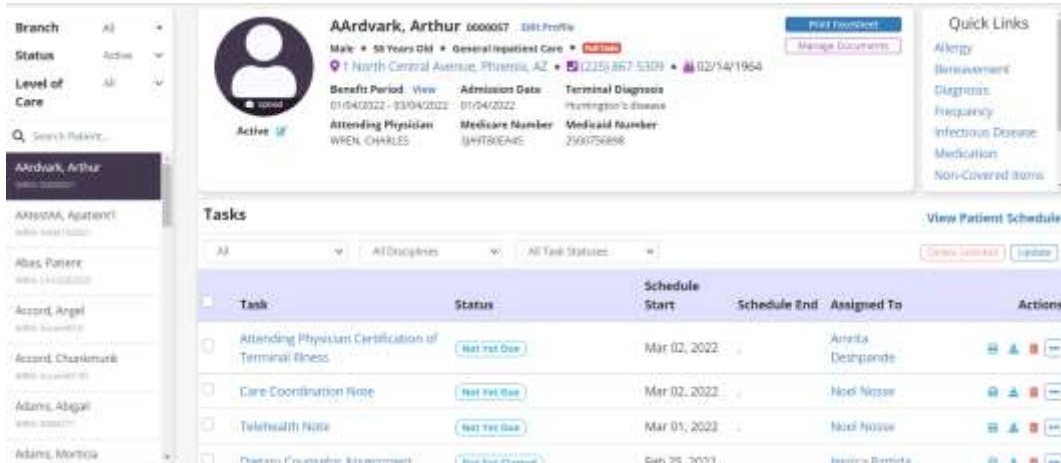
Inquiry Date	Patient Information	Contacts Information	Branch	Service Requested	Assigned Team Member	Follow-Up Date	Comment	Actions
02/24/2022	White, Paul (553) 535-5353		United States	Hospice	Not Available	Not Available	Not Available	Convert to Referral
02/24/2022	Pande, Sameer (343) 434-3234		United States	Hospice	Not Available	Not Available	Not Available	Convert to Referral
02/22/2022	Murray, Dejournee (214) 704-7935	Murray, Harriet	United States	Hospice	Person, Christopher	02/28/2022		Convert to Referral
02/14/2022	sharma, shresh (214) 575-7711		United States	Hospice	Not Available	Not Available	Not Available	Convert to Referral

**Referrals** - See all patient referrals with functionality to make notes, edits, export, non-admit, convert to pending and/or remove.

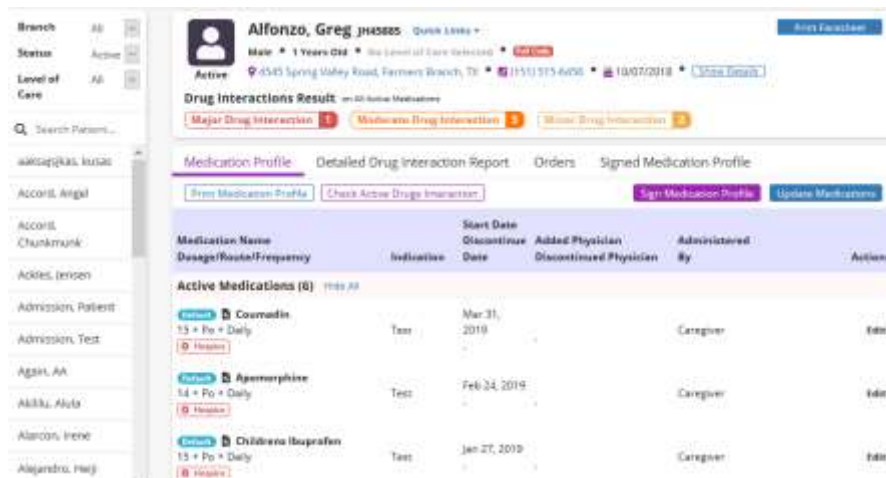
Referral Date	Patient Name	Branch	Line of Service	Referral Source	Date of Birth	Gender	Created By	Actions
02/16/2022	Doi, John	United States	Hospice	Physician	01/01/1960	Male	Jose Lopez	Notes, Convert to Pending, New Admit
02/16/2022	Golkwad, Sarika	United States	Hospice	Physician	02/06/1950	Female	Sarika Golkwad	Notes, Convert to Pending, New Admit
02/15/2022	Murajan, Bhushant	United States	Hospice	Physician	02/06/1998	Male	Bhushant Murajan	Notes, Convert to Pending, New Admit
02/15/2022	Riggins, Sara	United States	Hospice	Other	04/04/1970	Female	Sara Riggins	Notes, Convert to Pending, New Admit
02/15/2022	BHATHNAGAR, ANHAT	United States	Hospice	Physician	12/21/1940	Female	Anhat Bhatnagar	Notes, Convert to Pending, New Admit
02/14/2022	Noack, Izzy	United States	Hospice	Other	08/17/2006	Male	Hendi Noack	Notes, Convert to Pending, New Admit
02/13/2022	P LN test, P FN test	United States	Hospice	Physician	02/09/2022	Female	Sarika Golkwad	Notes, Convert to Pending, New Admit
02/07/2022	Resco, henrietta	United States	Hospice	Other	11/19/1954	Female	Parveta Henbott	Notes, Convert to Pending, New Admit
01/17/2022	gangawaram, lakshmi	United States	Hospice	Other	08/29/1950	Female	Jayalakshmi Gangawaram	Notes, Convert to Pending, New Admit
01/12/2022	Bisaj, Goodness	United States	Hospice	Other	03/05/1970	Female	Sarraj Bisaj	Notes, Convert to Pending, New Admit



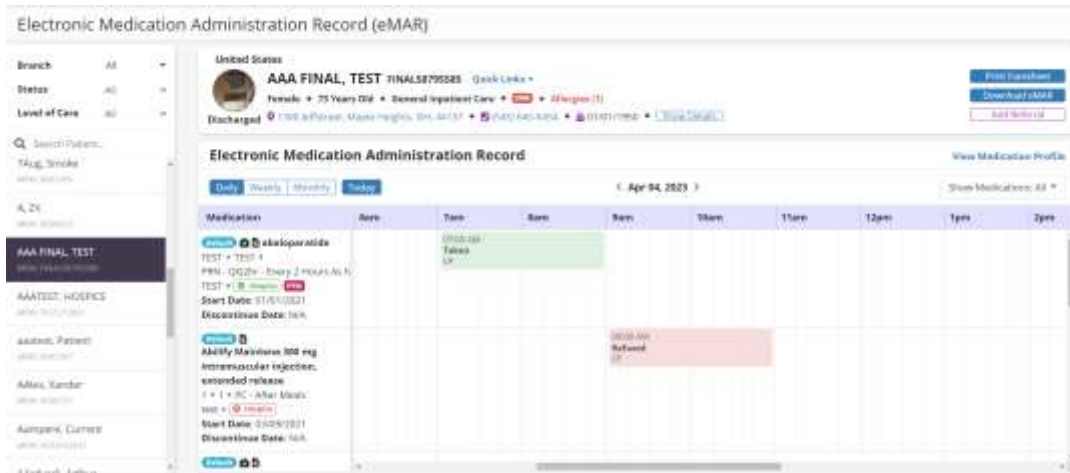
**Patient Charts** - See all patient charts with functionality to view information (including the schedule), make edits and quick links to other patient information.



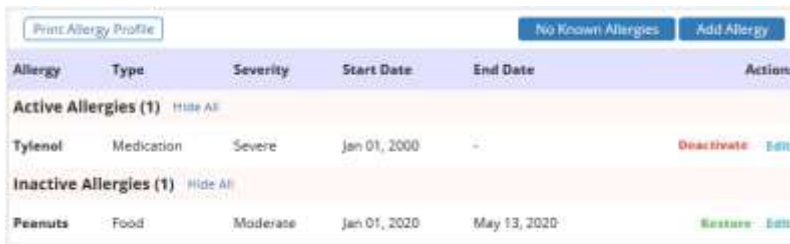
**Medication** - See all patients' Medication list with functionality to add, edit, discontinue, delete, print, sign, copy meds and view interactions. Functionality is split between the **Medication Profile**, **Detailed Drug Interaction Report**, **Orders** and **Signed Medication Profile** tabs.



**Electronic Medication Administration Record (eMAR)** - See the list of the patient's active medications and filters with the ability to add medication actions and download the eMAR (permissions based).



**Allergy** - See active and inactive allergy lists with functionality to add, edit, deactivate, restore and print allergies.



**Bereavement** - Bereavement Plan of Care enables users to document goals, interventions and services related to bereavement before and after a patient’s death. Functionality is split between the **Bereavement Plan of Care** and **History** tabs



**Plan of Care** - See all patient’s Plan of Care with functionality to view historic, update, add or remove problem statements, interventions and goals. Functionality is split between the **Comprehensive Plan of Care**, **Problems Statements** and **History** tabs.

Comprehensive Plan Of Care    Problem Statements    History    [Print](#)    [Download](#)

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**Patient Information**

<b>First Name</b>	<b>MI</b>	<b>Last Name</b>	<b>Suffix</b>	<b>Date of Birth</b>	<b>Gender</b>	<b>MRN</b>
Angel	h	Accord		08/15/1960	Female	Accord010
<b>Address Line 1</b>	<b>Address Line 2</b>		<b>City</b>	<b>State</b>	<b>ZIP</b>	<b>Medicare Number</b>
16000 Dallas Pkwy			Dallas	TX	752486607	321654987A
<b>Medicare Beneficiary Identification</b>	<b>Location</b>		<b>PhoneNumber</b>			
56985478965	Home - Q5001		Home: (214) 575-7711			
<b>Legal Representative</b>		<b>Attending Physician</b>				
		JONES , ZAUNDRA NPI: 1902803224 4591 SOCASTEE BLVD MYRTLE BEACH, SC 295887209 (843) 497-5929 (Office), (843) 293-1115 (Fax)				
<b>Admission Date</b>	<b>Level of Care</b>		<b>Benefit Period Start Date</b>		<b>Benefit Period End Date</b>	
11/13/2019			05/11/2020		07/09/2020	

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**Provider Information**

<b>Provider Name</b>	<b>Provider NPI</b>	<b>Address Line 1</b>	<b>Address Line 2</b>	<b>City</b>
Testing Home Health Agency, Inc	1234567899	Dallas Parkway 16000	1717 E Belt Line Road	Coppell
<b>State</b>	<b>ZIP</b>			
TX	75019			

**Diagnosis** - View, edit, print and/or download when diagnoses have been added, updated or removed.

Saved By	Date	Actions
Matthew Abbott	09/22/2020	Action In Progress

ICD-10 Code	Description	Related	Start Date	Resolved Date	Actions
I67.1	Cerebral aneurysm, nonruptured		04/01/2020	Current	<a href="#">View</a>
I30.0	Acute nonspecific idiopathic pericarditis	Yes	02/01/2020	Current	<a href="#">View</a>
G30.1	Alzheimer's disease with late onset	Yes	01/01/2020	Current	<a href="#">View</a>
I10	Essential (primary) hypertension	Yes	09/22/2020	Current	<a href="#">View</a>

[Cancel](#)

Jean Santos	04/01/2020	<a href="#">View Details</a>
Jean Santos	04/01/2020	<a href="#">View Details</a>
Saikrishna Vinnakota	02/20/2020	<a href="#">View Details</a>

**Frequency** - View active, inactive and discontinued frequencies from all benefit periods for all disciplines. There is also functionality to update and print frequencies.

Discipline	Visit Frequency	PRN	Start Date	End Date	Scheduled Visits	Available Visits	Actions
<b>Active Frequencies (4)</b> <small>Hide All</small>							
Dietary Counselor	2w1	No	Jun 15, 2020	Jun 27, 2020	0	4	
Medical Social Worker	1w1	No	Jun 15, 2020	Jun 20, 2020	0	1	
Skilled Nurse	1w2	No	Jun 15, 2020	Jun 27, 2020	1	1	<a href="#">View Scheduled Tasks</a>
Skilled Nurse	1	Yes	Jul 25, 2020	Jul 26, 2020	0	1	
<b>Discontinued Frequencies (1)</b> <small>Hide All</small>							
Skilled Nurse	2w2	No	Jun 15, 2020	Jun 27, 2020	0	0	

**Infectious Disease** - Add and view COVID-19 screenings.

Entered By	Type of Screening	Person Screened	Name	Screening Date	Screening Results	Risk Level	Actions
Christopher Cj	COVID-19	Patient	Accord, Angel	10/15/2020	Yes- 1/4 questions	Low	<a href="#">View</a>
Jordyn Waugh	COVID-19	Patient	Accord Angel	04/02/2020	Yes- 0/4 questions	High	<a href="#">View</a>
Matthew Abbott	COVID-19	Patient	Accord Angel	03/30/2020	Yes- 1/4 questions	Low	<a href="#">View</a>
Joan Zachariah	COVID-19	Patient	Accord Angel	03/27/2020	Yes- 2/4 questions	Low	<a href="#">View</a>
Charishma Damuluti	COVID-19	Patient	Accord Angel	03/24/2020	Yes- 1/4 questions	Low	<a href="#">View</a>

1 of 5 total results      Show 10 entries

**Level of Care History** - Displays the patient's admission date, discharge date and admission type. Select **View Details** under Actions to view the patient's level of care history.

Admission Date	Discharge Date	Type	Actions
06/05/2022	09/06/2022	New Admission	<a href="#">View Detail In Progress</a>

Level Of Care	Start Date	End Date
Routine Home Care	07/28/2022	09/06/2022
Respite Care	07/20/2022	07/27/2022
Routine Home Care	06/29/2022	07/19/2022

[Close](#)

**Orders Management** - Orders are split into three sections: **To Be Sent** for orders ready to be sent for signature; **Pending Signature** for orders that were sent for signature and are expected back; **Completed Orders** to view and track completed orders.

To Be Sent   Pending Signature   Completed Orders

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

Mark as Signed as Sent

Age of Order	Patient	Team	Physician	Delivery Method	Type	Order Date	Date Approved	Order Preview	Actions
1 days	Clyde, Amanda	Access Academy	Ralph Goodittle	Not Available	Physician Order	02/17/2022	02/17/2022	Update Delivery Method	Mark as Sent
1 days	Agar, Cheong	Team Stars	ORVAL LOOHE	Not Available	Physician Order	02/17/2022	02/17/2022	Update Delivery Method	Mark as Sent
2 days	Avivbar, Arthur	ABC Team	Jose Lopez	Mail	Physician Order	02/16/2022	02/16/2022	Update Delivery Method	Mark as Sent
2 days	Larson, Bart	Access Academy	Ralph Goodittle	Not Available	Initial Plan of Care	02/15/2022	02/16/2022	Update Delivery Method	Mark as Sent
2 days	Rose, Carl Amphibert	Access Team	Ralph Goodittle	Not Available	Physician Order	02/16/2022	02/16/2022	Update Delivery Method	Mark as Sent
2 days	Rose, Carl Amphibert	Access Team	Ralph Goodittle	Not Available	Physician Order	02/14/2022	02/16/2022	Update Delivery Method	Mark as Sent

**Consents** - Upload, manage and track electronic consent forms and other important documents that the patient/caregiver must sign before starting hospice care.

✔ Signed   
 ⚠ Not Signed   
 ✖ Refused

Admission Date	Document Type	Date Signed	Status	Actions
10/28/2020	Consents	02/25/2022	✔	⬇️ ⬆️ ⬇️ ⬇️
10/28/2020	Advance Directives	Not Available	⚠	Mark as Signed   Refused to Sign   ⬇️
Not Available	Hospice Physician Certification of Terminal Illness	Not Available	⚠	Mark as Signed   Refused to Sign   ⬇️
Not Available	Face-to-Face	Not Available	⚠	Mark as Signed   Refused to Sign   ⬇️
Not Available	Advance Directives	Not Available	⚠	Mark as Signed   Refused to Sign   ⬇️
10/28/2020	Hospice Election Statement	07/22/2021	✖	⬇️ ⬆️ ⬇️ ⬇️

**Benefit Period Manager** - Update and correct the benefit period information when corrections or adjustments are needed.

Admission Date	Discharge Date	Associated Benefit Periods	Type	Actions
10/28/2020 <small>Current Admission Period</small>	Current	8	New Admission	<a href="#">View Detail In Progress</a>

Benefit Period Number	Benefit Period Start Date	Benefit Period End Date	Reporting	Actions
8 <small>Current Benefit Period</small>	02/20/2022	04/20/2022	<span style="color: green;">✔</span>	No Actions
7	12/22/2021	02/19/2022		<a href="#">Use for Recertification Reporting</a>
6	10/23/2021	12/21/2021		<a href="#">Use for Recertification Reporting</a>
5	08/24/2021	10/22/2021		<a href="#">Use for Recertification Reporting</a>
4	06/25/2021	08/23/2021		<a href="#">Use for Recertification Reporting</a>
3	04/26/2021	06/24/2021		<a href="#">Use for Recertification Reporting</a>
2	01/26/2021	04/25/2021		<a href="#">Use for Recertification Reporting</a>
1	10/28/2020	01/25/2021		<a href="#">Edit</a> <a href="#">Use for Recertification Reporting</a>

[Cancel](#)

**Authorizations** - Identify payers that require authorization and track authorizations seamlessly.

Payers: All [Add Authorization](#)

Authorization Number	Insurance	Authorization Type	Start Date	End Date	Status	Actions
123654987	Tricare Mango	Date Range + Authorized Units	03/01/2022	03/31/2022	Active	<a href="#">Edit</a> <a href="#">View Service</a> <a href="#">Delete</a>
ZE02282022	Tricare Mango	Date Range + Authorized Units	02/01/2022	02/28/2022	Active	<a href="#">Edit</a> <a href="#">View Service</a> <a href="#">Delete</a>

1 | 2 total results Show 10 entries

**Non-Covered Items** - Document notification of a patient's or caregiver's request for an addendum to the election statement by generate addendum, mark as signed, refused to sign, edit, print, download or remove.

✔ Mark as Signed 
 ⚠ Not Signed 
 ✖ Refused to Sign 
 [Generate Addendum](#)

Requested Date	Requested By	Name	Addendum Status	Signature Status	Signature Date	Actions
11/06/2020	Patient	Abas, Patient	Created	<span style="color: orange;">⚠</span> Not Available		<a href="#">Print</a> <a href="#">Download</a> <a href="#">Delete</a>
09/28/2021	Patient	Abas, Patient	Furnished	<span style="color: orange;">⚠</span> Not Available		<a href="#">Mark as Signed</a> <a href="#">Refused to Sign</a> <a href="#">Print</a> <a href="#">Download</a>
02/25/2022	Patient	Abas, Patient	Created	<span style="color: orange;">⚠</span> Not Available		<a href="#">Print</a> <a href="#">Download</a> <a href="#">Delete</a>

1 | 3 total results Show 5 entries

**Download Patient Chart** - Download and print multiple documents at once or the entire patient chart.



The screenshot shows a search interface for requesting documents. It includes filters for Branch, Patient Status, Patient (with a search box), Search By (Benefit Period, Date Range), Document Status, and Categories. A 'Request Documents' button is located below the filters. Below the filters is a table with the following data:

Requested On	Requested By	Status	Branch	Date Range	Patient	Actions
01/12/2022	Buffington, Crystal	Exported	United States	12/01/2021 - 01/31/2022	Buffington, Lilo	Export
01/12/2022	Sin, Charmaine	Exported	United States	-	Mendes, Amanda	Export
01/12/2022	Sin, Charmaine	Exported	United States	-	Mendes, Amanda	Export

**Vital Signs** - View vital sign logs that enable clinicians to monitor patient status and provide helpful insights into eligibility and treatment decisions. Functionality is split between the **Vital Signs** and **Additional Measurements** tabs.



The screenshot shows the 'Vital Signs' tab with a date range filter set to 11/26/2021 - 02/24/2022. The table below displays the following data:

Date	Entered By	Task	Pulse	Blood Pressure (mmHg)	Temperature	Respirations (/min)	O2 Saturation (%)	Actions
02/15/2022	Partida, Jessica	Skilled Nurse Visit	76 Apical Sitting	173/85 Sitting (L)	98 °F Oral	10	15 On Oxygen	No Actions
02/07/2022	Partida, Jessica	Skilled Nurse Visit	58 Apical Standing	186/80 Lying (R)	96 °F Temporal	10	10 On Room Air	No Actions
01/26/2022	Partida, Jessica	Skilled Nurse Visit	68 Apical Lying	173/85 Lying (L)	89 °F Temporal	10	15 On Oxygen	No Actions

At the bottom, it shows '1' of '3 total results' and a 'Show 50 entries' button.

**Symptom Ratings** - View symptom rating logs that enable clinicians to monitor patient status and provide helpful insights into eligibility and treatment decisions.



The screenshot shows the 'Symptom Ratings' tab with a date range filter set to 11/26/2021 - 02/24/2022. The table below displays the following data:

Date	Entered By	Task	Sleep										Actions
			Pain	Anxiety	Appetite	Constipation	Depression	Dizziness	Dyspnea	Nausea	Pattern	Vomiting	
02/07/2022	Partida, Jessica	Skilled Nurse Telehealth Note	2	2	0	2	0	0	2	3	1	1	No Actions

At the bottom, it shows '1' of '1 total results' and a 'Show 30 entries' button.

**Deleted Tasks** - Users can restore tasks that have been deleted from a patient's chart in error (permissions based). Once the desired task is found, select **Restore** under Actions to restore the task back to its original status.

Task *	Scheduled Date	Scheduled To	Status	Deleted Date	Deleted By	Actions
RN Initial/Comprehensive Assessment	10/13/2022	Jhonamie Gungob, RN	Not Yet Due	10/13/2022	Jhonamie Gungob, RN	Restore
Skilled Nurse PRN Visit	12/29/2022	Jhonamie Gungob, RN	Returned for Review	12/30/2022	Jhonamie Gungob, RN	Restore

Search by Task Name...

1 | 2 total results | Show 25 entries

**Wounds** - Lists all active and inactive wounds for date range indicated. From here, you can view pertinent wound data per wound documented such as the wound name, location, onset date, type and measurements.

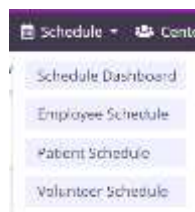
Date	Entered By	Task	Wound Name	Location	Onset Date	Wound Type	Length	Width	Depth	Resolved Date	Actions
01/26/2023	Cohodes, Carla	Skilled Nurse Visit	secrum	not available	01/26/2023	Pressure Injury	2	2	2	not available	No Actions

Date Range: 01/05/2023 - 04/05/2023 | Export

1 | 1 total results | Show 5 entries

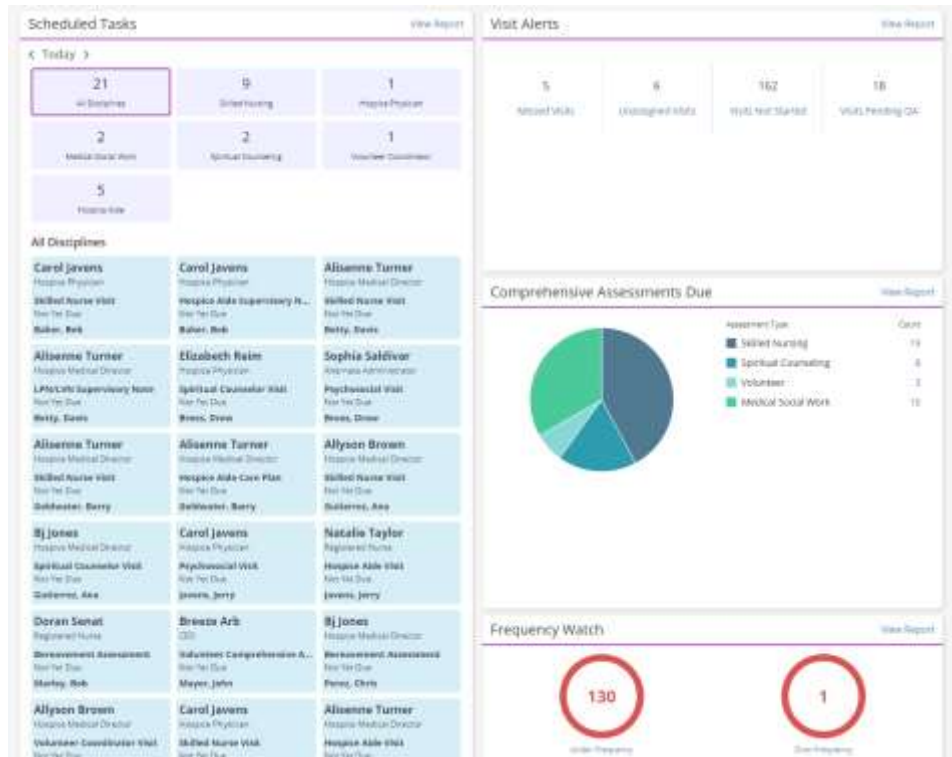
## SCHEDULE

The **Schedule** menu allows access to the following actions based on permissions granted to the user. NOTE: See Intake/Scheduling manual for further details.

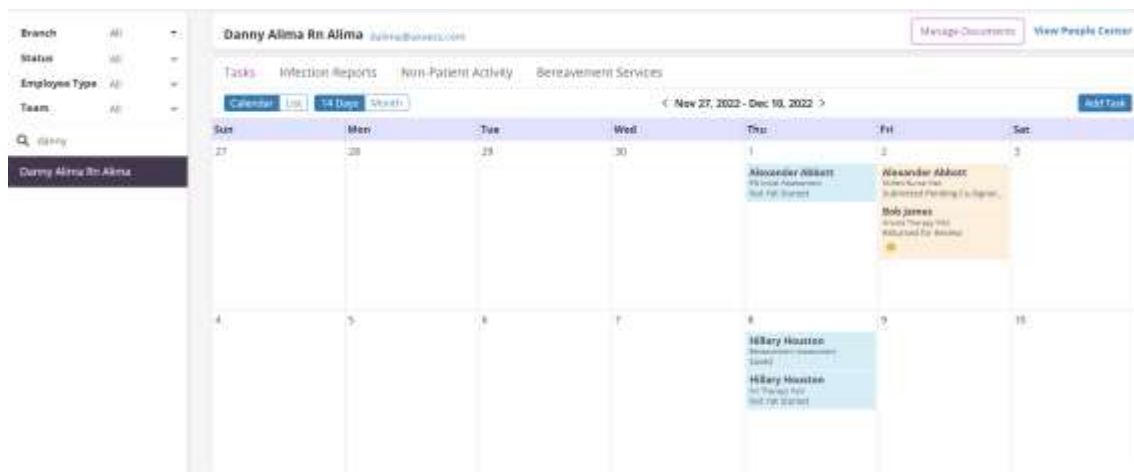


**Schedule Dashboard** - Provides real-time data for scheduled tasks, patient frequencies and visit activity, with actionable widgets that enable users to open filtered and full schedule reports and navigate directly to scheduled tasks (permissions based).

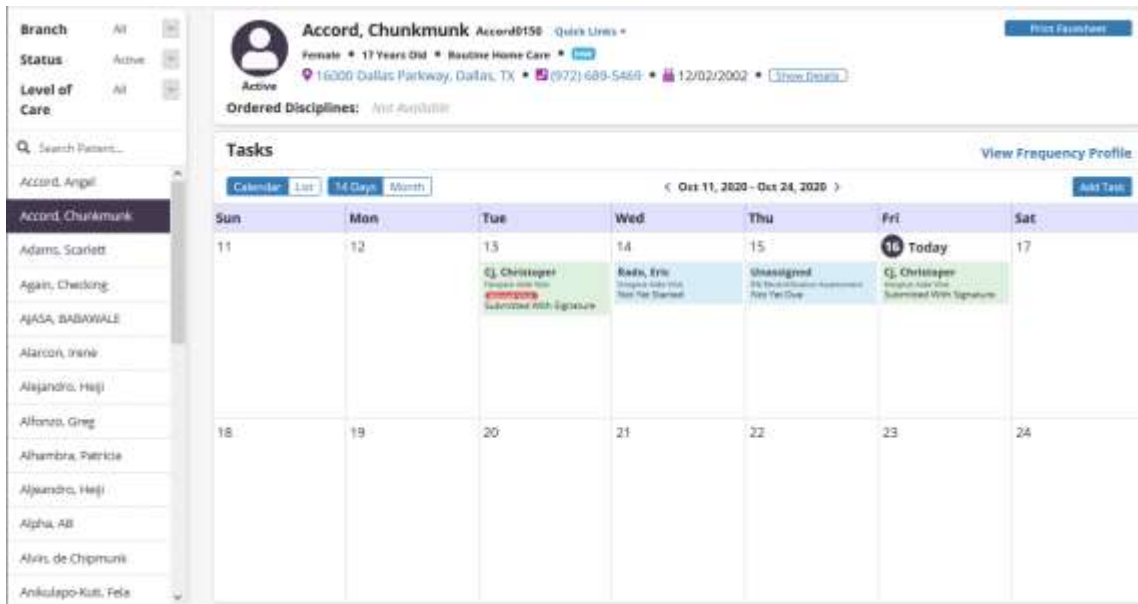




**Employee Schedule** - See all employee schedules with the same functionality as the Patient Schedule. Manage employee documents and see **Infection Reports**. See **Bereavement Services** and add **Non-Patient Activity**.



**Patient Schedule** - See all patients schedules with functionality to view, add tasks and drag and drop visits. The default view is 14-day periods in a calendar view but can also be viewed monthly, by list or benefit period.



**Branch:** All  
**Status:** Active  
**Level of Care:** All

**Search Patient:** Accord, Angel  
**Accord, Chunkmunk**  
 Adams, Scarlett  
 Again, Choking  
 AJASA, BABAWALE  
 Alarcon, Inani  
 Alejandro, Heji  
 Alfonso, Greg  
 Alhambra, Patricia  
 Alejandro, Heji  
 Alpha, AB  
 Alexis de Chipmunk  
 Anikulapo-Kuti, Fela

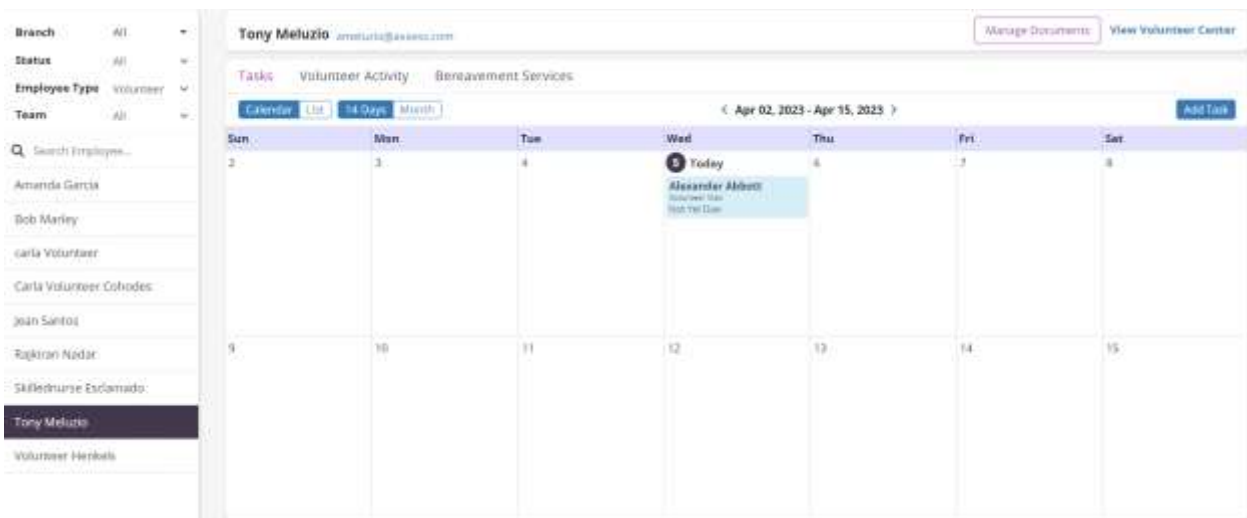
**Accord, Chunkmunk** Accord0158 Quick Links  
 Female • 17 Years Old • Baseline Home Care  
 Active 16300 Dallas Parkway, Dallas, TX • (972) 689-5454 • 12/02/2002

**Ordered Disciplines:** Not Available

**Tasks** View Frequency Profile  
 Calendar: List 14 Days Month  
 < Oct 11, 2020 - Oct 24, 2020 > Add Task

Sun	Mon	Tue	Wed	Thu	Fri	Sat
11	12	13 QJ Christopher Eric Bede Substance Abuse Signature	14 Bede, Eric Substance Abuse Substance Abuse Signature	15 Unassigned 25 Therapist Assessment File Not Over	16 Today QJ Christopher Substance Abuse Substance Abuse Signature	17
18	19	20	21	22	23	24

**Volunteer Schedule** - See all employees schedules that have the employee type of volunteer with the same functionality as the Employee Schedule. Manage employee documents and see **Volunteer Activity** and **Bereavement Services**.



**Branch:** All  
**Status:** All  
**Employee Type:** Volunteer  
**Team:** All

**Search Employee:** Amanda Garcia  
 Bob Marley  
 Carla Volunteer  
 Carla Volunteer Colindale  
 Joan Santos  
 Rajkiran Nadar  
 Skillednurse Escamado  
**Tony Meluzio**  
 Volunteer Heriberto

**Tony Meluzio** tonymeluzio@axxess.com Manage Documents View Volunteer Center

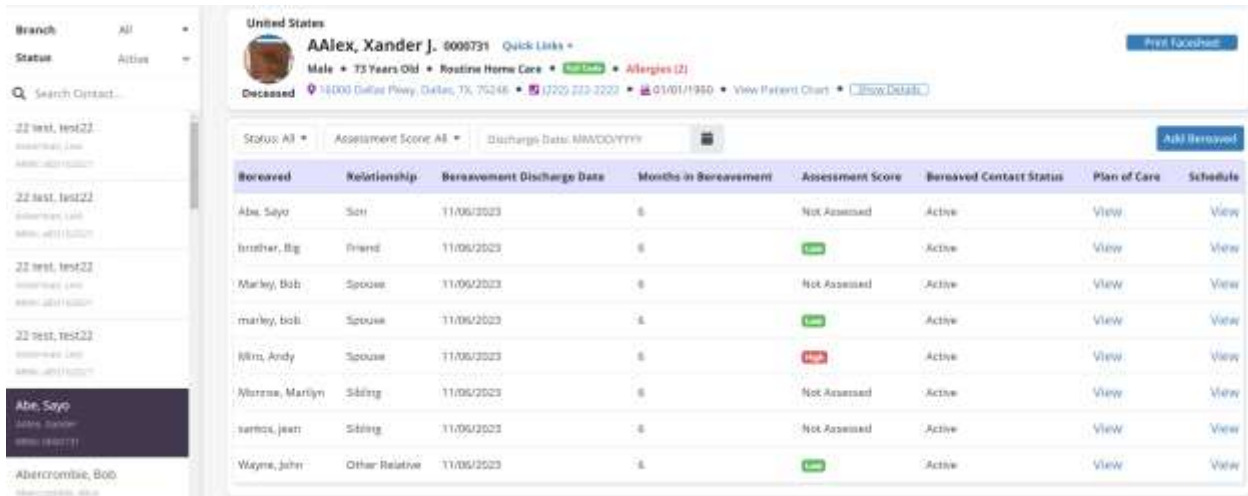
**Tasks** Volunteer Activity Bereavement Services  
 Calendar: List 14 Days Month  
 < Apr 02, 2023 - Apr 15, 2023 > Add Task

Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	3	4	5 Today Alexander Abbott Volunteer Task Task Not Over	6	7	8
9	10	11	12	13	14	15

## CENTERS

### Bereavement Center

Enables users to manage all bereavement activities, tasks and contacts in one convenient location (permissions based).

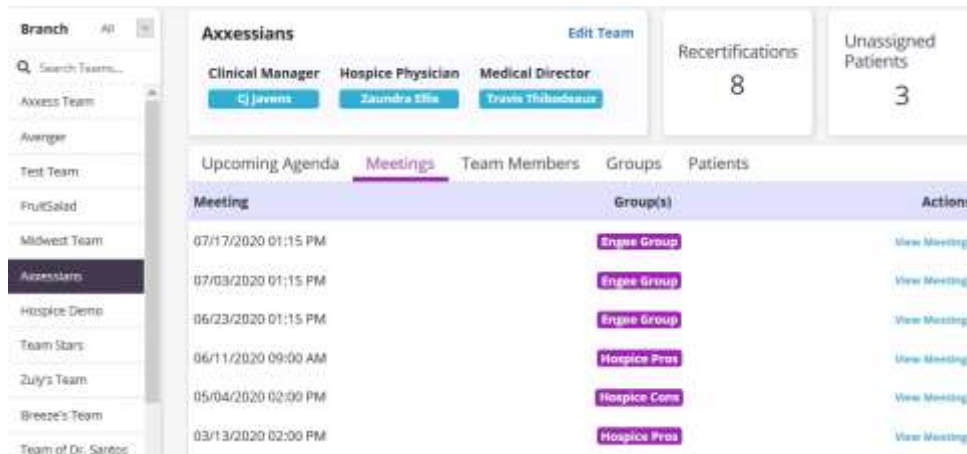


United States  
**Alex, Xander J.** 0008731 Quick Links + Print Record  
 Male • 73 Years Old • Routine Home Care • Medicare • Allergies (2)  
 Deceased • 1000 Dallas Pkwy, Dallas, TX 75248 • (214) 222-2222 • 01/01/1950 • View Patient Chart • Show Details

Status: All • Assessment Score: All • Discharge Date: MM/DD/YYYY Add Bereaved

Bereaved	Relationship	Bereavement Discharge Date	Months in Bereavement	Assessment Score	Bereaved Contact Status	Plan of Care	Schedule
Abe, Sayo	Son	11/09/2023	0	Not Assessed	Active	View	View
brother, Big	Friend	11/09/2023	0	<span>Low</span>	Active	View	View
Marley, Bob	Spouse	11/09/2023	0	Not Assessed	Active	View	View
marley, bob	Spouse	11/09/2023	0	<span>Low</span>	Active	View	View
Wim, Andy	Spouse	11/09/2023	0	<span>High</span>	Active	View	View
Wrenna, Marilyn	Sibling	11/09/2023	0	Not Assessed	Active	View	View
santos, jean	Sibling	11/09/2023	0	Not Assessed	Active	View	View
Wayne, John	Other Relative	11/09/2023	0	<span>Low</span>	Active	View	View

**Interdisciplinary Group (IDG) Center** - Gives users complete control over IDG meeting processes. All information is accessible/consolidated in a central location for easy management of all IDG-related tasks.



Branch: All | Search Teams... | Access Team | Average | Test Team | FruitSalad | Midwest Team | **Axxessians** | Hospice Demo | Team Stars | Zuly's Team | Breeze's Team | Team of Dr. Santos

**Axxessians** Edit Team

Clinical Manager: CJ Javens | Hospice Physician: Zaundra Elia | Medical Director: Travis Thibodeaux

Recertifications: 8 | Unassigned Patients: 3

Upcoming Agenda | **Meetings** | Team Members | Groups | Patients

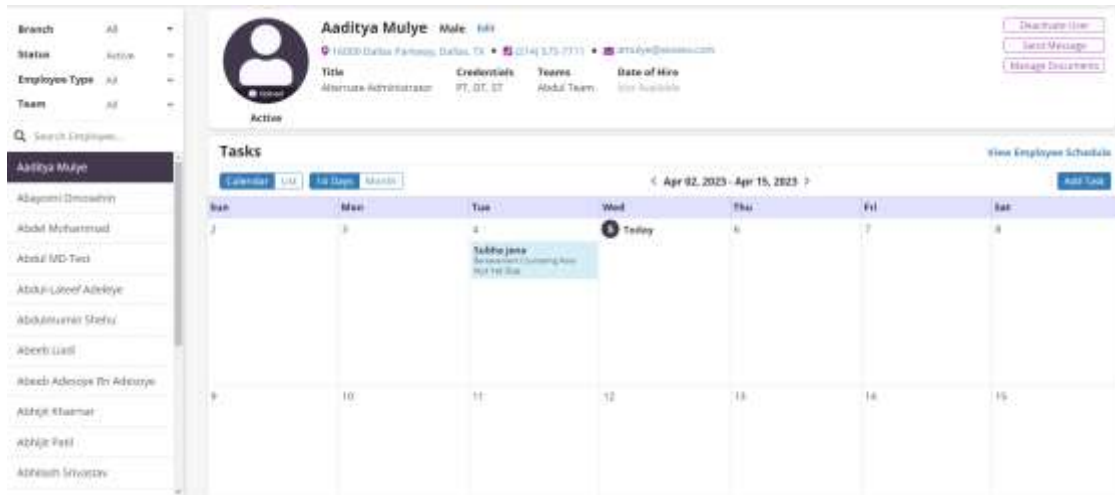
Meeting	Group(s)	Actions
07/17/2020 01:15 PM	<span>Engle Group</span>	<a href="#">View Meeting</a>
07/03/2020 01:15 PM	<span>Engle Group</span>	<a href="#">View Meeting</a>
06/23/2020 01:15 PM	<span>Engle Group</span>	<a href="#">View Meeting</a>
06/11/2020 09:00 AM	<span>Hospice Pres</span>	<a href="#">View Meeting</a>
05/04/2020 02:00 PM	<span>Hospice Com</span>	<a href="#">View Meeting</a>
03/13/2020 02:00 PM	<span>Hospice Pres</span>	<a href="#">View Meeting</a>

**PEOPLE**

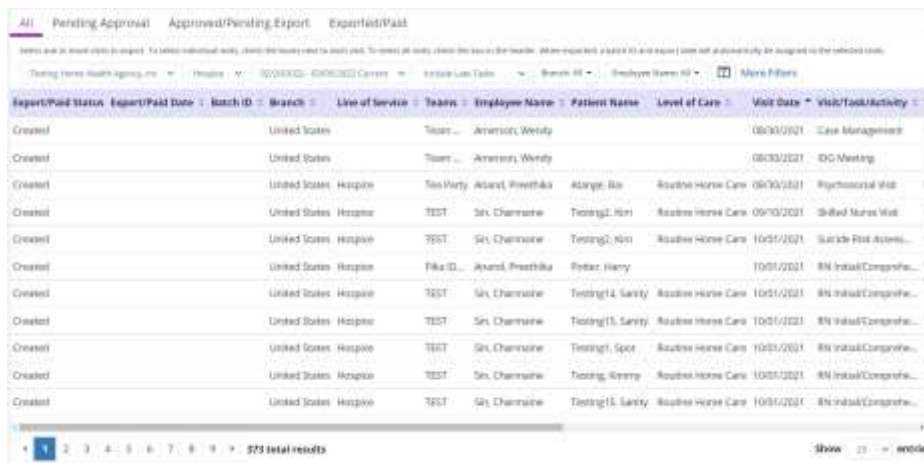
The **People** menu allows access to the People Center based on permissions granted to the user.



**People Center** - See all employee files with functionality to view information (including the schedule), edit their profile, add tasks, manage documents, reassign visits and links to send messages and employee schedules.



**Payroll Center** - Generate payroll export files with the data elements and formatting required by the organization’s payroll vendor. Functionality is split between the **All**, **Pending Approval**, **Approved/Pending Export** and **Exported/Paid** tabs.



**Volunteer Center** – Using the Volunteer Center is an easy way to track and monitor volunteers and their scheduled tasks. Functionality is similar to the calendars seen above.



The screenshot shows a user profile for Jean Santos, Female, with a profile picture and contact information. Below the profile is a 'Tasks' calendar view for the week of April 2, 2023, to April 15, 2023. The calendar shows a task for Alexander Abbott on Wednesday, April 5, 2023. The left sidebar contains a list of employees, with Jean Santos selected.

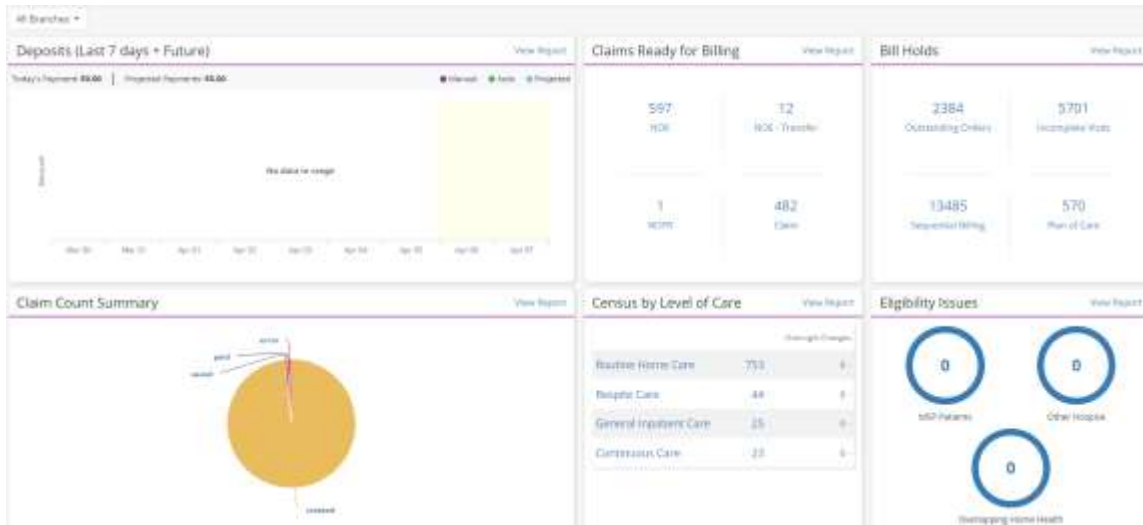
## **BILLING**

The Billing menu allows access to the following actions based on permissions granted to the user. NOTE: See Billing manual for further details.

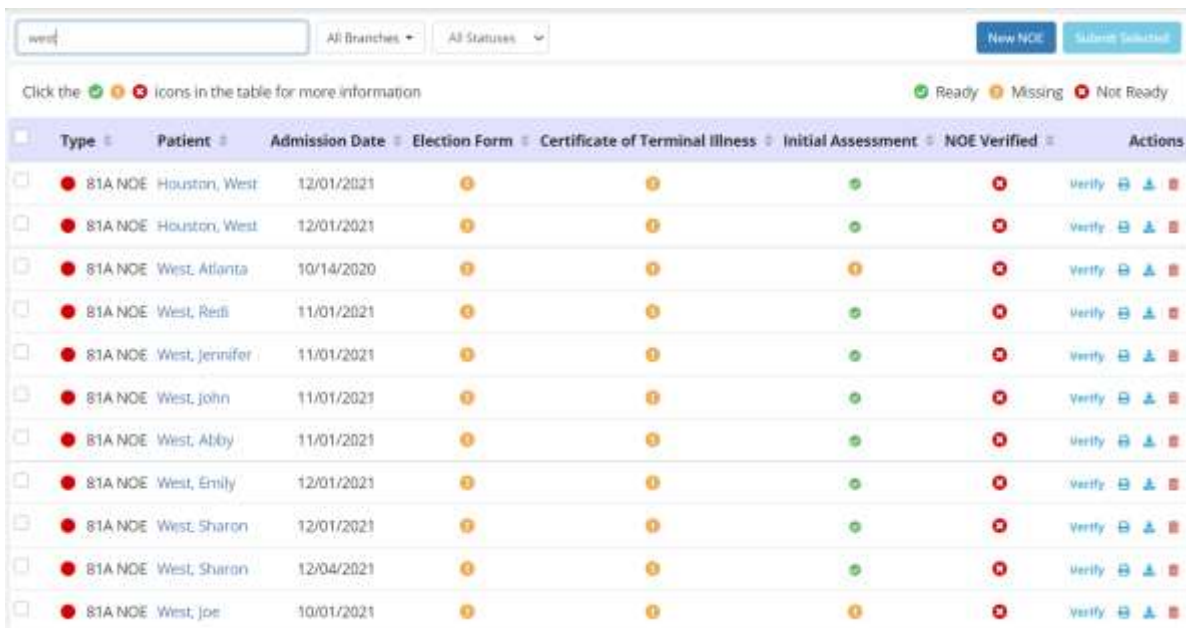


The screenshot shows a dropdown menu for the 'Billing' section. The menu items are: Billing Dashboard, Notice of Election (NOE), Notice of Termination/Revocation (NOTR), Claims, Remittance Advice, Collections, and Claims History.

**Billing Dashboard** - Displays six panels that are important in the day-to-day activity of a biller including Deposits (Last seven days + Future), Claims Ready for Billing, Bill Holds, Claim Count Summary, Census by Level of Care and Eligibility Issues. Select the **View Report** hyperlinks to see the full reports.



**Notice of Election (NOE)** - Check the status, verify, print, download, submit, delete (individually or in bulk) and create new NOE's.



The interface includes a search bar, filters for 'All Branches' and 'All Statuses', and buttons for 'New NOE' and 'Submit/Submitted'. A legend indicates status icons: green for Ready, yellow for Missing, and red for Not Ready.

Type	Patient	Admission Date	Election Form	Certificate of Terminal Illness	Initial Assessment	NOE Verified	Actions
81A NOE	Houston, West	12/01/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	Houston, West	12/01/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	West, Atlanta	10/14/2020	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	West, Reffi	11/01/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	West, Jennifer	11/01/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	West, John	11/01/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	West, Abby	11/01/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	West, Emily	12/01/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	West, Sharon	12/01/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	West, Sharon	12/04/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete
81A NOE	West, Joe	10/01/2021	Missing	Missing	Ready	Not Ready	Verify, Print, Download, Delete

**Notice of Termination/Revocation (NOTR)** - Check the status, verify, print, follow up, download, submit, delete (individually or in bulk) and create new NOTR's.

Search by Patient Name:  All Branches: ▼ All Statuses: ▼ New NOTR Submit Selected

Click the 🟢 🟡 🔴 icons in the table for more information 🟢 Ready 🟡 Missing 🔴 Not Ready

Type	Patient	Revocation / Discharge Date	Discharge Visit	Revocation Statement	NOTR Verified	Actions
81B NOTR	EEFeb, SmokeTest	02/22/2023	🟢	🟡	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	aaaSam, amSam	10/04/2022	🟡	🟡	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	aaaSam, aaaSam	11/29/2022	🟡	🟡	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	Albort, Alexander	03/02/2023	🟡	🟡	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	Abercrombie, Alice	05/18/2022	🟡	🟡	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	Adams, Abigail	05/25/2022	🟡	🟡	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	Adams, Abigail	05/24/2022	🟡	🟡	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	Adeokunbi, Lagbaja	07/01/2022	🟢	🟢	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	AUTO-HCS, PatientID1622203512	10/05/2022	🟢	🟡	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	Blessing, Nkiru	11/16/2022	🟢	🟡	🔴	Verify 📄 ⬆️ ⬇️
81B NOTR	Buttington, Snuffy	05/12/2022	🟡	🟡	🔴	Verify 📄 ⬆️ ⬇️

**Claims** - Search, create, delete, verify and submit claims. Also check the status, verify, follow up, download and print claims.

West  All Branches: ▼ All Statuses: ▼ Payers: All ▼ New Claim Submit Selected Delete Selected

Hover on 🟢 🟡 🔴 icons in the table for more information 🟢 Ready 🟡 Missing 🔴 Not Ready

Type	Patient	Claim Date Range	Expected	Prior Claim Status	Visits Completed	Orders Completed	Claim Verified	Actions
812 1st Claim <span>1 Error</span>	West, Redi	11/01/2021 - 11/30/2021	\$5,980.78	Created	🟢	🟢	🔴	Verify 📄 ⬆️ ⬇️
812 1st Claim <span>1 Error</span>	West, Abby	11/01/2021 - 11/30/2021	\$5,980.78	Created	🟡	🟢	🔴	Verify 📄 ⬆️ ⬇️
812 1st Claim <span>1 Error</span>	West, Mary	12/01/2021 - 12/31/2021	\$6,180.14	Created	🟢	🟢	🔴	Verify 📄 ⬆️ ⬇️
812 1st Claim <span>1 Error</span>	West, Jay	01/01/2022 - 01/31/2022	\$6,180.14	Created	🟢	🟢	🔴	Verify 📄 ⬆️ ⬇️
812 1st Claim <span>1 Error</span>	West, Crystal	01/01/2022 - 01/31/2022	\$6,180.14	Created	🟢	🟢	🔴	Verify 📄 ⬆️ ⬇️
812 1st Claim <span>1 Error</span>	West, Maine	01/01/2022 - 01/31/2022	\$6,180.14	Created	🟡	🟡	🔴	Verify 📄 ⬆️ ⬇️
812 1st Claim <span>1 Error</span>	West, James	02/01/2022 - 02/28/2022	\$5,582.06	Created	🟢	🟢	🔴	Verify 📄 ⬆️ ⬇️
812 1st Claim <span>1 Error</span>	West, Karry	02/01/2022 - 02/16/2022	\$3,189.75	Created	🟡	🟢	🔴	Verify 📄 ⬆️ ⬇️
812 1st Claim <span>1 Error</span>	West, Opal	03/01/2022 - 03/09/2022	\$1,794.23	Created	🟢	🟡	🔴	Verify 📄 ⬆️ ⬇️
812 1st Claim	Houston, West	12/01/2021 - 12/31/2021	Not Applicable	Created	🟢	🟢	🔴	Verify 📄 ⬆️ ⬇️
813 Continuing Claim	Houston, West	01/01/2022 - 01/31/2022	Not Applicable	Created	🟡	🟡	🔴	Verify 📄 ⬆️ ⬇️

**Remittance Advice** - Automatically posted through all payers once received and the associated claims have payments and adjustments posted to the claims. There is also functionality to view and/or edit remittance.

Providers: All | Search by EFT Number... | MM/DD/YYYY - MM/DD/YYYY | Add Remittance

Provider	Check (EFT) Number	Payment Date	Payer	Payment Amount	Remaining Balance	Claim Count	Actions
Testing Home Health Agency, Inc.	2E03012022 <small>(Manually Created)</small>	03/28/2022	Medicare	\$36,524.00	\$36,524.00	1	Edit View Details
Testing Home Health Agency, Inc.	EFT101010 <small>(Manually Created)</small>	12/23/2021	Blue Cross Blue Shield	\$2,554.25	\$2,554.25	1	Edit View Details
Testing Home Health Agency, Inc.	EFT123 <small>(Manually Created)</small>	12/06/2021	Medicare	\$5,000.00	\$5,000.00	2	Edit View Details
Testing Home Health Agency, Inc.	test232141 <small>(Manually Created)</small>	11/01/2021	Medicare	\$222.00	\$222.00	1	Edit View Details
Testing Home Health Agency, Inc.	test02101 <small>(Manually Created)</small>	10/27/2021	Medicare	\$222.00	\$222.00	1	Edit View Details
Testing Home Health Agency, Inc.	test01122 <small>(Manually Created)</small>	10/14/2021	Medicare	\$500.00	\$500.00	1	Edit View Details
Testing Home Health Agency, Inc.	123456798000000 <small>(Manually Created)</small>	10/14/2021	Medicare	\$1.00	\$1.00	1	Edit View Details
Testing Home Health Agency, Inc.	test222 <small>(Manually Created)</small>	10/01/2021	Medicare	\$222.00	\$222.00	1	Edit View Details
Testing Home Health Agency, Inc.	test101012021 <small>(Manually Created)</small>	10/01/2021	Medicare	\$111,112,954.00	\$111,112,954.00	1	Edit View Details
Testing Home Health Agency, Inc.	test111 <small>(Manually Created)</small>	09/01/2021	Medicare	\$134,533.00	\$134,533.00	1	Edit View Details
Testing Home Health Agency, Inc.	sadsssss <small>(Manually Created)</small>	07/31/2021	Medicare	\$111,111.00	\$111,111.00	1	Edit View Details

**Collections** - Enables users to edit outstanding claims. When editing an outstanding claim, users can view payment and adjustment activity and add adjustments (permissions based).

All Branches | Billing Period End Date | Payers: All | Patient Status: All | Claim Status: All | Search by Patient Name | Export

Age	Patient Name	Type of Bill	Billed Date	Billing Period	Payer	Status	Billed Amount	Expected Amount	Total Payments	Adjustments	Balance	Actions
1100	KOG, frequency	812 1st Claim	04/01/2020	03/01/2020 - 03/31/2020	Medicare	Saved	\$7,283.75	\$6,283.75	\$0.00	\$12.00	\$6,071.75	Edit Print
1059	Hoopra, Jake	812 1st Claim	06/01/2020	05/06/2020 - 05/31/2020	Medicare	Saved	\$5,655.25	\$5,655.25	\$0.00	\$0.00	\$5,655.25	Edit Print
1059	Accord, Angel	813 Continuing Claim	07/01/2020	06/01/2020 - 06/30/2020	Medicare	Paid	\$0.00	\$0.00	\$200.00	\$101.00	-\$301.00	Edit Print
986	Hoopra, Jake	813 Continuing Claim	07/24/2020	07/01/2020 - 07/23/2020	Medicare	Saved	\$3,546.83	\$3,546.83	\$0.00	\$0.00	\$3,546.83	Edit Print
978	Long, Mindy	812 1st Claim	08/01/2020	07/01/2020 - 07/31/2020	Medicare	Saved	\$1,200.00	\$1,200.00	\$0.00	\$0.00	\$1,200.00	Edit Print
917	Acosta, Patricia One	813 Continuing Claim	10/01/2020	09/01/2020 - 09/30/2020	Medicare	Paid	\$5,023.56	\$5,023.56	\$1,000.00	\$1,000.00	\$3,023.56	Edit Print
885	Abac, Pam	812 1st Claim	11/02/2020	10/28/2020 - 11/01/2020	Medicare	Paid	\$1,200.00	\$0.00	\$1,200.00	\$0.00	-\$1,200.00	Edit Print
858	Abac, Pam	813 Continuing Claim	12/01/2020	11/01/2020 - 11/30/2020	Medicare	Paid	\$6,068.62	\$5,676.62	\$5,676.62	\$392.00	-\$392.00	Edit Print

**Claims History** - Check the status of all claims for patients including functionality to create a new NOE, NOTR and/or Claim. Also make edits, print, download and delete.



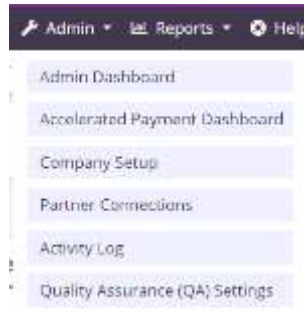
Branch: All | Status: All | Level of Care: All

Accord, Angel | MRN: Accord010 | Medicare Number: 321654987A | View Patient Chart | New NOE | New NOTR | New Claim

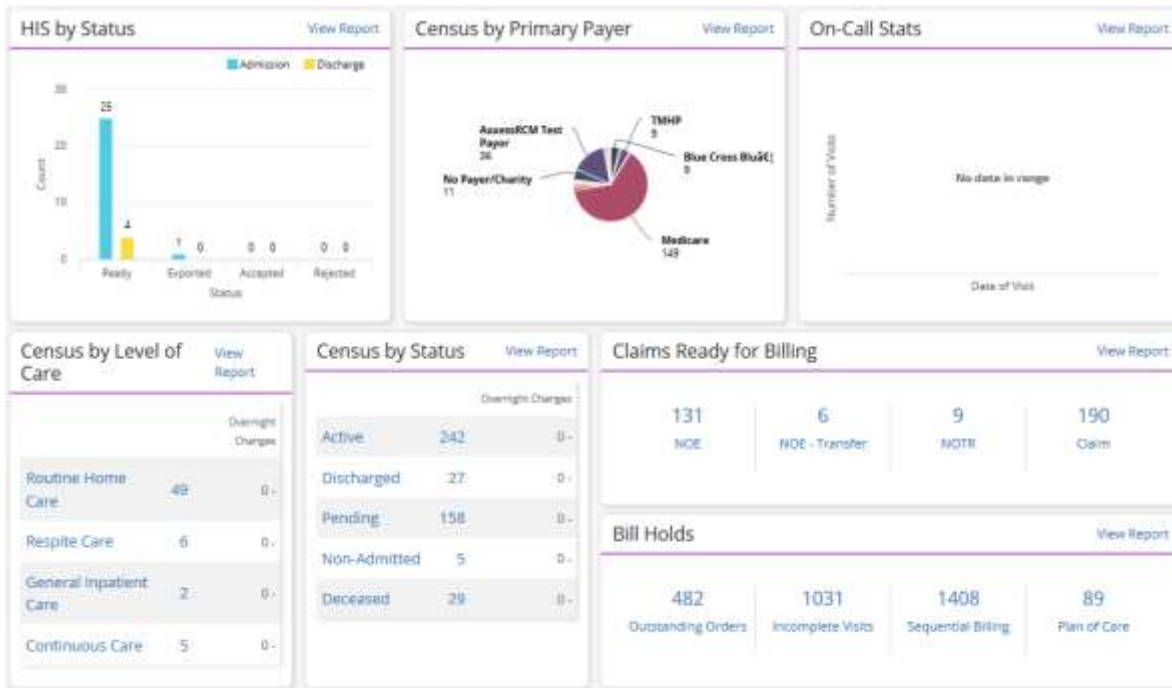
Type	Claim Range	Status	Claim Amount	Expected	Payments	Adjustments	Balance	Billed Date	Payment Date	Actions
813 Continuing Claim	09/01/2020 - 09/30/2020	Created	\$0.00	Not Applicable	\$0.00	\$0.00	\$0.00	Not Available	Not Available	[Icons]
812 1st Claim	08/01/2020 - 08/31/2020	Created	\$0.00	Not Applicable	\$0.00	\$0.00	\$0.00	Not Available	Not Available	[Icons]
813 Continuing Claim	08/01/2020 - 08/31/2020	Created	\$0.00	Not Applicable	\$0.00	\$0.00	\$0.00	Not Available	Not Available	[Icons]
813 Continuing Claim	07/01/2020 - 07/31/2020	Created	\$0.00	Not Applicable	\$0.00	\$0.00	\$0.00	Not Available	Not Available	[Icons]
813 Continuing Claim	06/01/2020 - 06/30/2020	Saved	\$0.00	Not Applicable	\$0.00	\$0.00	\$0.00	Not Available	Not Available	[Icons]
813 Continuing Claim	05/01/2020 - 05/31/2020	Created	\$0.00	Not Applicable	\$0.00	\$0.00	\$0.00	Not Available	Not Available	[Icons]

## ADMIN

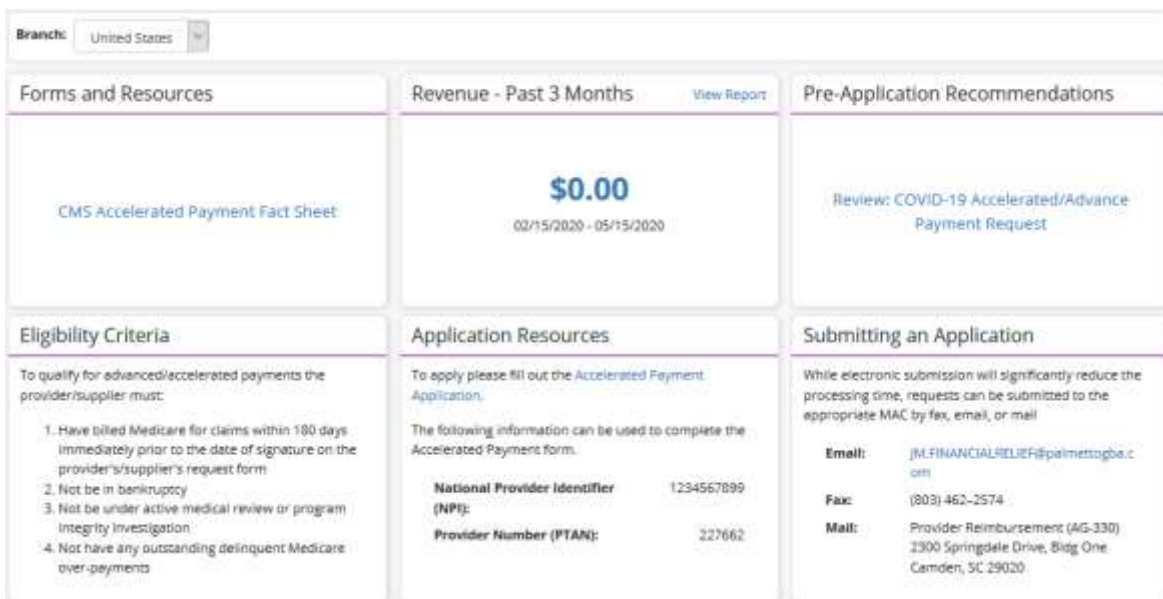
The **Admin** menu allows access to the following actions based on permissions granted to the user. NOTE: See Admin manual for further details.



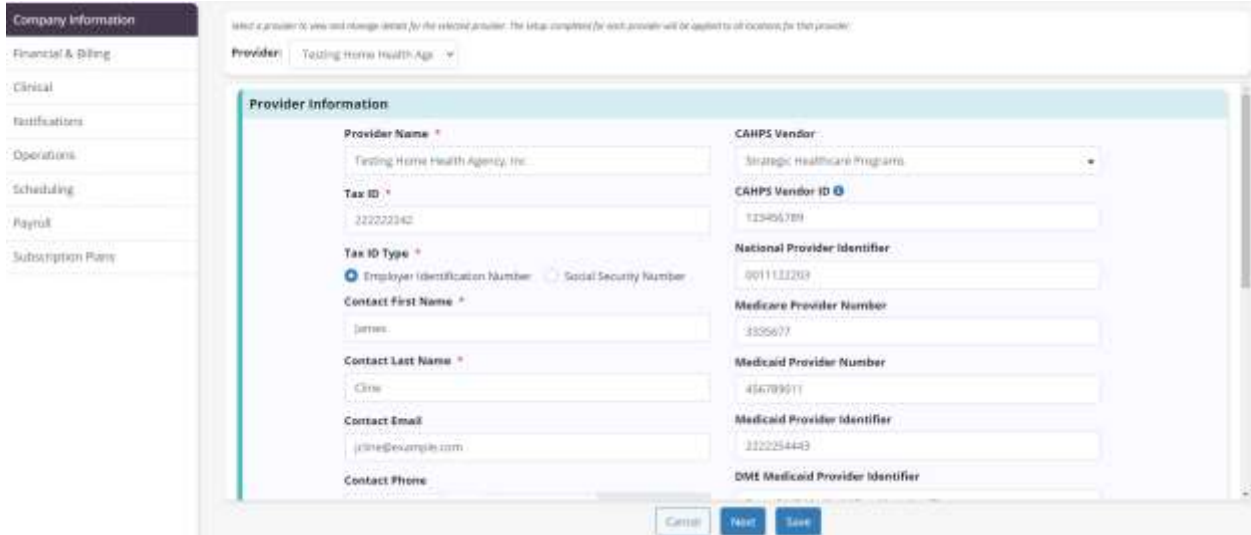
**Admin Dashboard** - The Admin Dashboard shows seven tiles to provide administrators a broad scope of the organization's standing including HIS by Status, Census by Primary Payer, On-Call Stats, Census by Level of Care, Census by Status, Claims Ready for Billing and Bill Holds.



**Accelerated Payment Dashboard** - Six tiles that provide forms, resources and information to help organizations apply for accelerated payment including Forms and Resources, Revenue - Past three Months, Pre-Application Recommendations, Eligibility Criteria, Application Resources and Submitting an Application.



**Company Setup** – Company-wide settings and information are managed from this screen including Company Information, Financial & Billing, Clinical, Notifications, Operations, Scheduling, Payroll and Subscription Plans.



The screenshot shows a web form titled "Provider Information" for "Testing Home Health Agency, Inc.". The form is divided into two columns of input fields. The left column includes fields for "Provider Name", "Tax ID", "Tax ID Type" (with radio buttons for "Employer Identification Number" and "Social Security Number"), "Contact First Name", "Contact Last Name", "Contact Email", and "Contact Phone". The right column includes fields for "CAHPS Vendor", "CAHPS Vendor ID", "National Provider Identifier", "Medicare Provider Number", "Medicaid Provider Number", "Medicaid Provider Identifier", and "DME Medicaid Provider Identifier". At the bottom of the form are "Cancel", "Next", and "Save" buttons.

**Partner Connections** – Enables users to connect with internal and external providers to electronically transmit patient referrals. Once a partner connection has been established on the Admin Dashboard, users can transfer referrals to that partner on the Referrals screen (permissions based).

Partner Connections

Line of Service: All | Providers: All | Status: All

[Create Partner Invitation](#) [Accept Partner Invitation](#)

Associated Providers	Line of Service	Partner	Connection Status	Actions
Testing Home Health Agency, Inc	Hospice		Pending	<a href="#">Deactivate</a>
Testing Home Health Agency, Inc	Hospice		Pending	<a href="#">Deactivate</a>
Testing Home Health Agency, Inc	Hospice	Liberty Hospice - Palliative Sandbox	Active	<a href="#">Deactivate</a>
Testing Home Health Agency, Inc	Hospice		Pending	<a href="#">Deactivate</a>
Testing Home Health Agency, Inc	Palliative Care		Pending	<a href="#">Deactivate</a>
Testing Home Health Agency, Inc	Palliative Care		Pending	<a href="#">Deactivate</a>
Testing Home Health Agency, Inc	Palliative Care	Testing Palliative Agency	Active	<a href="#">Deactivate</a>
Testing Home Health Agency, Inc	Palliative Care		Pending	<a href="#">Deactivate</a>
Testing Home Health Agency, Inc	Palliative Care		Pending	<a href="#">Deactivate</a>
Testing Home Health Agency, Inc	Palliative Care	Enterprise Demo Agency (HOS)	Active	<a href="#">Deactivate</a>

1 | 10 total results | Show 10 entries

**Activity Log** – Displays the date each action was performed, the user who performed the action, and what action was performed. Select **View Details** in the **Actions** column to view additional details (permissions based).

Activity Log

Date	User	Category	Summary	Actions
04/06/2023	Crystal Buffington	IDG Summary Document	IDG Summary Document-Create	<a href="#">View Details</a>
04/06/2023	Crystal Buffington	Scheduled Task	Scheduled Task-Create	<a href="#">View Details</a>
04/06/2023	Crystal Buffington	Patient	Patient-Convert Referral	<a href="#">View Details</a>
04/06/2023	Crystal Buffington	Referral	Referral-Convert Referral	<a href="#">View Details</a>
04/06/2023	Crystal Buffington	Patient	Patient-Update Patient	<a href="#">View Details</a>
04/06/2023	Crystal Buffington	Patient Payor	Patient Payor-Create	<a href="#">View Details</a>
04/06/2023	Crystal Buffington	Patient Payor	Patient Payor-Create	<a href="#">View Details</a>
04/06/2023	Crystal Buffington	Patient Payor	Patient Payor-Create	<a href="#">View Details</a>
04/06/2023	Crystal Buffington	Referral	Referral-Update Referral	<a href="#">View Details</a>

**Quality Assurance (QA) Settings** – When the organization chooses to have tasks bypass the QA Center, they can choose those tasks from the Admin Dashboard or choose specific tasks for individual users to bypass the QA Center. Tasks chosen to bypass an individual user will override the tasks selected on the Admin Dashboard (permissions based).

Quality Assurance (QA) Settings

Agency Provider	Task(s) to Bypass	Created By	Created Date	Last Modified	Actions
Testing Home Health Agency, Inc	Psychosocial Comprehensive Assessment, Psychosocial Phone Visit, Psychosocial PRN Visit, Psychosocial Telehealth Note, Psychosocial Visit	Esther Timothy	01/20/2023	01/20/2023	<a href="#">Edit</a> <a href="#">Delete</a>
Testing Home Health Agency, Inc	Nurse Practitioner Visit	Emily White	01/03/2023	01/03/2023	<a href="#">Edit</a> <a href="#">Delete</a>
Testing Home Health Agency, Inc	Volunteer Comprehensive Assessment	Emily White	01/03/2023	01/03/2023	<a href="#">Edit</a> <a href="#">Delete</a>
Testing Home Health Agency, Inc	Hospice Physician Visit	Emily White	01/03/2023	01/03/2023	<a href="#">Edit</a> <a href="#">Delete</a>

4 total results      Show 10 entries

## REPORTS

The **Reports** Menu houses all three dashboards previously seen in other menus including Patients, Orders, Schedule, Billing, Admin and the Report Center.



**Report Center** - Enables organizations to easily retrieve the reporting they need to streamline operations and optimize performance across every area of business. The reports are categorized by Patient, Clinical, Schedule, People, Statistical, Survey and Billing and Financial Reports.

Search by Report Name		
<b>Patient Reports</b> <ul style="list-style-type: none"> <li>Admission Report</li> <li>Referral Report</li> <li>Reading Room Report</li> <li>Outpatient Lab/Ref Lab</li> <li>Order by Report</li> <li>Ordered by Physician Group</li> <li>Emergency Procedures Patient List</li> <li>Admitted Discharge</li> <li>Non-Admitted Patient</li> <li>Health Reporting Data</li> </ul>	<b>Clinical Reports</b> <ul style="list-style-type: none"> <li>Selected Nursing Care Plans</li> <li>Referral Diagnosis Report</li> <li>Immunization History Report</li> <li>SN-Cat Data</li> <li>Outstanding Orders by Age</li> <li>Orders Pending QA Approval</li> <li>Top Physicians with Outstanding Orders</li> <li>Outstanding Orders by Type</li> <li>Outstanding Frequency Report</li> <li>Supervisory Visit Report</li> </ul>	<b>Schedule Reports</b> <ul style="list-style-type: none"> <li>Appointment Book</li> <li>Outpatient Appointment Book</li> <li>MRG History</li> <li>Procedure Book Report</li> <li>Schedule Types</li> <li>Workload by Day</li> <li>Work History by Date Range</li> </ul>
<b>People Reports</b> <ul style="list-style-type: none"> <li>Reporting Physician Location Report</li> <li>Report by Staff Report</li> <li>Reporting Document Report</li> <li>Reporting Document Report</li> <li>Report Report</li> </ul>	<b>Statistical Reports</b> <ul style="list-style-type: none"> <li>Days Without Order History Info</li> <li>2012 Year Book</li> <li>Referral Comparison Report</li> <li>Percentage of Date Paid by Service Location</li> <li>Reasons for Discharge</li> <li>Location of Date Provided</li> <li>Average Date Cancel</li> <li>Order by Reason Report</li> <li>Case Review</li> <li>Median Length of Stay</li> <li>MO by Reason</li> <li>Average Length of Stay</li> </ul>	<b>Survey Reports</b> <ul style="list-style-type: none"> <li>Survey Report</li> <li>Statistical Patient Report</li> <li>Survey by Service Location</li> <li>Survey by Staff List</li> <li>Demographic Summary by Reason</li> <li>Effective Date by Reason</li> </ul>
<b>Billing and Financial Reports</b> <ul style="list-style-type: none"> <li>General Ledger Report</li> </ul>		

**Orders Dashboard** - Helps assist organizations to quickly identify issues and resolve them. The five tiles shown include Outstanding Orders by Type, Top Physicians with Outstanding Orders, Reasons Preventing Billing, Outstanding Orders by Age and Orders Pending QA Approval. NOTE: See Orders Management manual for further details.

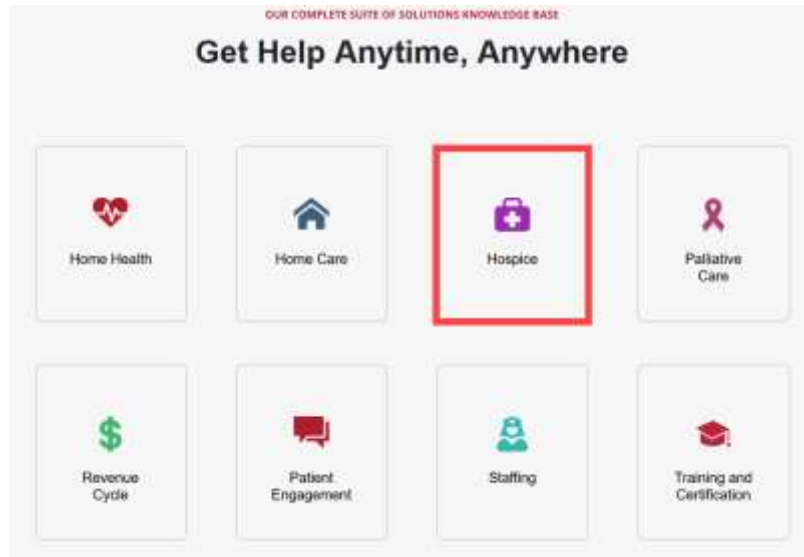


## HELP



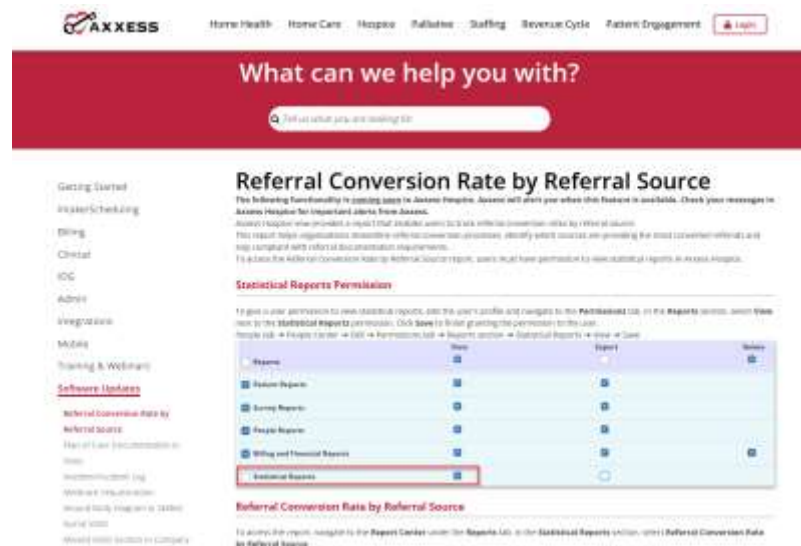
**User Community** – A direct link to [www.comunity.axxess.com](http://www.comunity.axxess.com) where users can share their knowledge and learning together with other Axxess users.

**Help Center** - This is a direct link to the Axxess Help Center. This page is also found by going to [www.axxess.com/help](http://www.axxess.com/help)



**On-Demand Training** - A direct link to the Axxess Help Desk hospice training videos page which enables users to watch training videos at any time.

**Recent Software Updates** - A direct link to the Axxess Help Desk Hospice Software Updates page which can also be found at [www.axxess.com/help/axxesshospice/software-updates/](http://www.axxess.com/help/axxesshospice/software-updates/).

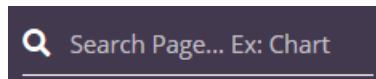


**Submit a Ticket** - A platform to provide communication and support for users. Each organization will choose up to four super users to directly engage with the Axxess Support Team to request help.

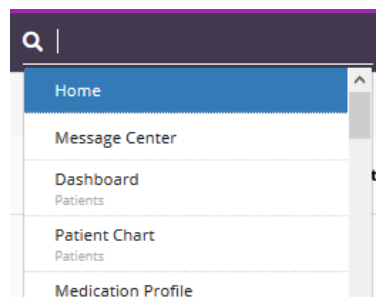
**COVID-19 Resource Center** - A direct link to the Axxess COVID-19 Resource Center which includes Best Practices, Hear from Experts, Helpful Downloads, Personal Protective Equipment (PPE) and Helpful Links. The page can also be found by going to [www.axxess.com/covid-19](http://www.axxess.com/covid-19).

**Follow Axxess** – A direct link to the Axxess LinkedIn page.

## SEARCH

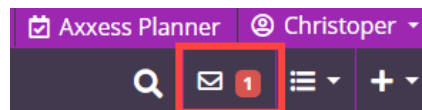


The search function at the far-right side of the navigation bar is used to navigate to different sections of the software by entering the name of the section then selecting from the list of options.

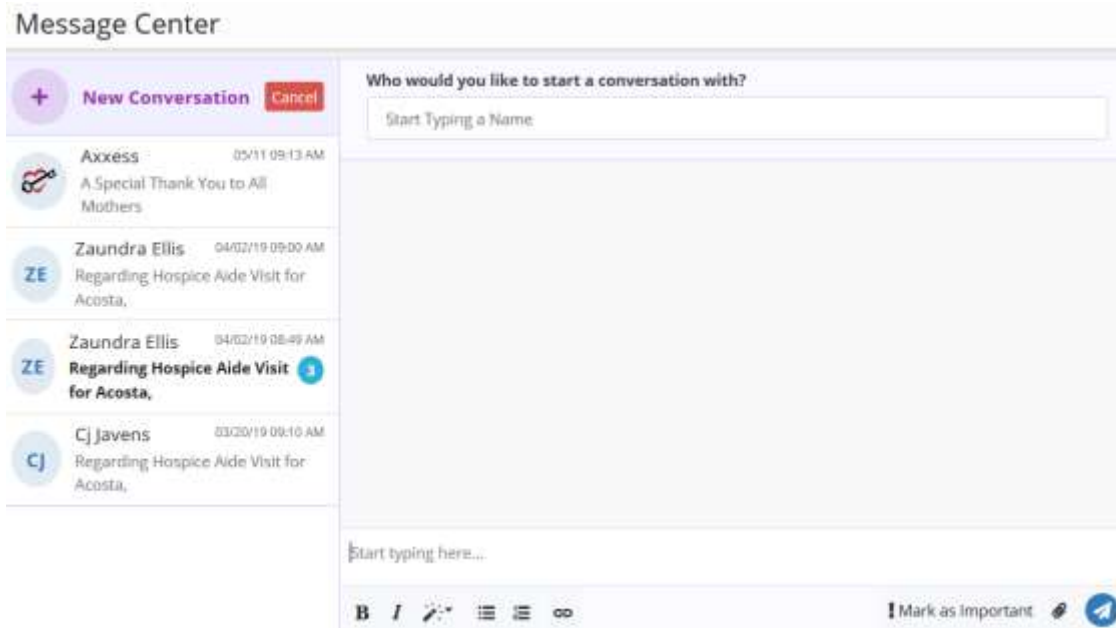


## MESSAGE CENTER

The Message Center is a place for all staff to communicate internally related to patient care with functionality to attach items and message groups as well as individuals. There are two ways to access notifications/messages. Either select the envelope icon at the top right side of the page or the **View All Messages** hyperlink at the bottom of the Unread Messages tile on My Dashboard.





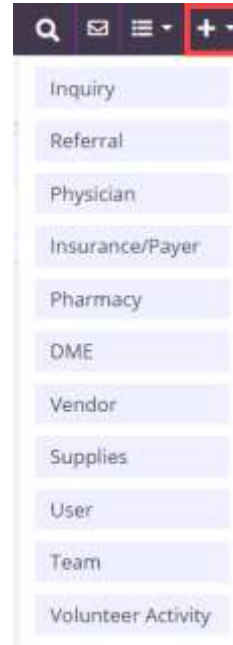




## CREATE AND LISTS

The top right-hand corner of Axxess Hospice houses the Lists and Add sections which are permissions based.

- Lists are found in the  icon.
- Add list is found in the  icon.



## RESET LOGIN PASSWORD

To reset the Axxess login password, follow one of the methods listed below:

### Current Login Password is Unknown

Navigate to the login page and select the **Having trouble logging in?** hyperlink. Continue to follow the prompts to enter the email address used to log in to Axxess and select **Send**. This will send a password reset link to the user's email address.



## Current Login Password is Known

*\*Username\*/Profile*



Select the Password line.



Enter the current password, a new password and then confirm password. Select the **Change Password** button when finished.

