

HOME CARE OFFICE STAFF (INTAKE AND SCHEDULING) TRAINING MANUAL

August 2020

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LOGGING IN TO 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-hand side of the webpage.



The sign-in 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 have been entered, select **Secure Login** to enter Axxess' software.

The image shows the login page of the Axxess software. It features the Axxess logo at the top. Below the logo are two input fields: 'Email address' and 'Password'. A red error message 'This field is required.' is displayed next to the Password field. Below the input fields is a checkbox labeled 'Remember Me' and a link 'Forgot your Password?'. At the bottom of the form is a large red button labeled 'Secure Login'. The footer of the page contains the text 'Axxess | Copyright © 2008 - 2018 | All Rights Reserved | Dallas, Texas'.

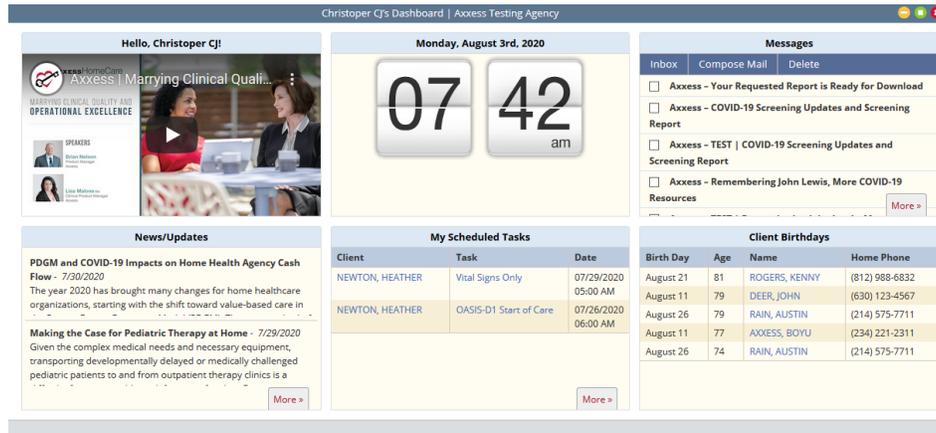
NOTE: For resetting the password, See Overview.

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

The image shows a 'Login Successful' dialog box. It features the Axxess logo at the top. Below the logo is the title 'Login Successful' and a paragraph of text: '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 of the dialog box are two buttons: 'Cancel' and 'OK'. The footer of the dialog box contains the text 'Axxess | Copyright © 2008 - 2017 | All Rights Reserved | Dallas, Texas'.

The Axxess Planner displays. Select the appropriate Axxess application on the left side of the page to perform the Intake and Scheduling process.

DASHBOARD



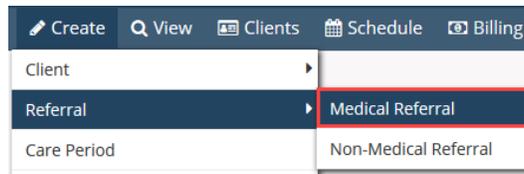
The dashboard can display six tiles. Three of these tiles are default and, the remaining three will be based on user permissions.

- Welcome Panel - The center of the screen will display items for subscribers to Axxess products. Items will consist of everything from important announcements to in-depth training videos.
- Local - This box will display the current date and time for the current location.
- Messages - HIPAA-compliant email messaging center that enables all agency users to communicate in a secure manner. When the user receives messages, notifications will be sent to the user's email assigned to their account.
- News/Updates - Links to Axxess generated blog posts, educational articles, regulatory updates, and other important information.
- My Scheduled Tasks - Electronic "To-Do" list. Quickly access a client chart and tasks. The tile will display the five most recent clients and their tasks.
- Client Birthdays - This is a quick reminder of the clients who will celebrate birthdays in the upcoming week/month, so that thoughtful birthday cards can be sent out, optimizing positive client/provider relationships.

REFERRAL ENTRY

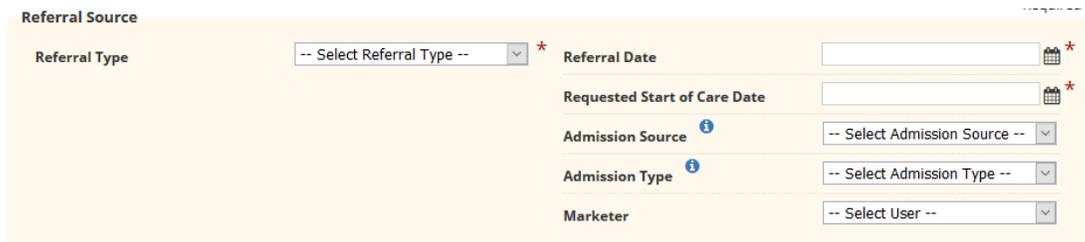
Create/Referral/Medical Referral

There are two options to add a Client into 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.



- 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.

Demographics

First Name * Date of Birth January Day Year *
 Middle Initial Check for an existing client or referral that has the same name and date of birth as the referral you are creating. *
 Last Name *

Address Line 1 * Gender -- Select Gender -- *
 Address Line 2 Medicaid Number
 City/Town * Alternate Medicaid Number
 State -- Select State -- * Social Security Number
 Postal Code - * Do Not Resuscitate No
 Country United States * Marital Status -- Select Marital Status --
 Address Validation Height in
 Agency Branch Dallas * Weight lb
 Pay Rate Municipality -- Select Municipality --
 Phone Type -- Select Phone Type -- *
 Primary Phone - - *
 Email Separate multiple emails with ;

Required items in the Demographics section include:

- Name - Enter Client's First Name and Last Name.
- Address Line 1 - Where the client will be receiving care, City, State, Postal 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).
- Phone Type - Choose between Home, Mobile, Facility or Work.
- Primary Phone - Enter the client's primary phone number.
- 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.
- Gender - Choose Male or Female.
- Do No Resuscitate - Choose Yes or No indicate if the client has a DNR request (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 inside Company Setup.

Services Required

Home Health Aide
 Medical Social Worker
 Personal Support
 Physical Therapy
 Skilled Nurse
 Speech Therapy
 Other

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

DME Needed

Equipment Name

Provider Name Model No. Serial No.

Non Standard Items

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.

Physician Information

Primary Physician

Referral Source

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

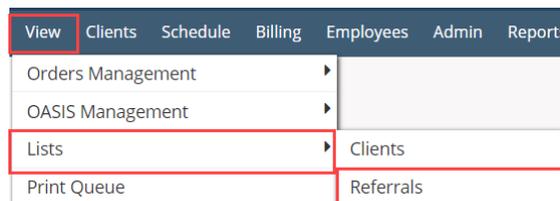
Comments - Enter free text comments or use the **Load Template** for pre-determined options.

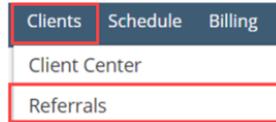
Then, select the **Save** button to place the client in the Pending Admission status.

VIEWING EXISTING REFERRALS

View/Lists/Referrals or Client/Referrals

After the client's referral has been created, the next step is admitting the client. There are two ways to locate the saved referral to proceed with the admission.





The Referral List will appear with the client's Referral Date, 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	Gender	Status	Created By	Medical	Action
07/15/2020	Test1, Dimple	Clinic or Physician's Office	01/04/1986	Female	Pending	Dimple Mistry RN	Yes	 Edit Delete Admit Non-Admit
07/14/2020	Johnson, Bob		01/11/1960	Male	Pending	Doran Senat RN	Yes	 Edit Delete Admit Non-Admit
03/31/2020	Jackie, Galvan		03/05/1970	Female	Pending	Dane Griffith 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 16000 Dallas Parkway suite 700 DALLAS, TX, 75248-9999 Phone: (214) 575-7711 Fax: (789) 797-7979		REFERRAL	
Source			
Referral Type	Self	Referral Date	07/15/2020
Referral Details		Marketer	Dimple Mistry RN
Admission Source	Clinic or Physician's Office		
Patient Demographics			
Name	Test1, Dimple N	Date of Birth	01/04/1986
Address Line 1	743 Brick Row Dr	Gender	<input checked="" type="checkbox"/> Female <input type="checkbox"/> Male
Address Line 2		Marital Status	0
District	N/A	City, State, Postal Code	RICHARDSON, TX 75081

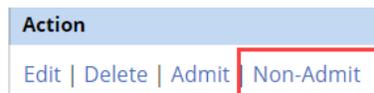
The Action column contains four options for the client's referral:

- **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 Actions 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.

* = Required Field

Non-Admission Details

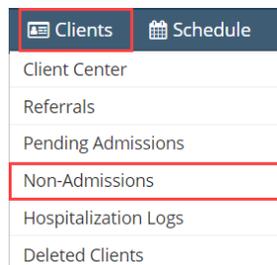
Referral TEST, TEST

Date  *

Reason *

Non-Admit Comments

Once the Non-Admission is processed, the list of Non-Admitted clients can be found in *Clients/Non-Admissions*.



Non-Admitted Clients | Axxess Testing Agency

Branch Filter by Text

New Client Excel Export Refresh

MRN	Client	Insurance	DOB	Phone	Phone Typ	Gender	Non-Admit Reason	Non-Admit Dal	Medic	Action
	Pumb, Eve		01/01/1960	(214) 575-7711	Mobile	Female	Inappropriate For Home Care	07/01/2020	No	Admit

ADMITTING A REFERRAL

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

Action
Edit Delete Admit Non-Admit

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. This is required before admitting the client.

Record Number	Last Number used: 15874	* Required
<input type="text"/>		

- 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.

Case Manager	-- Select Case Manager --	*
Assign to Clinician	-- Select Clinician --	*

- Emergency Triage - This section enables users to document the process during a state of emergency. Choose the appropriate level one through four and add any Additional Emergency Preparedness Information.

Emergency Triage		*
<input type="radio"/>	1 - Life threatening (or potential) and requires ongoing medical treatment. When necessary, appropriate arrangements for evacuation to an acute care facility will be made.	
<input type="radio"/>	2 - Not life threatening but would suffer severe adverse effects from interruption of services (i.e., daily insulin, IV medications, sterile wound care of a wound with a large amount of drainage.)	
<input type="radio"/>	3 - Visits could be postponed 24-48 hours without adverse effects (i.e., new insulin dependent diabetic able to self inject, sterile wound care with a minimal amount to no drainage)	
<input type="radio"/>	4 - Visits could be postponed 72-96 hours without adverse effects (i.e., post op with no open wound, anticipated discharge within the next 10-14 days, routine catheter changes)	
Additional Emergency Preparedness Information		
<input type="checkbox"/>	Need assistance during an emergency.	
<input type="checkbox"/>	Contact made with local/state emergency preparedness officials regarding client in need of help during an evacuation.	
<input type="checkbox"/>	Medical Needs/Equipment (i.e bedbound, oxygen, vent, IV cardiac meds other DME).	

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

- Pharmacies - Find patient pharmacy by starting to type 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).

Pharmacies

Pharmacy

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 Payment Source, Hierarchy and Relationship. Then enter Health Plan ID, Group Name, Group ID, Start and End Date (if applicable).

Payment Sources

Add the sources of payment for this client here. Leaving the end date blank will set the payment source as open ended.

-- Select Payment Source -- -- Select Hierarchy --

Health Plan Id -- Select Relationship --

Group Name Group Id

Start Date End Date

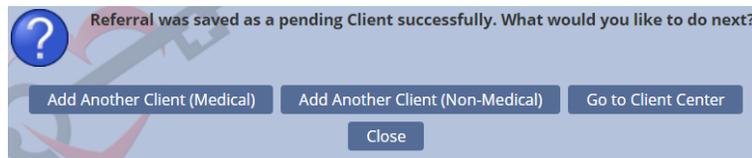
- Evacuation - This section is applied to clients that live in areas that require evacuation necessities. This is based upon the organization's policy and procedures. Choose the Evacuation Zone and enter the address/phone numbers. If Evacuation Address is the same as Emergency Contact, select the checkbox. 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**.

Contacts New Contact →

First Name	Last Name	Primary Phone	Relationship	Email	Action
John	Newsome	(555) 555-5555	Spouse		Edit Delete Make Primary

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.

Client Center | Axxess Testing Agency

Branch: -- All Branches -- | Create ▶ | View ▶ | Schedule ▶ | Documents ▶ | Billing ▶

Status: **Pending** | Type: All | Filter: All | Tags: | Find: test

TEST, TESTY ▶

Female, Age 69 - MRN: 15875

Physician: Ardeszna, Usha

DOB: 03/03/1949

SOC: 11/12/2018

Last Name ▶ First Name ▶

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

Branch: -- All Branches --

Status: **Active**

Type: All

Filter: All

Tags: | Find: test

INTRODUCTION TO CLIENT CENTER

Clients/Clients Center

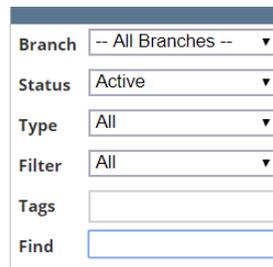
The Client Center is the client's electronic medical record.



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.

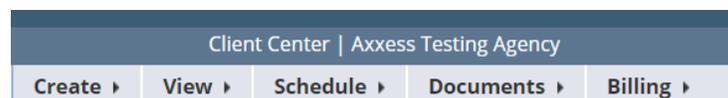
- Branch - This option allows the user to pick the client's branch.
- Status - Choose between Active, Discharge, Pending, Non-Admit or Hospitalized.
- Type - This option permits the ability to filter for Medical, Non-Medical or All types of clients. The system will default to "All."
- Filter - This option enables the user to narrow down the data by the payer.
- Tags - Enables filtering by tags the organization is using in the system.
- Find - Search client's name & list will appear when typing in letters by first or last name.



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

Client Center Top Menu

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

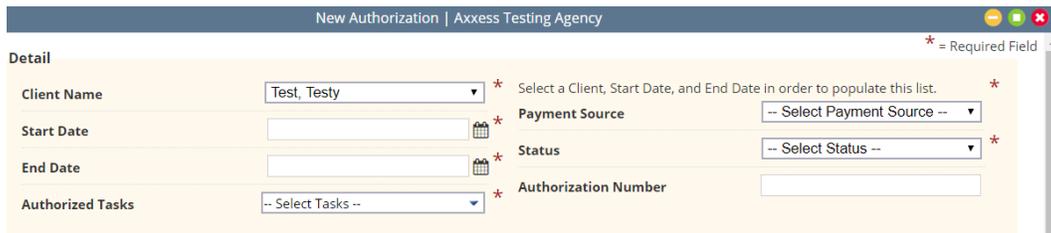


Create Tab

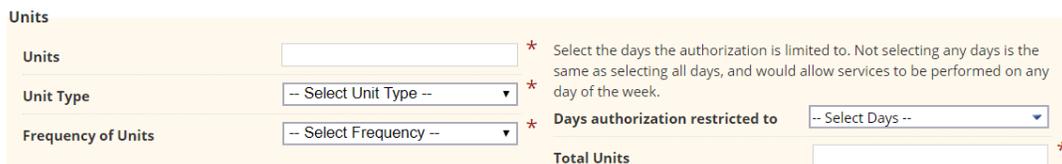
Order - This button provides the option to add a new order to the client's chart. An alternative route is *Create/Order*.

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/End date ranges and Authorized Task options will be required depending on the client's type of authorization.



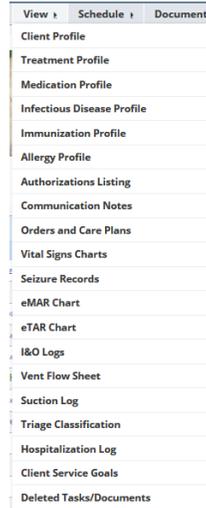
The Payment Source list pulls from the details indicated in the client's chart. The list will not generate until the Start/End dates are entered. The Status of the authorization can be indicated by selecting the options provided. Once the top section is completed, the Units section must be addressed 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” 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.



Client Profile - This section is the client’s Client Profile Data Sheet. It is a PDF Synopsis of the client’s profile. Upon viewing, the profile may be Downloaded, Printed, or Closed.

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					
Client	ABRAMS, JUANITA		Primary Diagnosis	I10. - Essential (primary) hypertension	
Current Care Period	12/20/2019 - Open		Secondary Diagnosis	I50 - Heart failure, unspecified	
Add Treatment Print Treatment Profile		Reorder Treatments			
ACTIVE TREATMENT(S)					
Start Date	Treatment	Description	Frequency	D/C Date	Action
09/09/2019	Aspiration	Aspiration Precautions at all times. HOB Elevated 30 degrees with feeding and 30 minutes AFTER feeding. Suction equipment with client at all times			
10/13/2019	CPT Vest Treatment	Administer CPT Vest treatment with settings: Frequency ____ Hz, Pressure ____ Time ____	Daily		
DISCONTINUED TREATMENT(S)					
Start Date	Treatment	Description	Frequency	D/C Date	Action
09/09/2019	Aspiration	Aspiration Precautions at all times. HOB Elevated 30 degrees with feeding and 30 minutes AFTER feeding. Suction equipment with Patient at all times		12/06/2019	
Refresh 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 Interactions**, view **Signed Medication Profiles**, and **Reorder Medications**.

Medication Profile								
Client	ABRAMS, JUANITA			Primary Diagnosis	I10. - Essential (primary) hypertension			
Current Care Period	12/20/2019 - Open			Secondary Diagnosis	I50 - Heart failure, unspecified			
Allergies	PENICILLINS IBUPROFEN, penicillin, dust			Pharmacy Name	Pharmacy Phone			
Add Medication Sign Medication Profile Print Medication Profile Drug Interactions Signed Medication Profiles Reorder Medications								
ACTIVE MEDICATION(S)								
LS	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy	D/C Date	Action
<input type="checkbox"/>		LASIX 20 MG ORAL TABLET Daily By mouth (PO)	N	cardiovascular agents				▶
DISCONTINUED MEDICATION(S)								
LS	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy	D/C Date	Action
<input type="checkbox"/>		LISINAPRIL 10 MG ORAL TABLET Before Meals By mouth (PO)	C	cardiovascular agents	Knutson, Jonathan OD	CVS PLANO	08/29/2017	▶

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.

Infectious Disease Profile							
Screenings							
Filter by Text						Add COVID-19 Screening	Infection Log
Entered By	Person Screened	Name of Person Screened	Type of Screening	Date of Screening	Risk Level	Screening Results	Actions
Sobush, Sonya RN	Client	ADAM, MARCIE	COVID-19	03/27/2020	High	Yes-3/4 questions	View

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

Add Immunization	Decline/Contraindicate Immunization	Export to Excel				
ACTIVE IMMUNIZATIONS						
Immunization	Administered?	Date Administered / Documented	Administered By	Lot #	Reason	Action
Flu	Yes	07/02/2017	Clinic			Delete Deactivate
Pneumonia	Yes	05/22/2018	Clinic			Delete Deactivate
INACTIVE IMMUNIZATIONS						
Immunization	Administered?	Date Administered / Documented	Administered By	Lot #	Reason	Action
Pneumonia	Yes	04/24/2017	K O'dell	123456		Delete Reactivate
Back Refresh Immunizations Exit						

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

Allergy Profile			
Client Name	ABRAMS, JUANITA	Physician	Knutson, Jonathan OD
<input type="button" value="Add Allergy"/> <input type="button" value="Refresh Allergies"/> <input type="button" value="Print Allergy Profile"/>			
ACTIVE ALLERGIES			
Name	Type	Action	
dust	dust in surrounding	Edit Delete	
penicillin	medication	Edit Delete	
PENICILLINS IBUPROFEN		Edit Delete	
DELETED ALLERGIES			
Name	Type	Action	

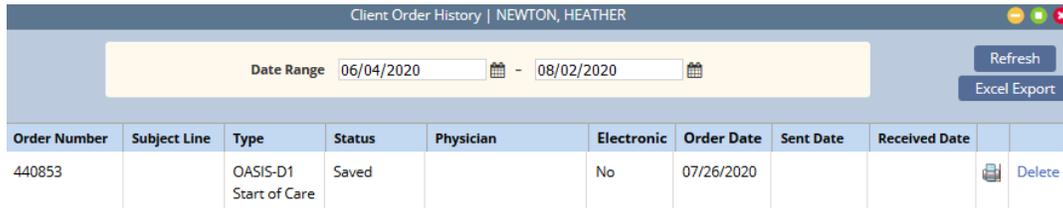
Authorizations Listing - Enables users to search/view/edit existing authorizations as well as add new authorizations as needed. Actions include the ability to view/print, **Edit**, evaluate and **Delete** existing authorizations as well as add new authorizations.

Authorization List NEWTON, HEATHER								
From 07/03/2020		To 10/01/2020	Payment Source All		<input type="button" value="Add Authorization"/> <input type="button" value="Excel Export"/> <input type="button" value="Refresh"/>			
Status Active		Filter by Text Start Typing						
Authorization Number	Payment Source	From - To	Status	Authorized Units	Scheduled Units	Available Units	Action	
<input type="checkbox"/> A1265	Private(Self Pay)	08/03/2020 - 10/03/2020	Active	60	0	60	<input type="button" value="Print"/> <input type="button" value="Edit Delete"/>	
<input type="button" value="Evaluate Authorizations"/>								

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 NEWTON, HEATHER					
Care Period 07/26/2020 - 09/23/2020		Filter by Text Start Typing			<input type="button" value="New Comm. Note"/> <input type="button" value="Excel Export"/> <input type="button" value="Refresh"/>
Employee Name	Subject Line	Date	Status	Action	
Cj Pierson RN	Labs Due	08/02/2020	Submitted Pending Co-Signature	<input type="button" value="Print"/> <input type="button" value="Edit Delete"/>	

Orders and Care Plans - Enables users to view existing Orders and Care Plans. Users may search by care period and further filter by text. Actions (permission-based) include the ability to view/print and **Delete**. The list of Orders and Care Plans may be exported to Excel.



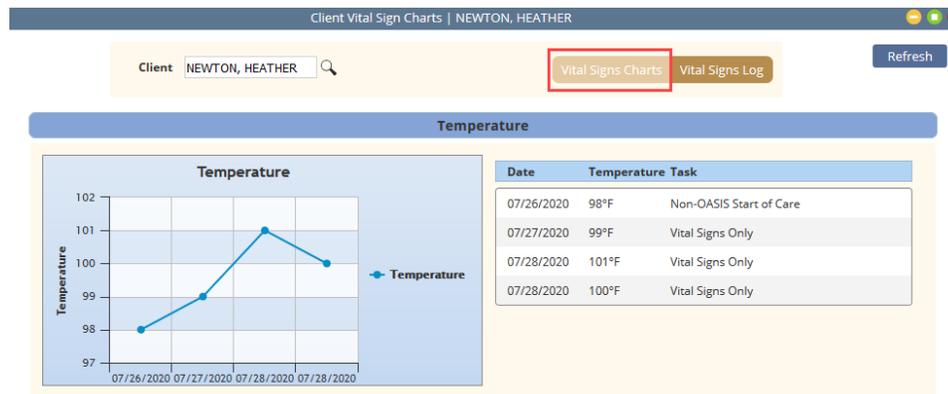
Client Order History | NEWTON, HEATHER

Date Range: 06/04/2020 - 08/02/2020

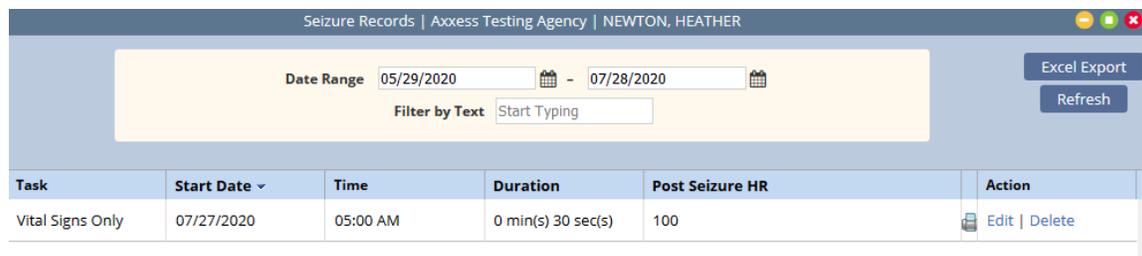
Buttons: Refresh, Excel Export

Order Number	Subject Line	Type	Status	Physician	Electronic	Order Date	Sent Date	Received Date	
440853		OASIS-D1 Start of Care	Saved		No	07/26/2020			Delete

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 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/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.



Seizure Records | Axxess Testing Agency | NEWTON, HEATHER

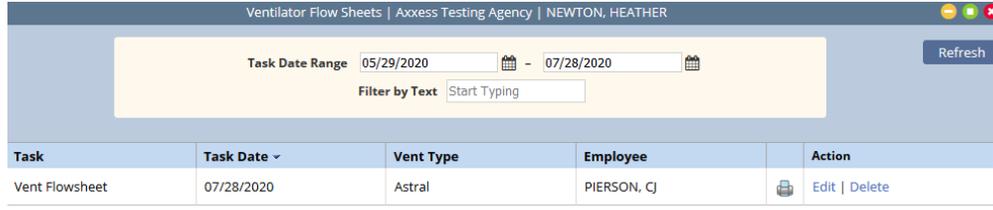
Date Range: 05/29/2020 - 07/28/2020

Filter by Text: Start Typing

Buttons: Excel Export, Refresh

Task	Start Date	Time	Duration	Post Seizure HR	Action
Vital Signs Only	07/27/2020	05:00 AM	0 min(s) 30 sec(s)	100	Edit Delete

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



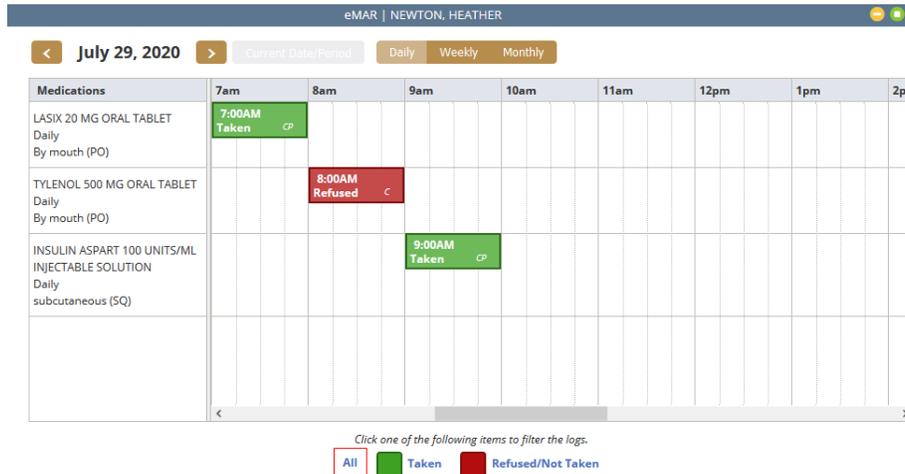
Ventilator Flow Sheets | Axxess Testing Agency | NEWTON, HEATHER

Task Date Range: 05/29/2020 - 07/28/2020

Filter by Text: Start Typing

Task	Task Date	Vent Type	Employee	Action
Vent Flowsheet	07/28/2020	Astral	PIERSON, CJ	Edit Delete

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.



eMAR | NEWTON, HEATHER

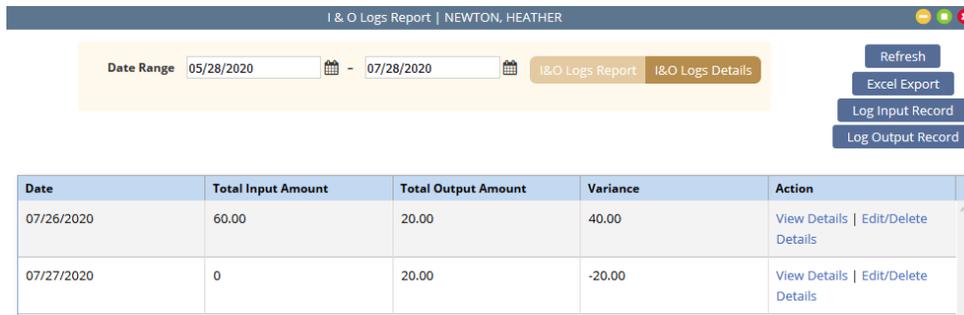
July 29, 2020 | Current Date/Period | Daily | Weekly | Monthly

Medications	7am	8am	9am	10am	11am	12pm	1pm	2pm
LASIX 20 MG ORAL TABLET Daily By mouth (PO)	7:00AM Taken							
TYLENOL 500 MG ORAL TABLET Daily By mouth (PO)		8:00AM Refused						
INSULIN ASPART 100 UNITS/ML INJECTABLE SOLUTION Daily subcutaneous (SQ)			9:00AM Taken					

Click one of the following items to filter the logs.

All Taken Refused/Not Taken

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, but users may view details by selecting the details link or toggle. Additional actions include the ability to **Edit/Delete Details** recorded values (permission based).



I & O Logs Report | NEWTON, HEATHER

Date Range: 05/28/2020 - 07/28/2020

I&O Logs Report | I&O Logs Details

Refresh
Excel Export
Log Input Record
Log Output Record

Date	Total Input Amount	Total Output Amount	Variance	Action
07/26/2020	60.00	20.00	40.00	View Details Edit/Delete Details
07/27/2020	0	20.00	-20.00	View Details Edit/Delete Details

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

Axxess 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 Emergency Contact	DOB: 01/15/1956 (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.			

Deleted Tasks/Documents - Axxess is a cloud-based software, so most deleted data will remain in the system. Deleted tasks will be found in this section.

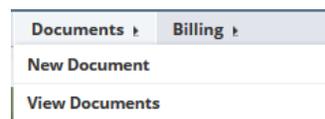
Client Deleted Tasks/Documents History ADAM, BILDAD					
Filter by Text <input type="text" value="Start Typing"/>					Refresh
Task/Document	Scheduled Time	Actual Time	Status	User	Action
Intake Assessment	07/20/2020 07:00 AM	07/20/2020 07:00 AM	Not Yet Started	Shahira Khodaparast RN	Restore

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

Hospitalization Log NEWTON, HEATHER										
Source	In Date	End Date	Status	Last Home	User	Facility	Unit	Contact	Payment Sour	Action
User-Generated Transfer	07/28/2020		Hospitalize	07/28/2020	PIERSON, CJ	Memorial West	1a	DC Planner		Edit Delete

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

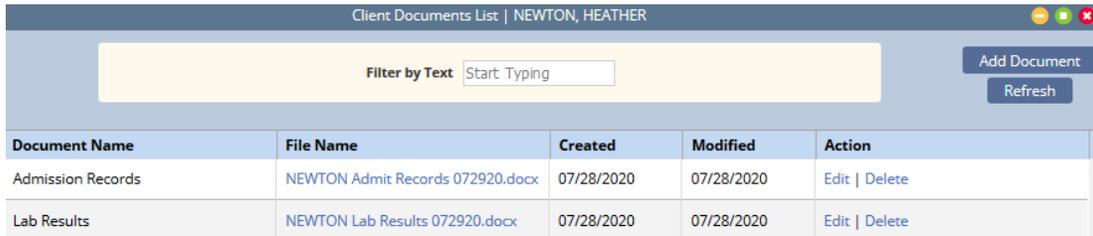
Documents Tab - The **Documents** Menu has two options available to select:



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 view existing client documents.



Document Name	File Name	Created	Modified	Action
Admission Records	NEWTON Admit Records 072920.docx	07/28/2020	07/28/2020	Edit Delete
Lab Results	NEWTON Lab Results 072920.docx	07/28/2020	07/28/2020	Edit Delete

Billing Tab - The Billing tab has two options available to select: New Invoice and Invoice History.

Client Center Client Profile

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



TEST, TESTY ➤ DNR

Female, Age 69 - MRN: 15875

Physician: Ardeshna, Usha

DOB: 03/03/1949 Phone

SOC: 11/12/2018 Phone Type: Medical

[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** button is available for the uploading process.
- The client's name will be indicated next to the picture. It will be viewed as Last name, First name.
 - 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 DNR will be visible next to the name.
- The organization assigned Medical Record Number (MRN) will be visible after the client's gender and age. **Female, Age 69 - MRN: 15875**

- The Physician, Date of Birth, Start of Care Date, Primary Phone number 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.

Physician: Ardeshta, Usha			
DOB	03/03/1949	Phone	(699) 999-9999
SOC	11/12/2018	Phone Type	Mobile
		Medical	Yes

Below the client's details are helpful hyperlinks:

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

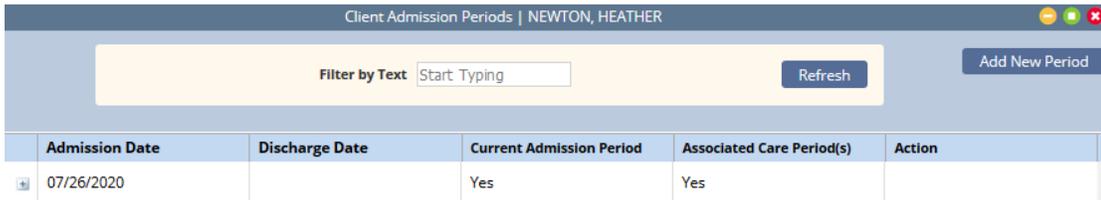
Edit - This hyperlink will open the client's chart which contains the referral and admission details (permissions based).

More - This hyperlink will produce additional client details.

MRN
Name
Gender
Address Line 1
Address Line 2
City
State, Zip
Primary Phone
Secondary Phone
Start of Care Date
Date of Birth
Physician Name
Physician Phone
Physician Fax
Emergency Name
Emergency Phone
DNR

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.



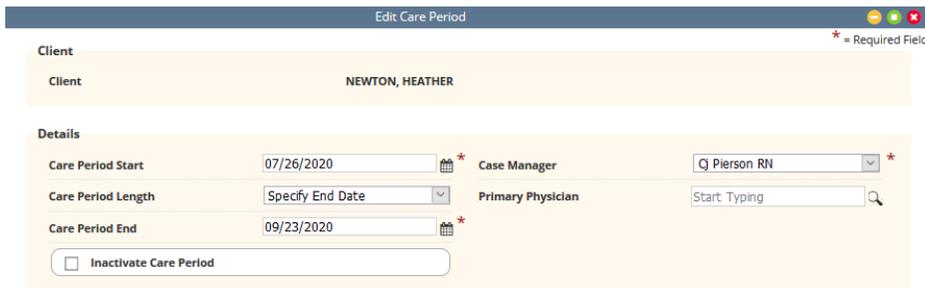
Admission Date	Discharge Date	Current Admission Period	Associated Care Period(s)	Action
<input type="checkbox"/> 07/26/2020		Yes	Yes	

Selecting the icon beside the Admission Date will generate more details pertaining to that admission period.

Admission Date	Discharge Date	Current Admission Period	Associated Care Period(s)	Action
<input checked="" type="checkbox"/> 07/26/2020		Yes	Yes	

Care Period Start Date	Care Period End Date	Action
07/26/2020	09/23/2020	Edit Care Period

In the Actions column, the ability to **Edit Care Period** will be visible for users with the corresponding permissions.



Edit Care Period * = Required Field

Client: NEWTON, HEATHER

Details:

Care Period Start: 07/26/2020 * Case Manager: Q Pierson RN *

Care Period Length: Specify End Date Primary Physician: Start Typing

Care Period End: 09/23/2020 *

Inactivate Care Period

For more details, please reference [Managing Episodes](#) in the [Schedule Center](#) section within this document.

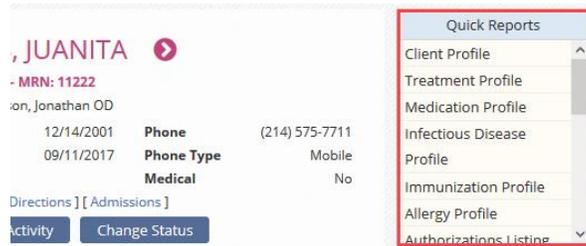
Blue Action Buttons

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

- **Refresh** - Refreshes the screen after making changes.
- **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: Client Name and Schedule-Schedule Activity.
- **Change Status** - Provides the ability to change the status of the Client.

Client Center Quick Reports

The list of items under the Quick Reports is also accessible from the **View** Tab. Reference **View** Tab section for an elaboration of the reports' content.



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 Show Date

- 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
OASIS-D1 Start of Care	07/26/2020	06:00 AM-07:00 AM	Cj Pierson RN	Saved
Vital Signs Only	07/27/2020	05:00 AM-06:00 AM	Cj Pierson RN	Submitted Pending Co-

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.

Task Status - Displays the current 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, Returned w/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.

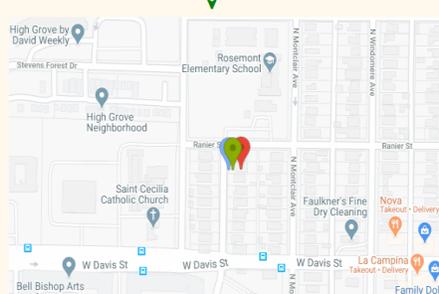
Verified EVV Log Edit Print

Client	PROD, DANE	Comments
MRN	83834	
Date of Birth	02/11/2011	
Start of Care	05/19/2019	
Task	Custom Visit - Mobile	
Payment Source	HHAX_Staywell FL	
Assigned To	Dane Ruccio RN	Client Signature
Visit Date	07/27/2020	
EVV Time In	07/27/2020 05:09 PM	
EVV Time Out	07/27/2020 05:10 PM	
Adjusted Time In	Not Collected	
Adjusted Time Out	Not Collected	
Client Address	630 N Rosemont Ave Dallas TX 75208	
Start EVV Address	630 N Rosemont Ave Dallas TX 75208	
End EVV Address	630 N Rosemont Ave Dallas TX 75208	

Client Address 📍

EVV Start Location 📍

EVV End Location 📍



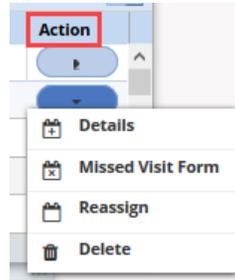
Sticky Notes - Yellow sticky notes show notes for a particular task, blue shows notes related to the whole care period, red shows missed visit notes and orange shows notes that are returned for review.

-  In Progress EW
-  Completed EW
-  Not Started EW
-  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.



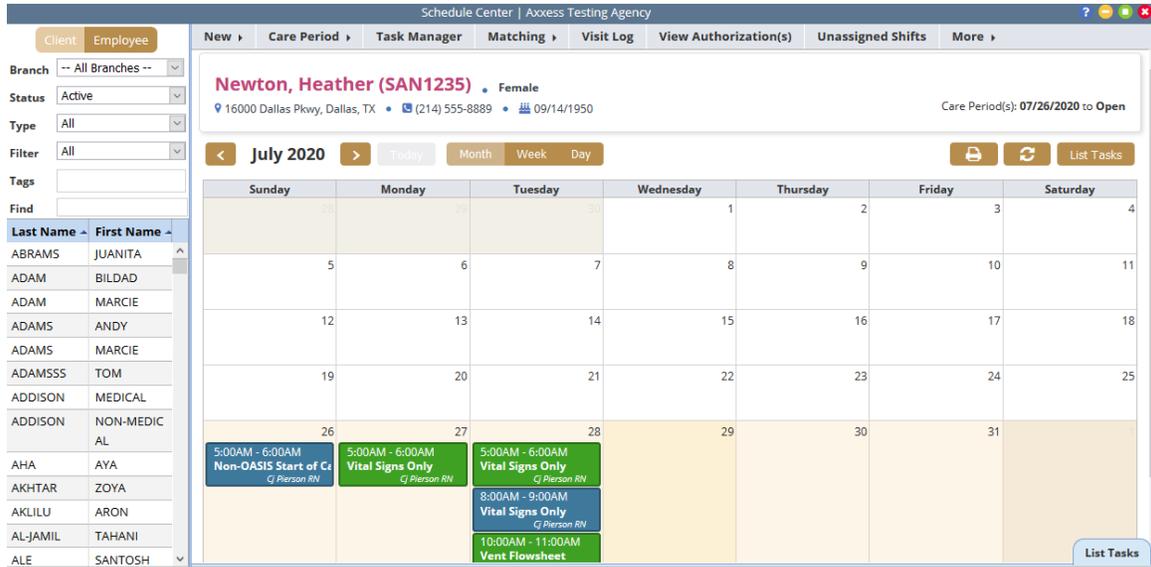
- **Details** - Provides information related to the task. Certain fields are available for editing based on the note status and may include: Document Name, Time in-out, Payer, Status, Employee, Surcharge/Mileage, Update Bill/Pay, Add Task (yellow) sticky note, add Supplies as well as the ability to upload up to 3 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.
- **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.



Newton, Heather (SAN1235) • Female
 16000 Dallas Pkwy, Dallas, TX • (214) 555-8889 • 09/14/1950
 Care Period(s): 07/26/2020 to Open

July 2020 | Today | Month | Week | Day

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
5:00AM - 6:00AM Non-OASIS Start of Care CJ Pierson RN	5:00AM - 6:00AM Vital Signs Only CJ Pierson RN	5:00AM - 6:00AM Vital Signs Only CJ Pierson RN				
		8:00AM - 9:00AM Vital Signs Only CJ Pierson RN				
		10:00AM - 11:00AM Vent Flowsheet				

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.

Client Employee

Branch -- All Branches --

Status Active

Type All

Filter All

Tags

Find

- **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 current 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).
- Filter - 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.

Schedule Center Axxess Testing Agency							
New ▾	Care Period ▾	Task Manager	Matching ▾	Visit Log	View Authorization(s)	Unassigned Shifts	Schedule Summary

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:

Client response...

NEWTON, HEATHER

Details

Care Period Start Date <input type="text" value="09/24/2020"/> *	Start of Care Date <input type="text" value="07/26/2020"/>
Last Care Period End Date is 09/23/2020	
Care Period Length <input type="text" value="Open"/>	Case Manager <input type="text" value="CJ Pierson RN"/> *
Primary Physician <input type="text" value="Start Typing"/>	

Comments (Blue Sticky Note)

- 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.

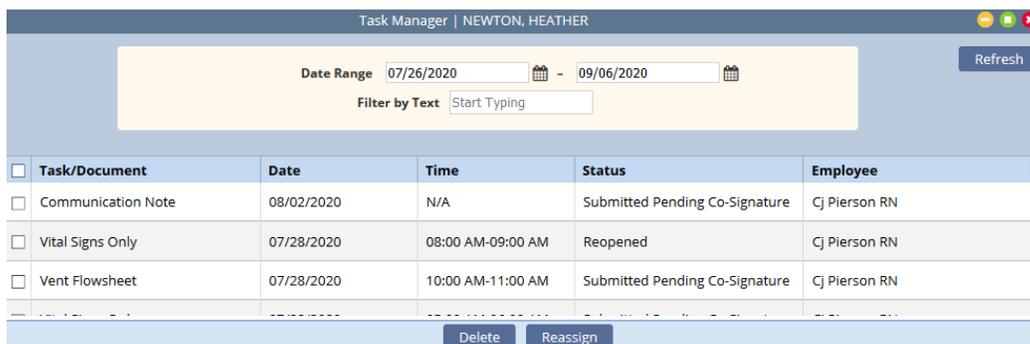


ACTIVE CARE PERIODS		
Start Date	End Date	Actions
07/26/2020	09/23/2020	Edit Deactivate

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 **Inactivate** care period.

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



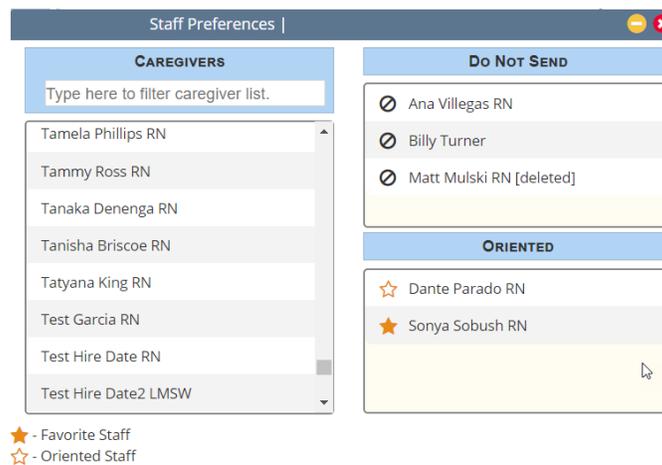
<input type="checkbox"/>	Task/Document	Date	Time	Status	Employee
<input type="checkbox"/>	Communication Note	08/02/2020	N/A	Submitted Pending Co-Signature	CJ Pierson RN
<input type="checkbox"/>	Vital Signs Only	07/28/2020	08:00 AM-09:00 AM	Reopened	CJ Pierson RN
<input type="checkbox"/>	Vent Flowsheet	07/28/2020	10:00 AM-11:00 AM	Submitted Pending Co-Signature	CJ Pierson RN

Tasks that have been Started or Completed cannot be reassigned.

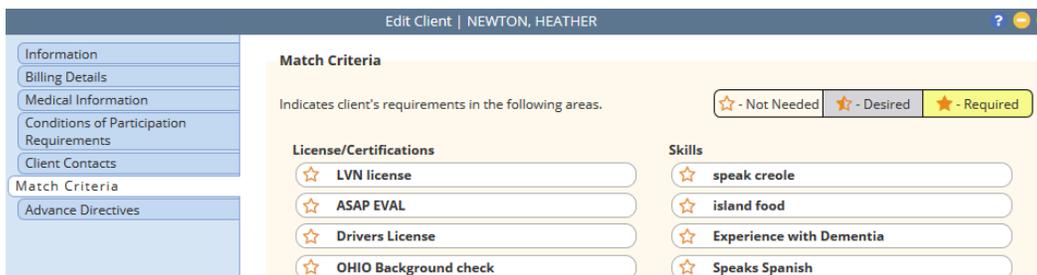
Matching - This tab has two submenus: **Preferences** and **Match Criteria**.

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.

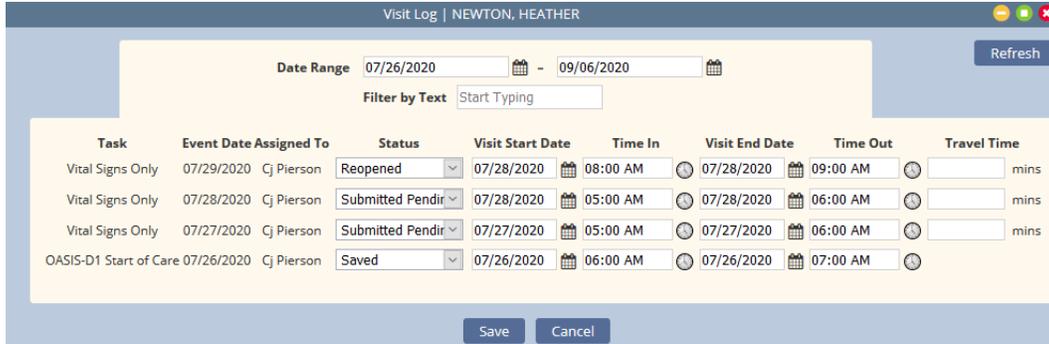


Match Criteria - Takes the user to the client's match criteria in their client file. From here, the client's criteria may be viewed or updated. The Matching list is created by the organization and is taken into consideration when using the matching functionality during the scheduling process.



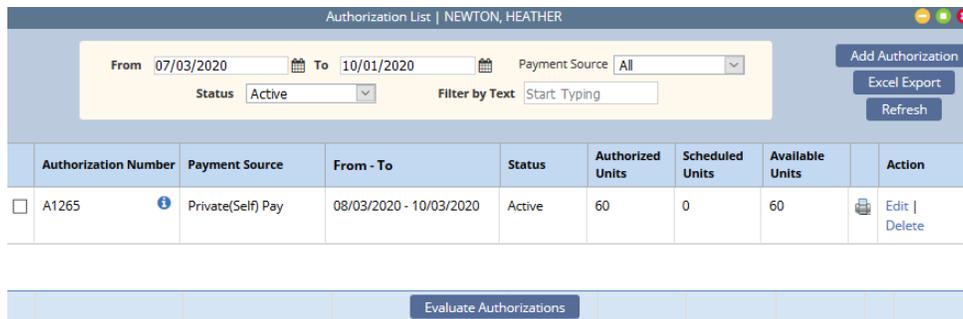
Visit Log - This option provides the ability to update specific information for billable tasks. This is particularly useful for updating non-system user information.

Task status, start and end dates, time in/out as well as travel time logging may all be updated from this menu.



Task	Event Date Assigned To	Status	Visit Start Date	Time In	Visit End Date	Time Out	Travel Time
Vital Signs Only	07/29/2020 Cj Pierson	Reopened	07/28/2020	08:00 AM	07/28/2020	09:00 AM	mins
Vital Signs Only	07/28/2020 Cj Pierson	Submitted Pending	07/28/2020	05:00 AM	07/28/2020	06:00 AM	mins
Vital Signs Only	07/27/2020 Cj Pierson	Submitted Pending	07/27/2020	05:00 AM	07/27/2020	06:00 AM	mins
OASIS-D1 Start of Care	07/26/2020 Cj Pierson	Saved	07/26/2020	06:00 AM	07/26/2020	07:00 AM	

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



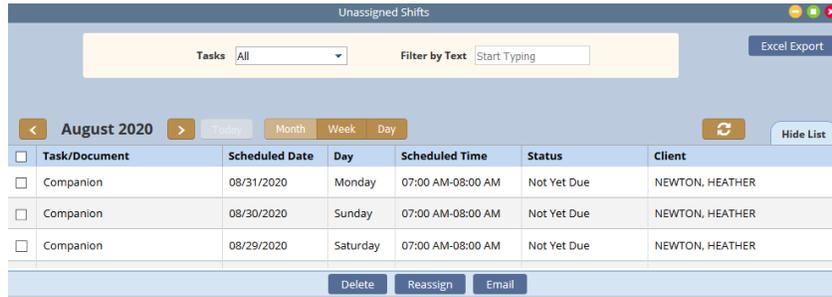
Authorization Number	Payment Source	From - To	Status	Authorized Units	Scheduled Units	Available Units	Action
<input type="checkbox"/> A1265	Private(Self) Pay	08/03/2020 - 10/03/2020	Active	60	0	60	Edit Delete

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

Authorization Number	Tasks:
A1265	Kelechi Custom FL SN ASSESSMENT Kim Non-Medical Assessment Intake Assessment

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
Companion	08/31/2020	Monday	07:00 AM-08:00 AM	Not Yet Due	NEWTON, HEATHER
Companion	08/30/2020	Sunday	07:00 AM-08:00 AM	Not Yet Due	NEWTON, HEATHER
Companion	08/29/2020	Saturday	07:00 AM-08:00 AM	Not Yet Due	NEWTON, HEATHER

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.
- **Schedule Start/Schedule End** - Shows the 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.

Newton, Heather (SAN1235) • Female
 16000 Dallas Pkwy, Dallas, TX • (214) 555-8889 • 09/14/1950

Filter Tasks

Payment Source: Tasks: Refresh

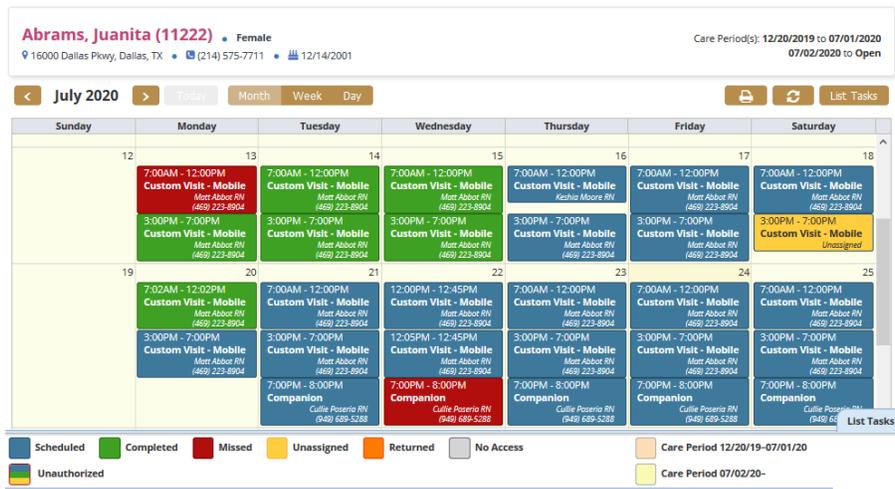
Family Provider

Month Week Day 08/01/2020 - 08/31/2020 Current Month

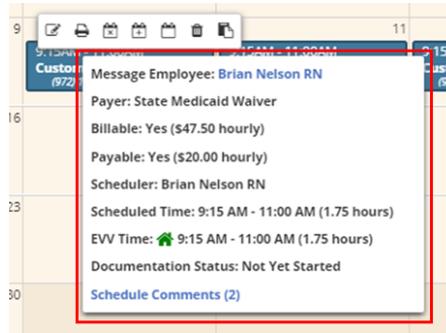
Tasks (29)	Status	Payment Source	Start Date/Time	End Date/Time	Assigned To	Hours (28.00)
Companion	Not Yet Due		Aug 30, 2020 07:00 AM	Aug 30, 2020 08:00 AM	Unassigned	1
Companion	Not Yet Due		Aug 29, 2020 07:00 AM	Aug 29, 2020 08:00 AM	Unassigned	1
Companion	Not Yet Due		Aug 28, 2020 07:00 AM	Aug 28, 2020 08:00 AM	Unassigned	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 Yvette and she said she needs to check her schedule and will call back tomorrow 6/11.	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.



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 Tasks view, a Menu Bar displays with the following:

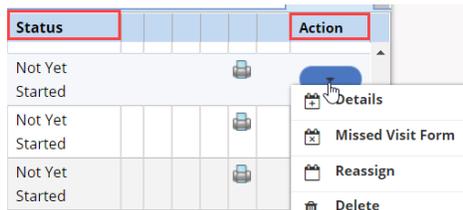
Task	A	Payment Source	Start Time	End Time	Employee	Status
OASIS-D1 Start of Care		Private(Self) Pay	07/26/20 6:00 AM	07/26/20 7:00 AM	Cj Pierson RN	Saved

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

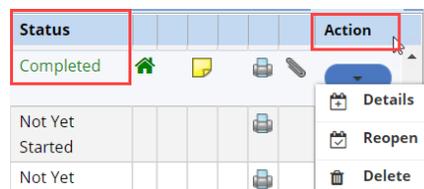
- Attachments - Presents when attachments are associated with the task. Selecting will present the attachment.



- 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/shift.
- Reassign - Ability to quickly reassign a task to another user.
- Delete - Removes the task.



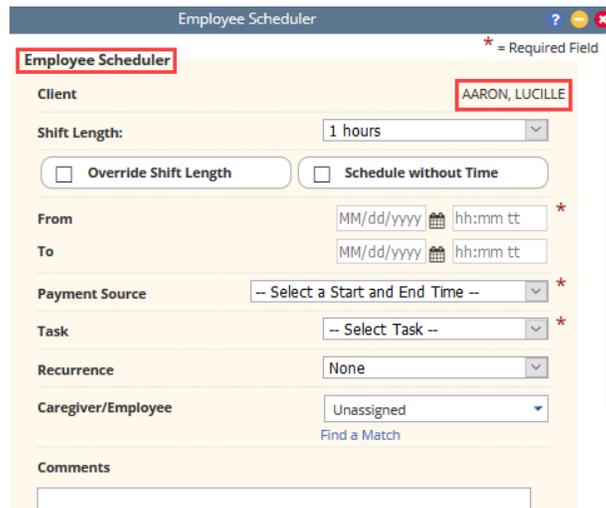
The Completed tasks, on the other hand, have fewer actions available. Details and Delete are the same actions, while Reopen will reopen the task. To hide the List Task view, select the **Hide List** view.

Unassigned Shifts	
Employee	Status
Tanaka	Not Yet

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.



The screenshot shows the 'Employee Scheduler' window with the following fields:

- Client:** AARON, LUCILLE
- 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:** Unassigned
- [Find a Match](#)
- Comments:** (empty text area)

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

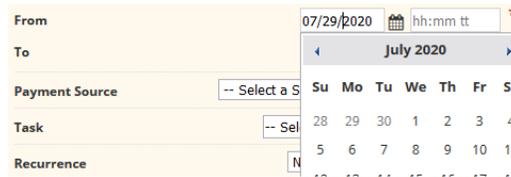
Shift Length - Includes three options: a drop-down selection which automatically calculates the 'To' time once the shift start time is entered; Override the Shift Length allows manual input of the shift in and out times.



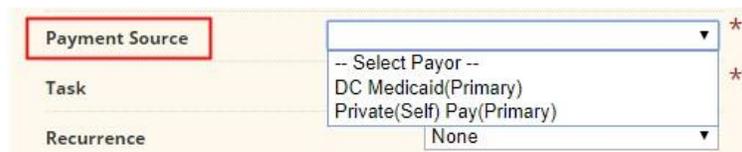
This close-up shows the 'Shift Length' field with a dropdown menu set to '1 hours'. Below it are two checkboxes: 'Override Shift Length' and 'Schedule without Time'.

From and To - Organizations will place the date of Service in the From and To areas. If the agency selects a Shift Length hour from the drop-down selection once they place the start time, it will automatically calculate the end time. If

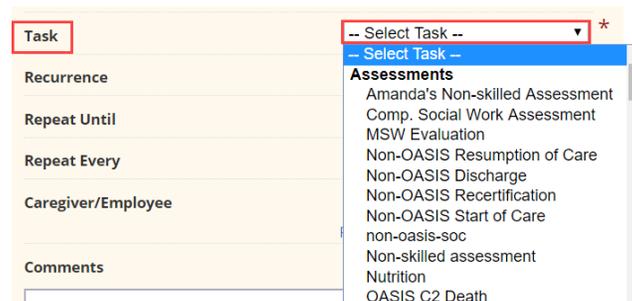
Override Shift Length is selected, then the organization will set their own start and end time. If the organization selects to Schedule without time, then the start and end time will disappear.



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.



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.



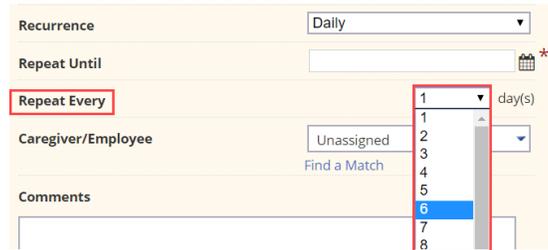
Recurrence - The recurrence feature enables the organization to easily schedule the same task out multiple times based on the client's specified need. If a recurrence schedule is used, the user must indicate an end date of the recurrence and for the daily/weekly options of how often the task repeats.



Recurrence Options:

None - No recurrence needed.

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



Recurrence: Daily

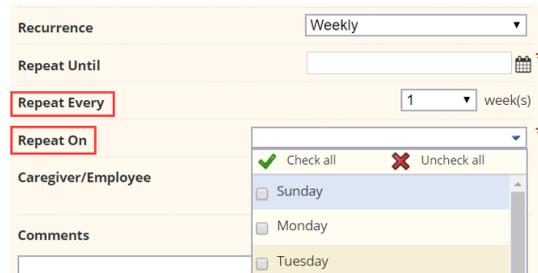
Repeat Until: [Calendar icon]

Repeat Every: 1 day(s)

Caregiver/Employee: Unassigned

Comments: [Text area]

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



Recurrence: Weekly

Repeat Until: [Calendar icon]

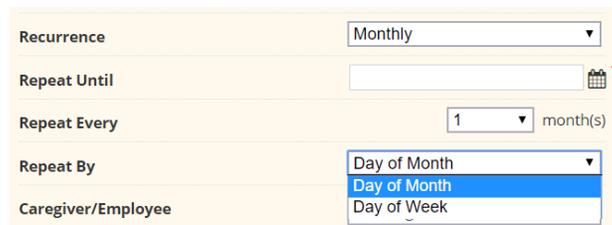
Repeat Every: 1 week(s)

Repeat On: [List of days: Sunday, Monday, Tuesday]

Caregiver/Employee: [Text area]

Comments: [Text area]

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



Recurrence: Monthly

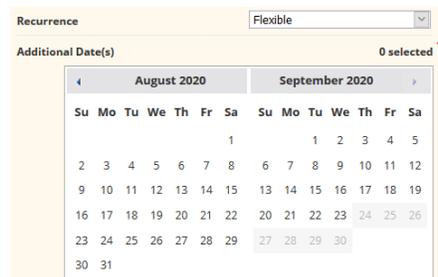
Repeat Until: [Calendar icon]

Repeat Every: 1 month(s)

Repeat By: Day of Month

Caregiver/Employee: [Text area]

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.



Recurrence: Flexible

Additional Date(s): 0 selected

August 2020							September 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
						1		1	2	3	4	5	
2	3	4	5	6	7	8	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28	29	30			
30	31												

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

Unassigned - If there no 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.

Task Information			
Client	NEWTON, HEATHER	Is all day	No
Payer	-- Select a Start and End Time --	From	07/29/2020 12:00 AM
Task		To	07/29/2020 12:00 AM

Matching Options			
Required Caregiver Criteria			<input checked="" type="checkbox"/> Deselect All
<input checked="" type="checkbox"/> License/Certifications	<input checked="" type="checkbox"/> Skills	<input checked="" type="checkbox"/> Transfers	
<input checked="" type="checkbox"/> Personality Traits	<input checked="" type="checkbox"/> Pets	<input checked="" type="checkbox"/> General	
Preferred Caregiver Criteria			<input checked="" type="checkbox"/> Deselect All
<input checked="" type="checkbox"/> License/Certifications	<input checked="" type="checkbox"/> Skills	<input checked="" type="checkbox"/> Transfers	
<input checked="" type="checkbox"/> Personality Traits	<input checked="" type="checkbox"/> Pets	<input checked="" type="checkbox"/> General	
<input type="radio"/> Full Availability	<input type="radio"/> Any Availability		
<input type="checkbox"/> Is Oriented			

Comments & 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 agency chooses, they can **Save & Add Another** task for the client.

Agency Schedule

The Agency Schedule shows all visits scheduled to employees of the organization at a glance. The functionality is similar to the Schedule Center, but instead of searching for clients individually, they are all shown in the grid.

Agency Schedule

-- All Branches --

Jul 19 - 25, 2020 Today Daily Weekly Print Refresh Client Employee

Clients	Hours	Sun, Jul 19	Mon, Jul 20	Tue, Jul 21	Wed, Jul 22	Thu, Jul 23	Fri, Jul 24	Sat, Jul 25
				7p - 8p Companion Poseria, Cullie RN	7p - 8p Companion Poseria, Cullie RN	7p - 8p Companion Poseria, Cullie RN	7p - 8p Companion Poseria, Cullie RN	7p - 8p Companion Poseria, Cullie RN
ADAM, BILDAD	18.00		Skilled Nurse Test Jordyn RN Homemaker HHA visit Moore, Keshia RN	12p - 4p Custom Visit - Mobile Krauss, Shane RN	12p - 4p Custom Visit - Mobile Krauss, Shane RN		12p - 4p Custom Visit - Mobile Krauss, Shane RN	12p - 4p Custom Visit - Mobile Krauss, Shane RN
ADAM, MARCIE	2.00				12a - 1a Anusha HHA Custom visit Moore, Keshia RN	4p - 5p Anusha HHA Custom visit Sabath, Sonya RN		
ADAMS, ANDY	0							
ADAMS, MARCIE	0							
ADAMSSS, TOM	0							
ADDISON, MEDICAL	1.00		1a - 2a Custom Visit Nguyen, Tim RN					

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

All (295.42 Hours)
Total (291.42 Hours)
Scheduled (209.17 Hours)
Completed (74.25 Hours)
Missed (4.00 Hours)
Unassigned (8.00 Hours)

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  icon. Refresh the page by selecting the  icon. The schedule defaults to viewing all clients but can be changed to users by selecting the **Employee** button.

-- All Branches --

Jul 19 - 25, 2020 Today Daily Weekly Print Refresh Client Employee

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 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

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

All (122.00 Hours)
Total (113.00 Hours)
Scheduled (41.00 Hours)
Completed (61.00 Hours)
Missed (9.00 Hours)
Unassigned (11.00 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
▼ Active								
ABBOT, MATT	50.67 		7:02a - 12:02p Custom Visit - Mobile ABRAMS, JUANITA	7a - 12p Custom Visit - Mobile ABRAMS, JUANITA	12p - 12:45p Custom Visit - Mobile ABRAMS, JUANITA	7a - 12p Custom Visit - Mobile ABRAMS, JUANITA	7a - 12p Custom Visit - Mobile ABRAMS, JUANITA	7a - 12p Custom Visit - Mobile ABRAMS, JUANITA
			3p - 7p Custom Visit - Mobile ABRAMS, JUANITA	3p - 7p Custom Visit - Mobile ABRAMS, JUANITA	12:05p - 12:45p Custom Visit - Mobile ABRAMS, JUANITA	3p - 7p Custom Visit - Mobile ABRAMS, JUANITA	3p - 7p Custom Visit - Mobile ABRAMS, JUANITA	3p - 7p Custom Visit - Mobile ABRAMS, JUANITA
ABUARJA, LAMEEC	0							
ACEVEDO, ROSA	0							
ADAMS, STACIE	0							
ADEFUYE, TOSIN	0							
ADEYEMI, MALIK	0							
ADVOCATE, CLIENT	0							

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

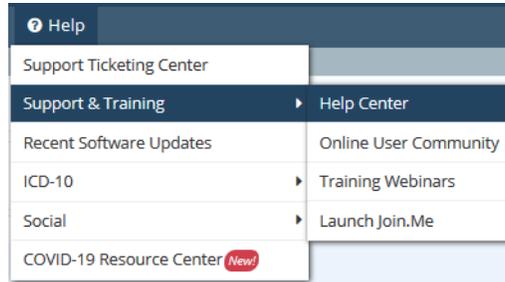
All (284.42 Hours)
Total (280.42 Hours)
Scheduled (208.17 Hours)
Completed (72.25 Hours)
Missed (4.00 Hours)
 Estimated Overtime (20.67 Hours)

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 Hours 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 agency schedule filters is the Estimated Overtime filter.

HELP CENTER

Help/Support & Training/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/>



Get Help Anytime, Anywhere!

