HOME CARE OFFICE STAFF (INTAKE AND SCHEDULING) TRAINING MANUAL

August 2020

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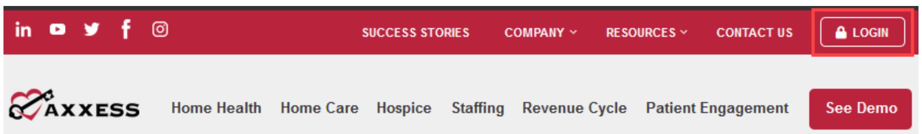
LOGGING IN TO AXXESS

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.



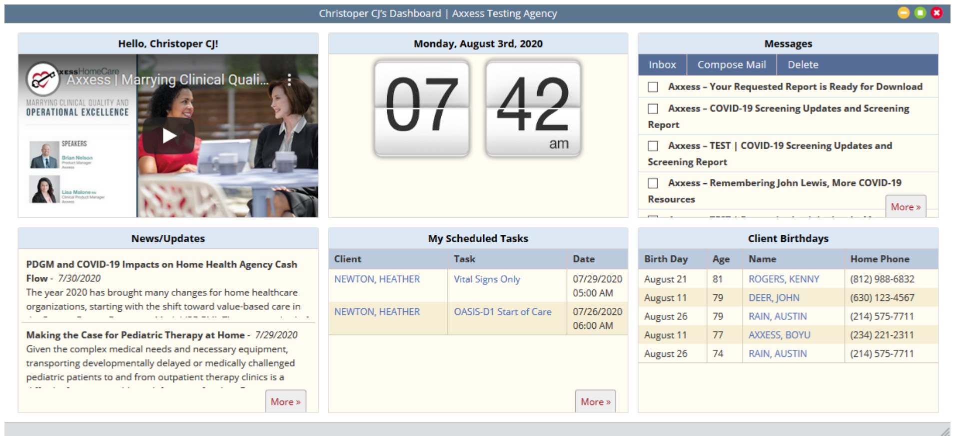
The sign-in page will appear where the username and password fields are required. The username is the email address associated with the Axxess Home Care user account. Once the username and password have been entered, select **Secure Login** to enter Axxess' software.

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

DASHBOARD



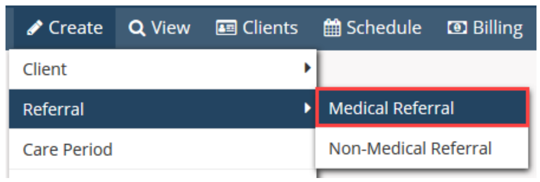
The dashboard can display six tiles. Three of these tiles are default and, the remaining three will be based on user permissions.

- <u>Welcome Panel</u> - 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.
- <u>Local</u> - This box will display the current date and time for the current location.
- <u>Messages</u> - 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.
- <u>News/Updates</u> - Links to Axxess generated blog posts, educational articles, regulatory updates, and other important information.
- <u>My Scheduled Tasks</u> - Electronic "To-Do" list. Quickly access a client chart and tasks. The tile will display the five most recent clients and their tasks.
- <u>Client Birthdays</u> - 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

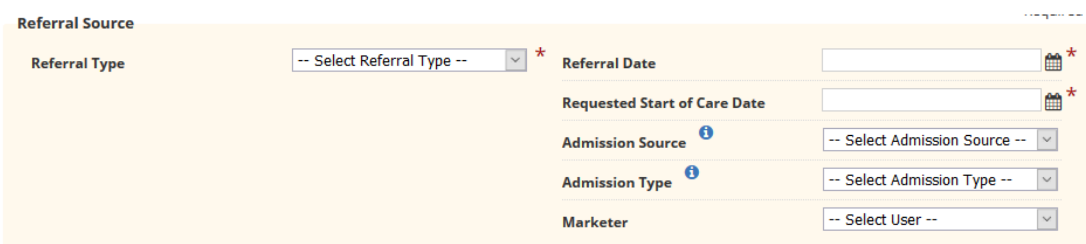
Create/Referral/Medical Referral

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.



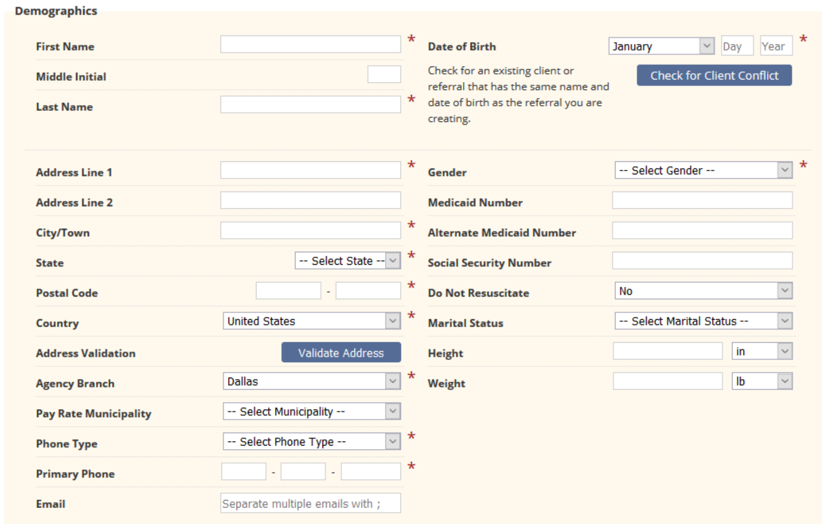
The referral entry details page will populate. Sections with a red asterisk* indicate that the information is required to save the page.

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.

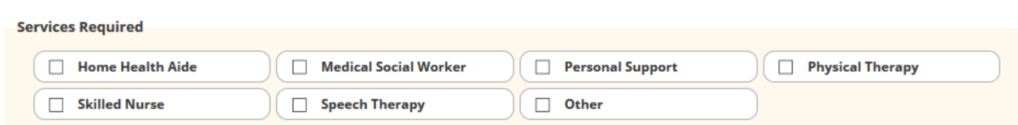
Demographics - This section contains geographical and contact details pertaining to the client.



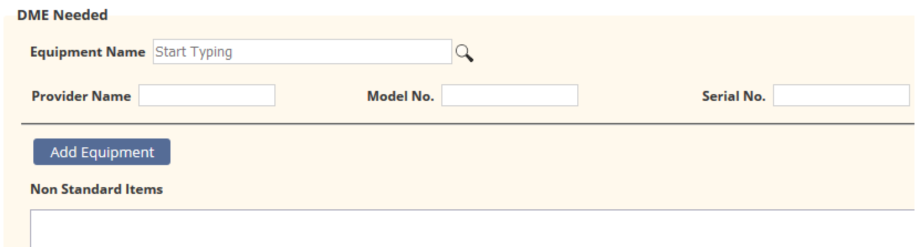
Required items in the Demographics section include:

- 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.



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



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.

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

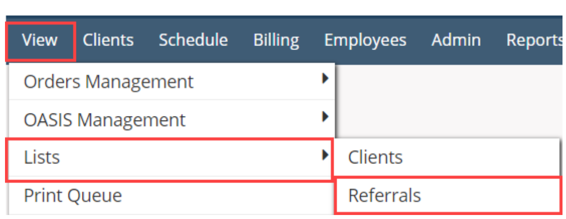
Comments - Enter free text comments or use the **Load Template** for pre-determined options.

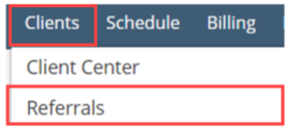
Then, select the **Save** button to place the client in the Pending Admission status.

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 List | Axxess Testing Agency

Branch: Dallas | Client Type: All | Filter by Text: Start Typing

New Referral | Excel Export | Refresh

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**	☒Female ☐Male
Address Line 2		**Marital Status**	0
District	N/A	**City, State, Postal Code**	RICHARDSON, TX 75081

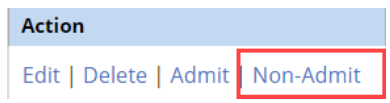
The Action column contains four options for the client's referral:

- **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.

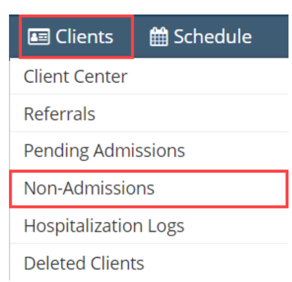
NON-ADMITTING A REFERRAL

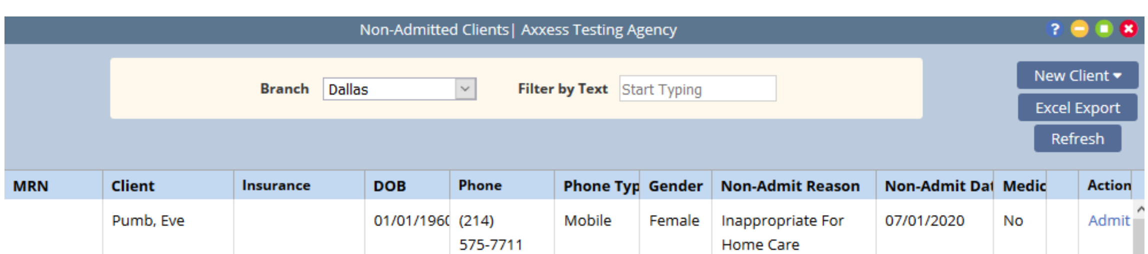
To Non-Admit a client, the option must be selected in the Actions column in the Referral List.



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.

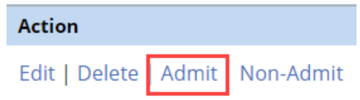
Once the Non-Admission is processed, the list of Non-Admitted clients can be found in *Clients/Non-Admissions.*





ADMITTING A REFERRAL

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

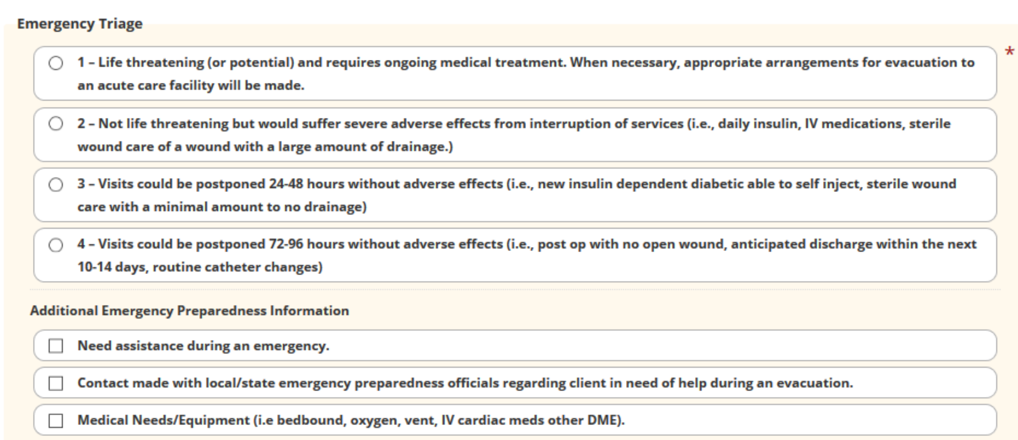


The Demographics section will contain all the information entered during the referral process. Below are sections that were not in the referral process that are required to admit the client:

- Record Number - This is an organization created Medical Record Number. This is required before admitting the client.

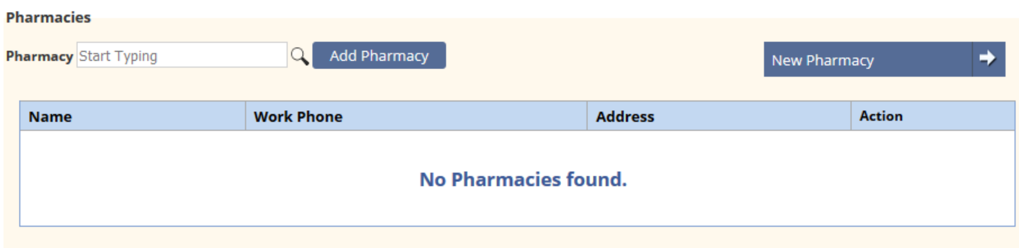
- Case Manager - The individual who will be overseeing the client's case.
- Assign to Clinician - The Clinician/Case Manager that the Initial Care Period and/or Face To Face will be assigned to.

- 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.

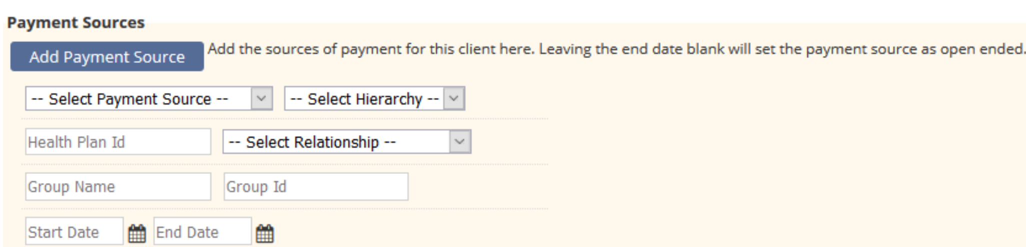


The following options are sections that were not available when entering the referral:

- 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).

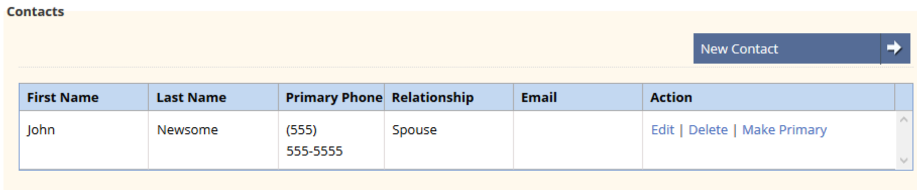


- Payment Sources - Encompasses details of how the client will be billed. It is not required at initial client intake; however, it is beneficial to input as soon as it is obtained.
  - Select **Add Payment Source** to add multiple payer sources. Choose Payment Source, Hierarchy and Relationship. Then enter Health Plan ID, Group Name, Group ID, Start and End Date (if applicable).

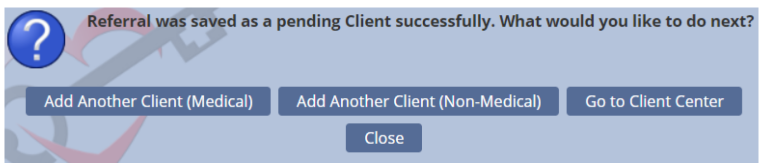


- Evacuation - This section is applied to clients that live in areas that require evacuation necessities. This is based upon the organization's policy and procedures. Choose the Evacuation Zone and enter the address/phone numbers. If Evacuation Address is the same as Emergency Contact, select the checkbox. Emergency Contact must be previously entered otherwise, it will be grayed out.
- Emergency Preparedness Comments - Enter comments related to Emergency Preparedness or select **Load Template** for pre-determined options.

- Contacts - All previously entered contacts will show here. Select the **Edit** or **Delete** hyperlinks to make updates. Select the **Make Primary** hyperlink to make any contact the primary. Select **New Contact** to add additional.
  - First Name, Last Name, Relation to Referral and Primary Phone are required. Enter any other information available then select **Add**.

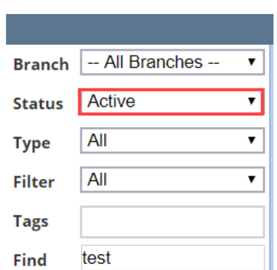


Selecting **Save** instead of **Admit** will generate a message with further options for proceeding.



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

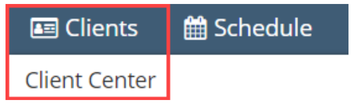
Selecting **Admit** will move the client in to the Client Center with an Active status.



INTRODUCTION TO CLIENT CENTER

Clients/Clients Center

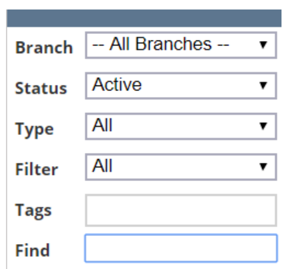
The Client Center is the client's electronic medical record.



Client Center Filters

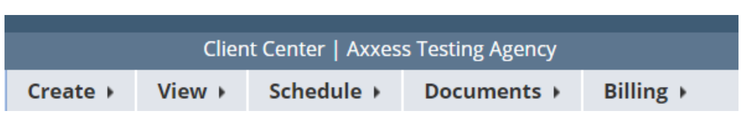
On the left-hand side of the Client Center window, there are parameters available to further narrow the selection when searching for a client.

- 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.



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.

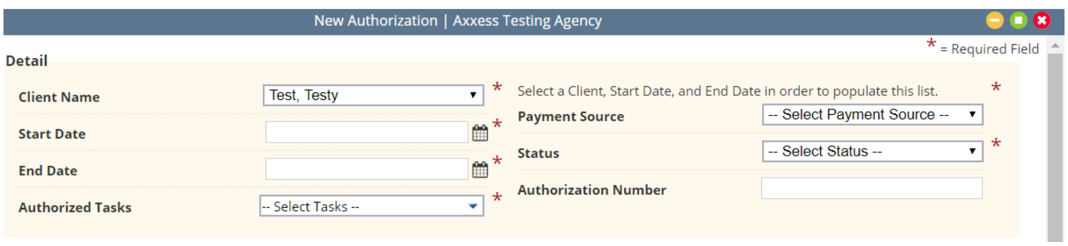


Create Tab

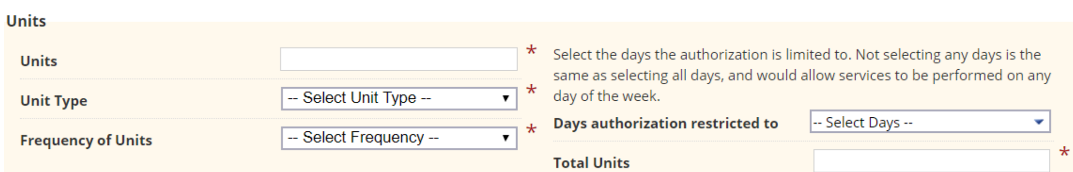
Order - This button provides the option to add a new order to the client’s chart. An alternative route is *Create/Order*.

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.



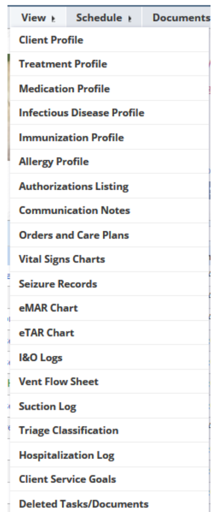
The Payment Source list pulls from the details indicated in the client’s chart. The list will not generate until the Start/End dates are entered. The Status of the authorization can be indicated by selecting the options provided. Once the top section is completed, the Units section must be addressed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

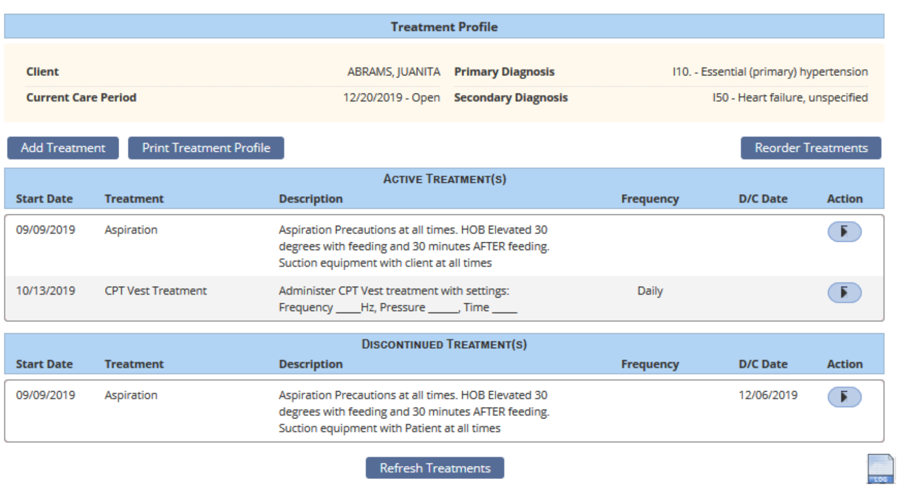
View Tab

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

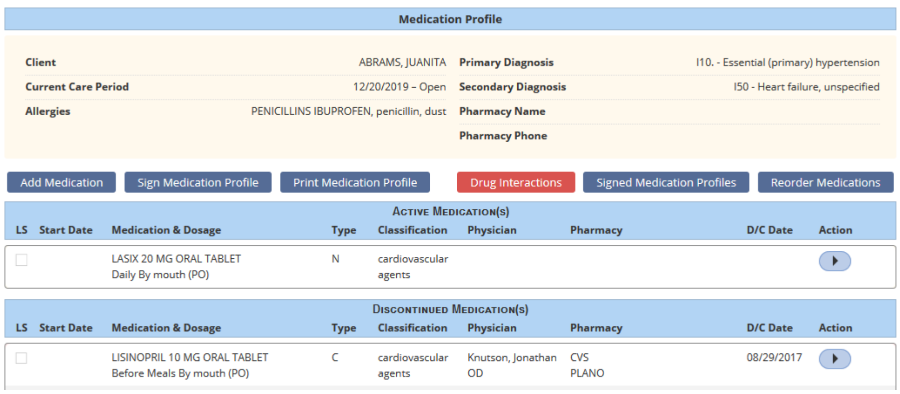


Client Profile - This section is the client's Client Profile Data Sheet. It is a PDF Synopsis of the client's profile. Upon viewing, the profile may be Downloaded, Printed, or Closed.

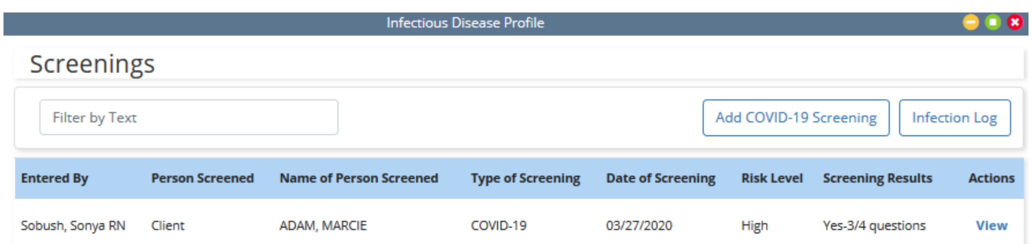
Treatment Profile - The Treatment Profile houses all treatments the client is receiving. The list is split into Active and Discontinued Treatment(s). Add, print, refresh or reorder treatments by selecting the corresponding buttons. Additional options are available under the Action column button.



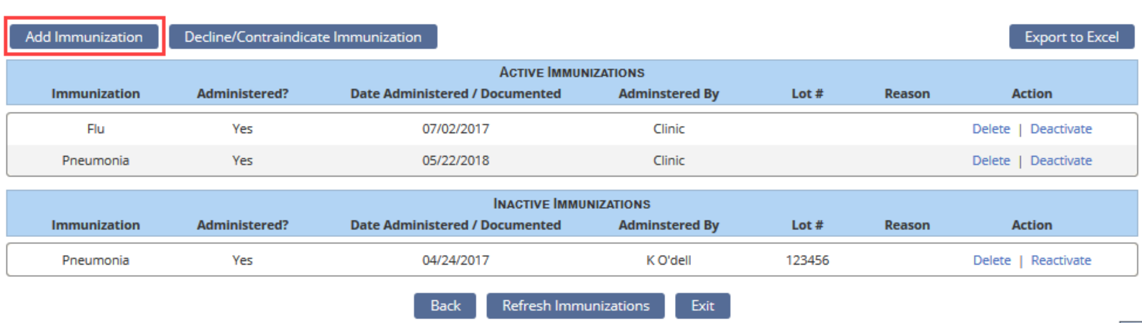
Medication Profile - This section contains details of the client's Medication Profile. Client medications are separated into Active and Discontinued Medications. Users can Add, **Discontinue**, **Activate** medications, **Sign Medication Profile**, **Print Medication Profile**, **Check Interactions**, view **Signed Medication Profiles**, and **Reorder Medications**.



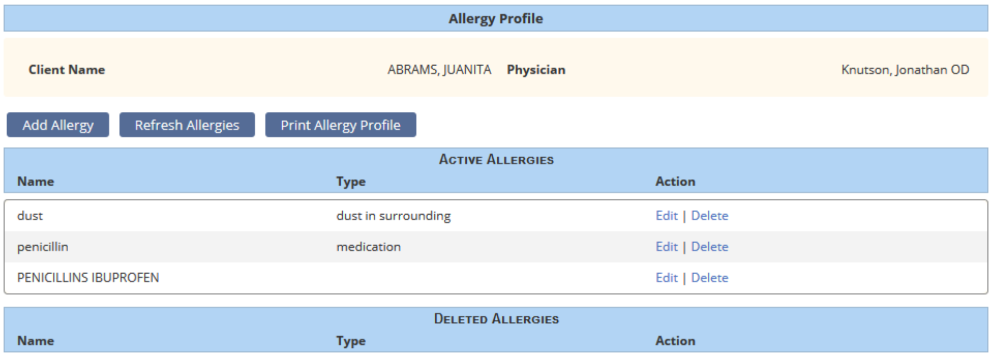
Infectious Disease Profile - The Infectious Disease Profile is designed to help organizations easily track infectious diseases and screening tools used to detect them. Create a new screening by selecting the **Add COVID-19 Screening** button or **View** by selecting the hyperlink.



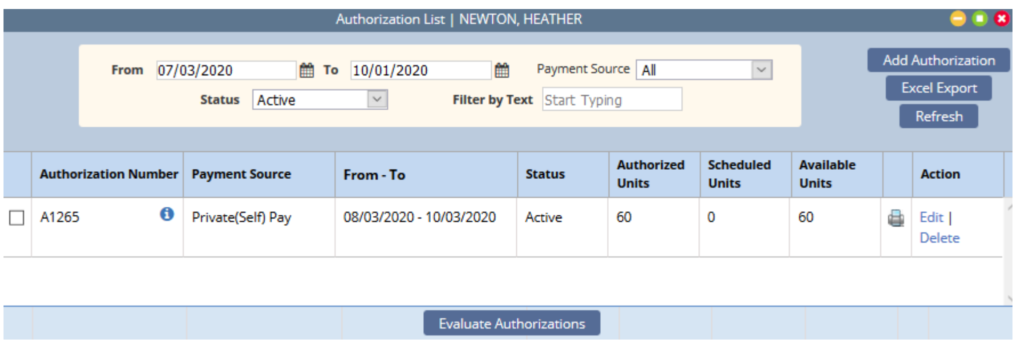
Immunization Profile - This section contains a list of all immunizations. Add, Deactivate, Decline or Delete the list of immunizations.



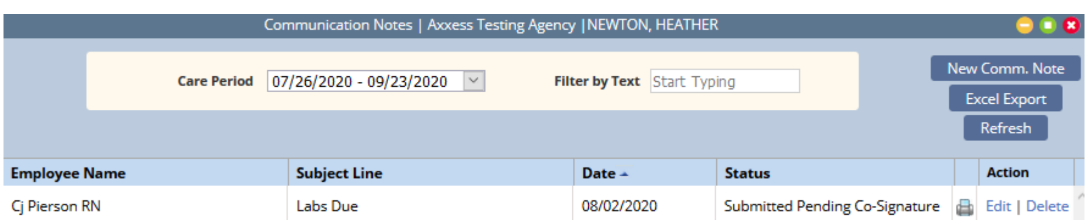
Allergy Profile - This section contains a list of all client allergies. Add, **Edit**, **Delete** and print the list of allergies.



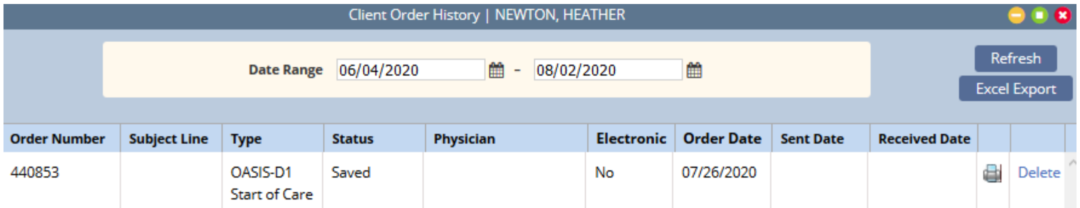
Authorizations Listing - Enables users to search/view/edit existing authorizations as well as add new authorizations as needed. Actions include the ability to view/print, **Edit**, evaluate and **Delete** existing authorizations as well as add new authorizations.



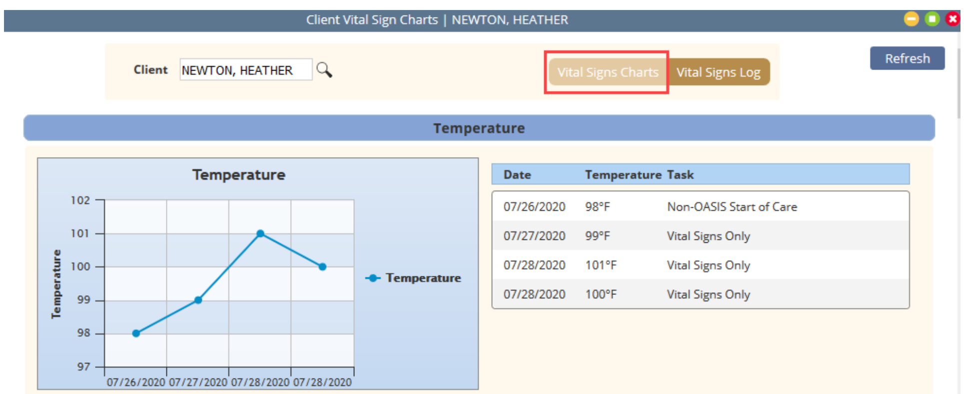
Communication Notes - Enables users to view existing Communication Notes as well as add new notes as needed (**New Comm. Note**). Users may search by care period and further filter by text. Existing communication notes will display in the grid. Actions include the ability to **Edit**, **Delete** and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



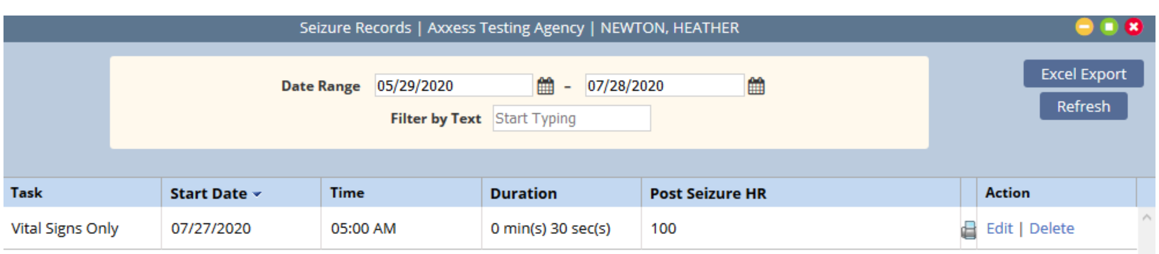
Orders and Care Plans - Enables users to view existing Orders and Care Plans. Users may search by care period and further filter by text. Actions (permission-based) include the ability to view/print and **Delete**. The list of Orders and Care Plans may be exported to Excel.



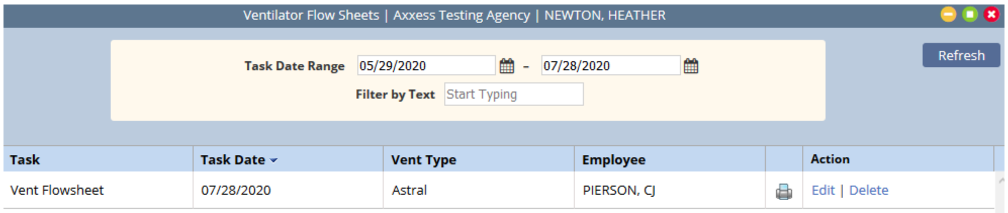
Vital Signs Chart - Displays the client's most recent seven visits and the vitals entered during those visits. Vitals may be viewed in graph format as well. The Vital Sign Log contains Temperature, Weight, Respiratory Rate, Pain Level, Pulse, Blood Sugar, Blood Pressure, and an overall Report with all Vital Signs during the period.



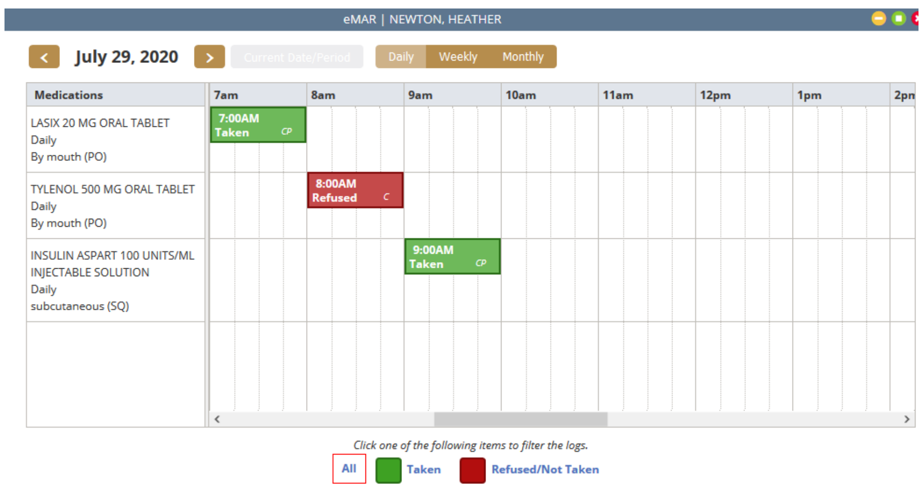
Seizure Records - Displays a list of existing Seizure Records. The list may be searched by date range and further filtered by text. Individual record details may be viewed/printed via the printer icon, and the entire list may be exported to excel. Available actions include the ability to **Edit** and/or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



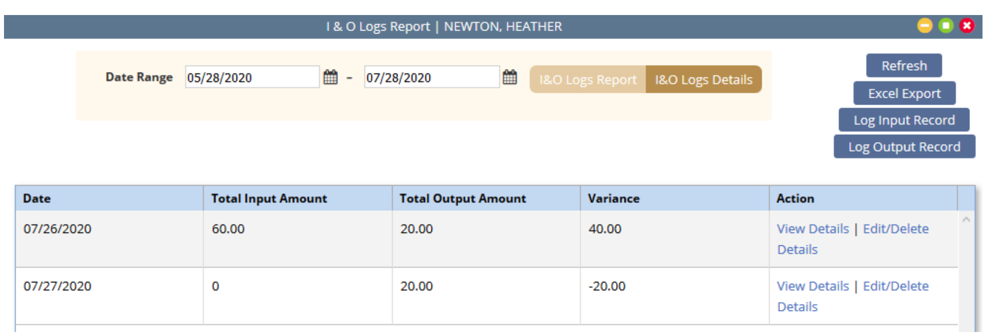
Vent Flow Sheet - Displays all recorded Ventilator Flow Sheets. Filter, print, **Edit** and/or **Delete** the flow sheets as needed.



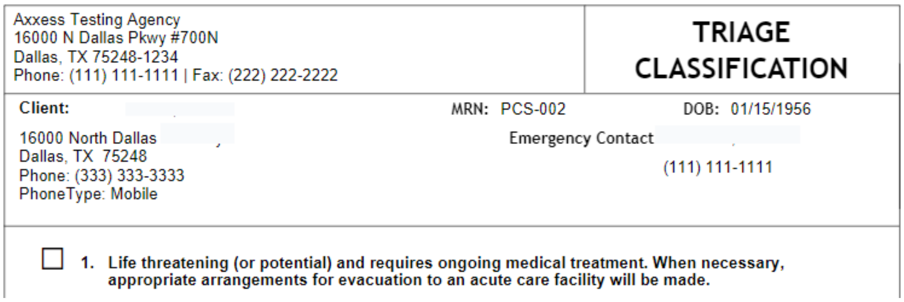
eMAR Chart - (Medical Admissions only) Enables users to view the client's medication administration record. Display options include Daily, Weekly, or Monthly views. Client Medications are listed in the left column, and the administration log displays green for taken meds and red for refused.



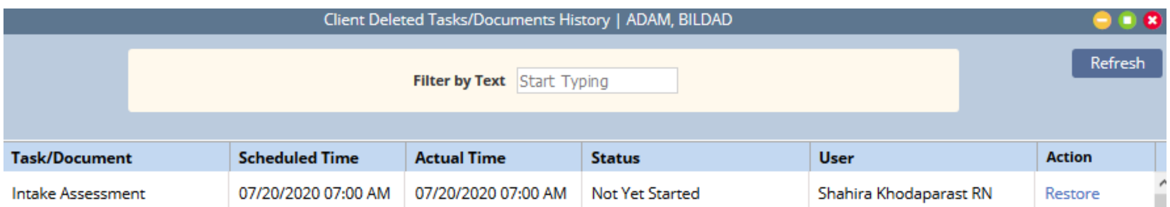
I&O Logs - (Medical Admissions only) Enables users to search and view recorded input and output values for the client. The default shows the summary, but users may view details by selecting the details link or toggle. Additional actions include the ability to **Edit/Delete Details** recorded values (permission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



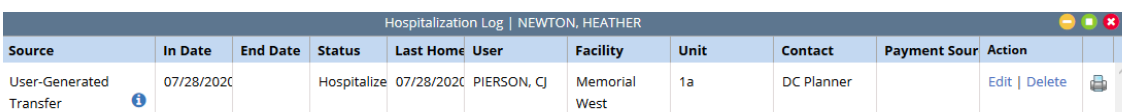
Triage Classification - This section contains information based on answers from client's profile Emergency Preparedness section.



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.

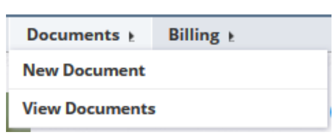


Hospitalization Log - Displays a list of the client hospitalizations. Edit, delete or print the individual log entries.



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

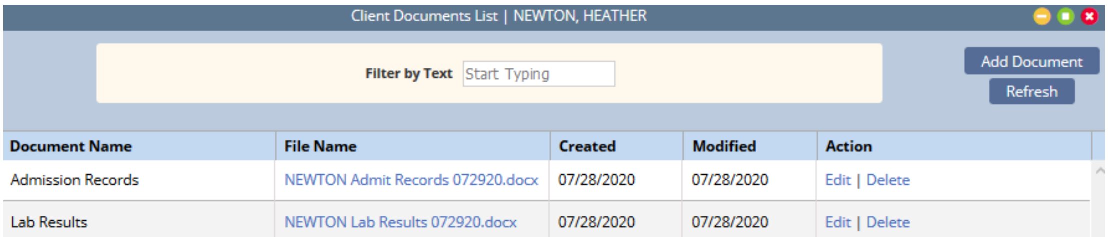
Documents Tab - The **Documents** Menu has two options available to select:



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.



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:

- 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: Ardeshna, 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:

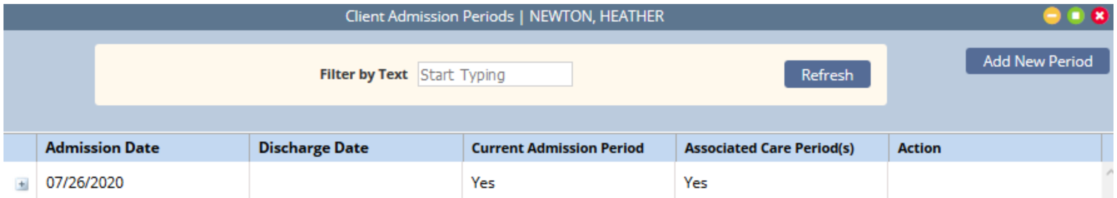
[Edit] [More] [Directions] [Admissions]

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.

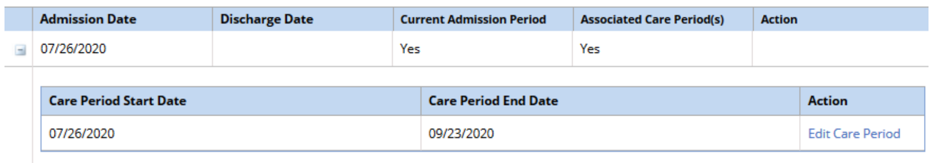
MRN
Name
Gender
Address Line 1
Address Line 2
City
State, Zip
Primary Phone
Secondary Phone
Start of Care Date
Date of Birth
Physician Name
Physician Phone
Physician Fax
Emergency Name
Emergency Phone
DNR

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.

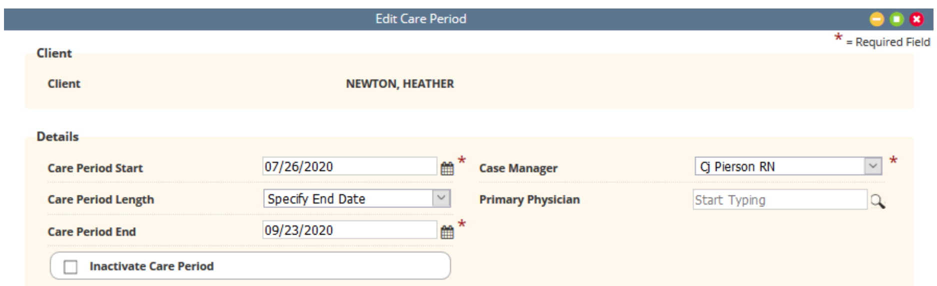
Admissions - If the client was discharged and readmitted, the admission periods will be listed in this window.



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



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



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

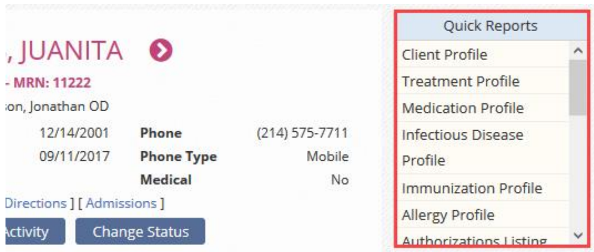
Blue Action Buttons

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.

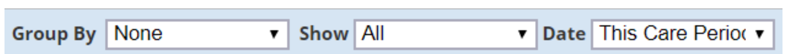
Client Center Quick Reports

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.



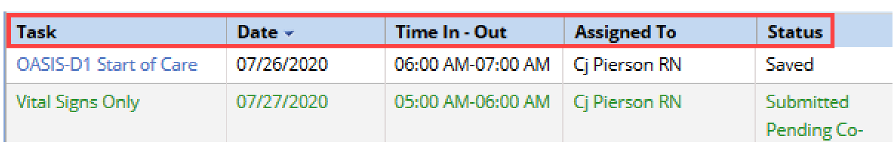
Client Center Tasks

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 - 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.

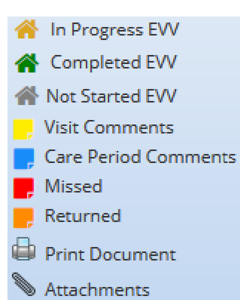
Date, Time In-Out, and Assigned To - The date and time are set to the scheduled date and time until the note is completed. It then displays the actual date and time of the task. The employee scheduled for the task will be displayed next.

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.

<u>Electronic Visit Verification</u> - 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.

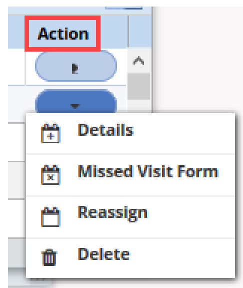
<u>Sticky Notes</u> - Yellow sticky notes show notes for a particular task, blue shows notes related to the whole care period, red shows missed visit notes and orange shows notes that are returned for review.



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.



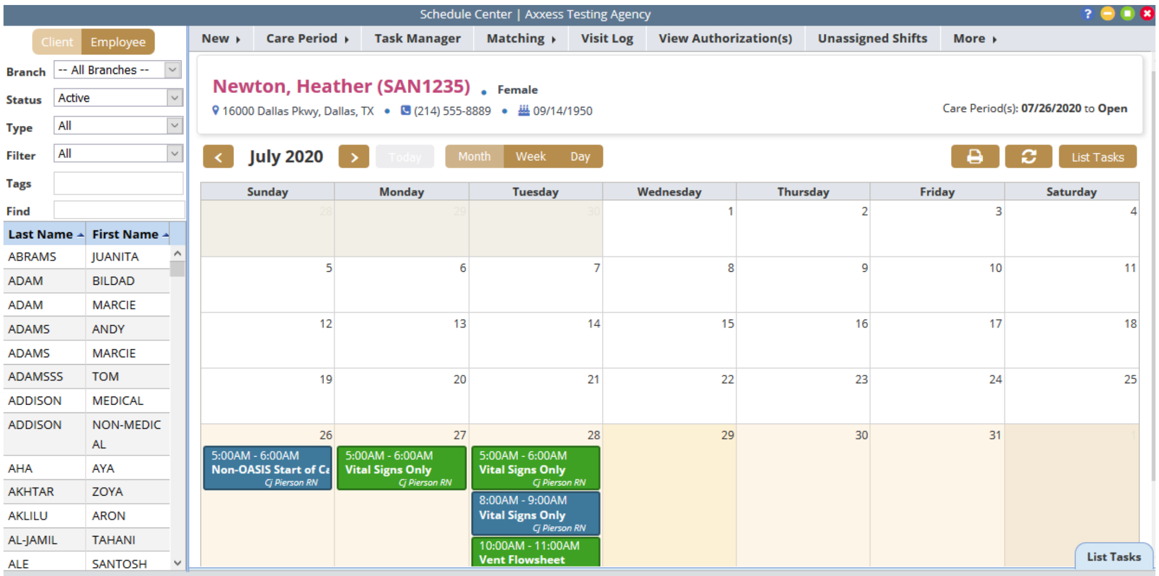
- **Details** - Provides information related to the task. Certain fields are available for editing based on the note status and may include: Document Name, Time in-out, Payer, Status, Employee, Surcharge/Mileage, Update Bill/Pay, Add Task (yellow) sticky note, add Supplies as well as the ability to upload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

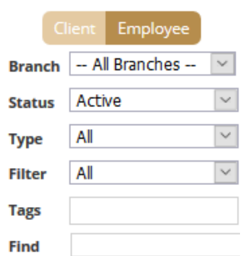
INTRODUCTION TO THE SCHEDULE CENTER

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



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.



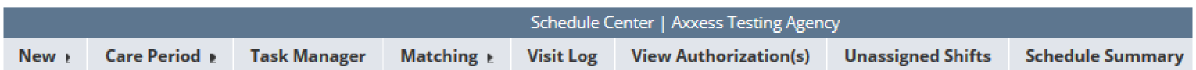
- <u>Branch</u> - Default is all branches. User's that have multiple branch access under the same organization may limit the client/employee search by selecting an individual branch location.
- <u>Status</u> - The Client or Employee's current status level.
  - Client: The default status is Active but may be filtered to view Discharge, Pending, Hospitalized, Non-Admit.
  - Employee: Active, Inactive, Terminated.
- <u>Type</u> - Distinguishes the type of employee or client.
  - Client: Medical, Non-Medical or All (default).

- Employee: System, Non-System or All (default).

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

Schedule Center Top Menu

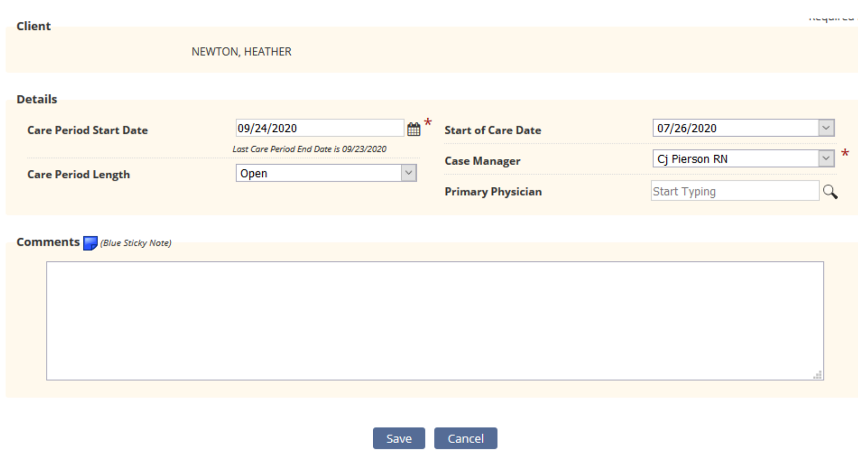
The **Schedule Center** has a list of menus that will assist with preparing and managing the client's schedule.



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

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

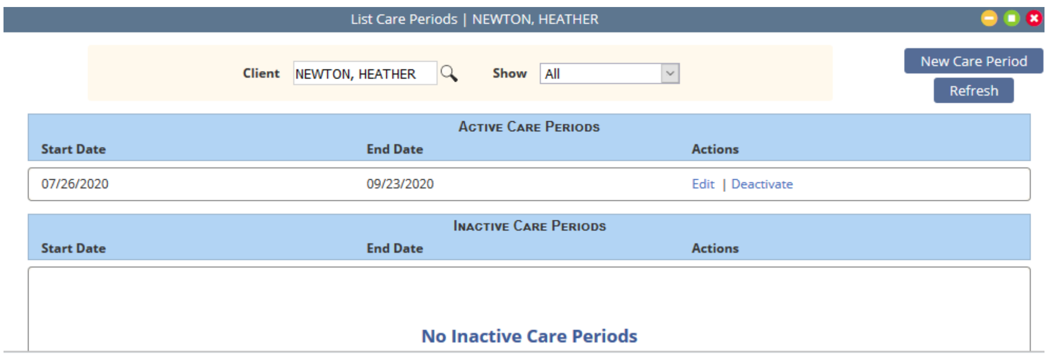
New Care Period - The following information will be available to complete:



- <u>Care Period Start Date</u> - Date the Care Period Starts.
- <u>Care Period Length</u> - 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.
- <u>Start of Care</u> - Pulls from the client file.

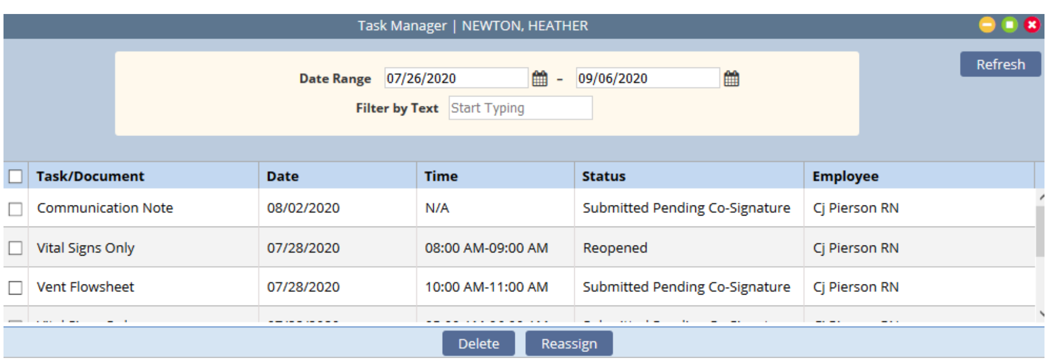
- Case Manager - Indicates who will be Case Manager.
- Primary Physician - Pulls from the client file.
- Comments - Comments entered here pull to the blue sticky notes which are viewable from the task list.

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



- 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.

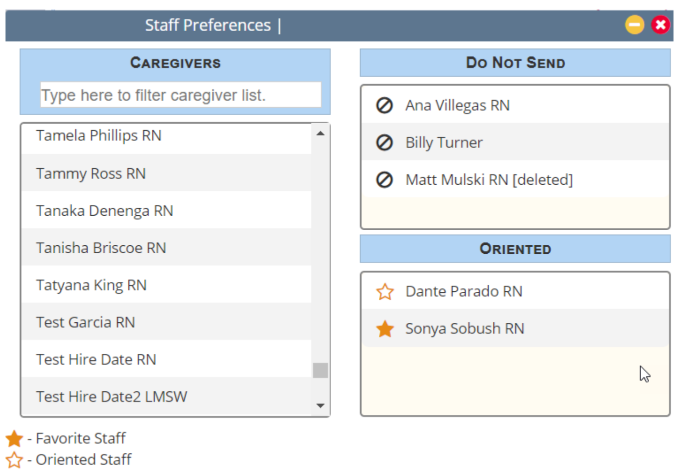


Tasks that have been Started or Completed cannot be reassigned.

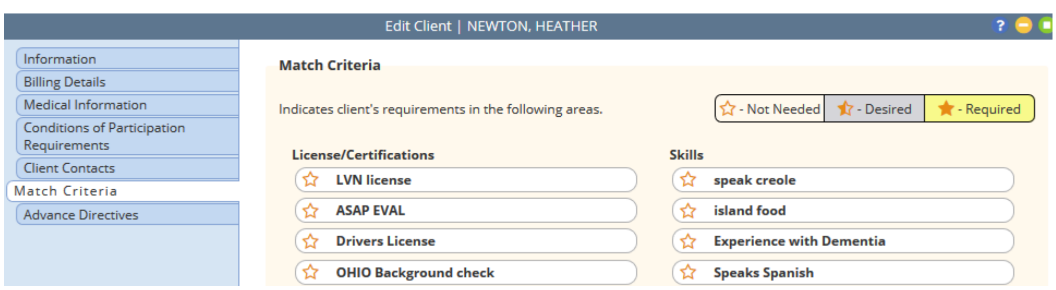
Matching - This tab has two submenus: **Preferences** and **Match Criteria**.

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.

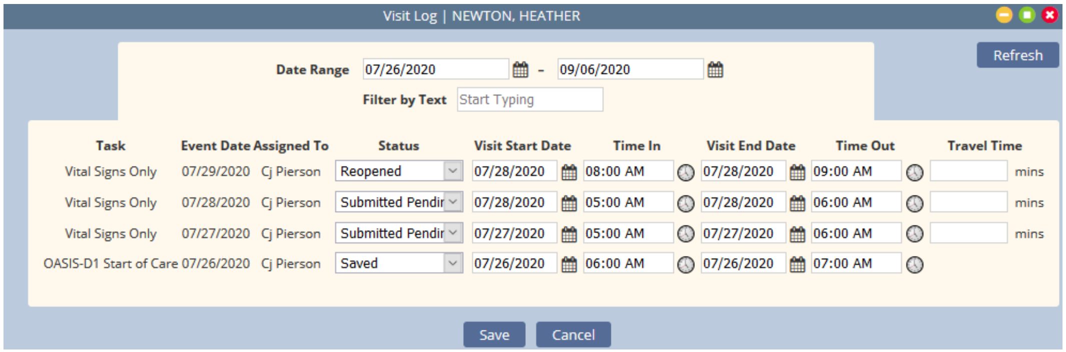


Match Criteria - Takes the user to the client's match criteria in their client file. From here, the client's criteria may be viewed or updated. The Matching list is created by the organization and is taken into consideration when using the matching functionality during the scheduling process.

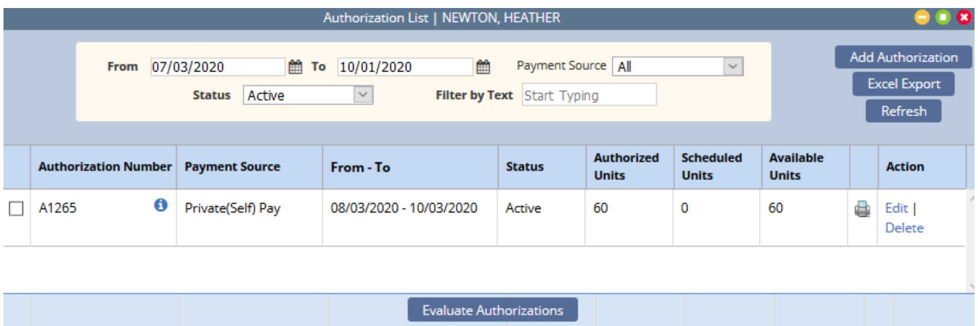


Visit Log - This option provides the ability to update specific information for billable tasks. This is particularly useful for updating non-system user information.

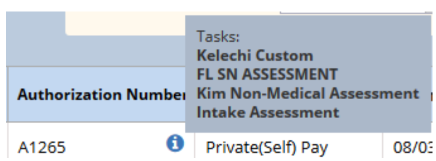
Task status, start and end dates, time in/out as well as travel time logging may all be updated from this menu.



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

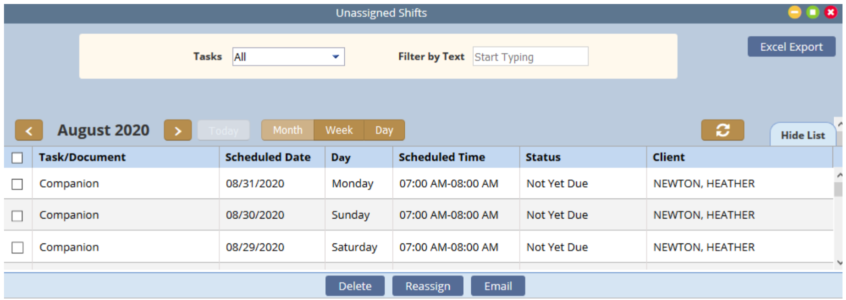


Hovering over the ℹ will indicate the Tasks assigned to the authorization.



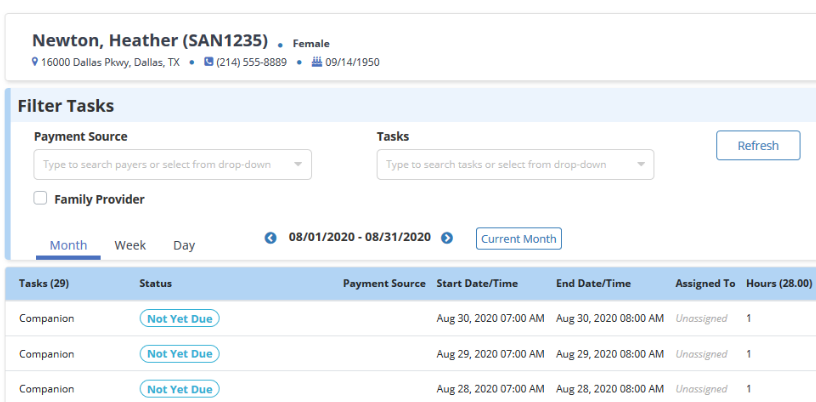
The ability to evaluate the authorization is available at the bottom of the window by selecting the **Evaluate Authorizations** button.

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



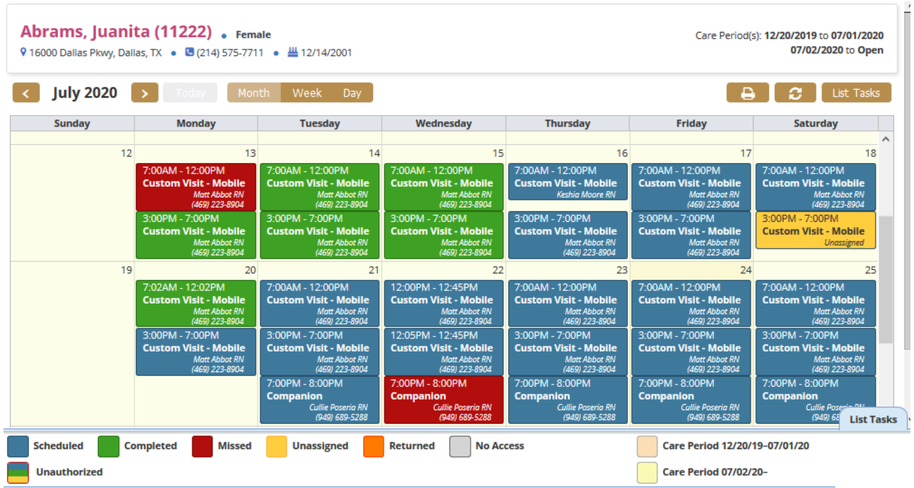
Schedule Summary - Enables users to see each client's scheduled hours at a summary level for at-a-glance review and identification of scheduling issues. The summary can be filtered by Payment Source, Tasks and Family Provider. Tasks can be viewed by Month, Week or Day. The list of tasks will display 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.

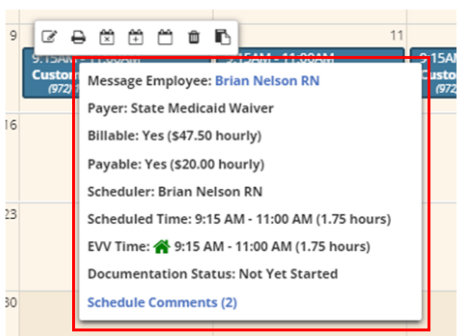


Client's Calendar View

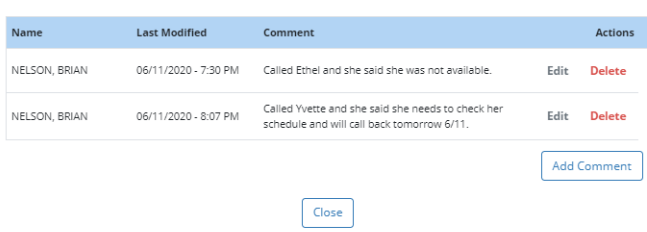
Once a client is selected, the calendar will display:



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.

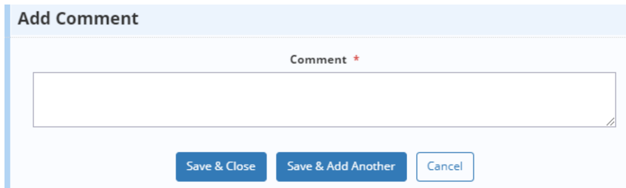


Schedule Comments - Users can view, add, edit and delete schedule comments by selecting **Schedule Comments** from the Quick Details menu or from the **Actions** column when viewing the Schedule Center in list view.

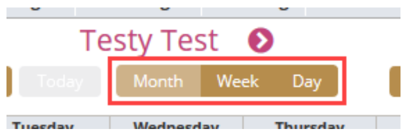


Name	Last Modified	Comment	Actions	
NELSON, BRIAN	06/11/2020 - 7:30 PM	Called Ethel and she said she was not available.	Edit	Delete
NELSON, BRIAN	06/11/2020 - 8:07 PM	Called Yvette and she said she needs to check her schedule and will call back tomorrow 6/11.	Edit	Delete

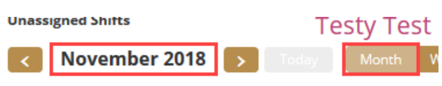
Select the **Edit** hyperlink under the Actions column to make updates or select the **Delete** hyperlink to remove the comment. To add a new schedule comment, select the **Add Comment** button. Enter the comment and select **Save & Close** to save the comment or **Save & Add Another** to continue adding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

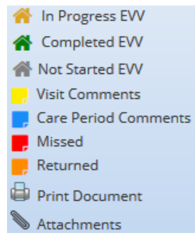
Selecting **List Tasks** displays the client schedule in list format. The List Task button is also available at the bottom right-hand side of the page.

Above the List Tasks view, a Menu Bar displays with the following:

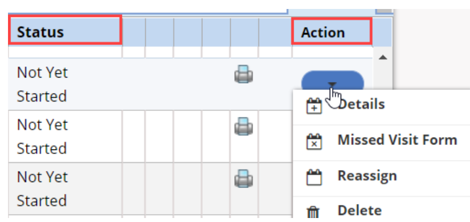
Task	A	Payment Source	Start Time	End Time	Employee	Status
OASIS-D1 Start of Care		Private(Self) Pay	07/26/20 6:00 AM	07/26/20 7:00 AM	Cj Pierson RN	Saved

- 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.

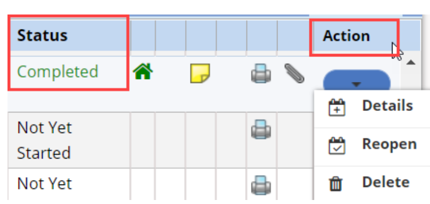
- ○ Attachments - Presents when attachments are associated with the task. Selecting will present the attachment.



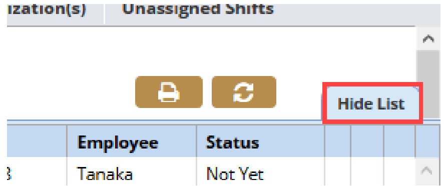
- Action Column - The options in this column are permission-based and contingent on the status of the task. Tasks that have not yet been completed may have the following options associated:



  - ○ 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.



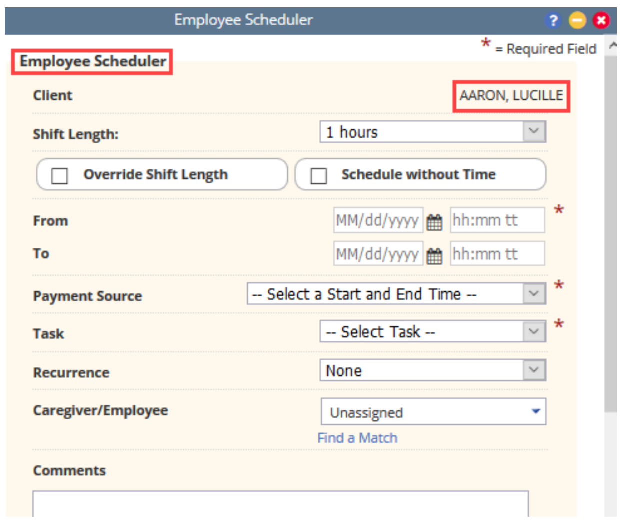
The Completed tasks, on the other hand, have fewer actions available. Details and Delete are the same actions, while Reopen will reopen the task. To hide the List Task view, select the **Hide List** view.



Scheduling Visits to a Client

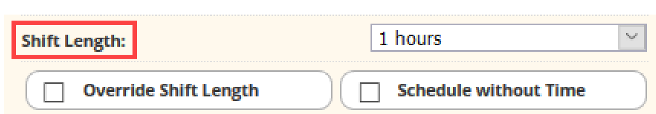
There are two ways to schedule a task: One way is by selecting the calendar day or by selecting *New/Client Task.*

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.



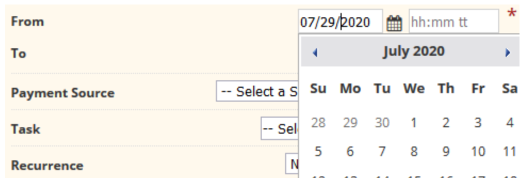
The following are further details for the Employee Scheduler, each piece and what it allows the organization for scheduling purposes:

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.

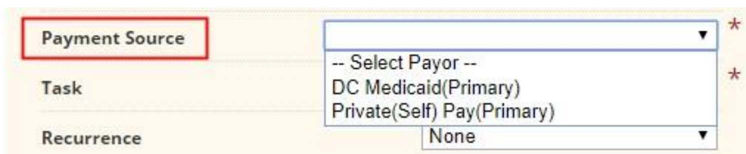


From and To - Organizations will place the date of Service in the From and To areas. If the agency selects a Shift Length hour from the drop-down selection once they place the start time, it will automatically calculate the end time. If

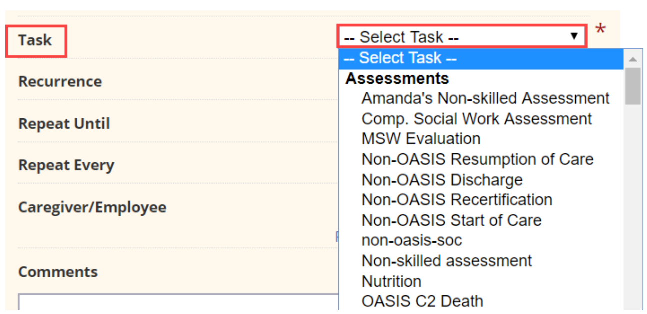
Override Shift Length is selected, then the organization will set their own start and end time. If the organization selects to Schedule without time, then the start and end time will disappear.



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.

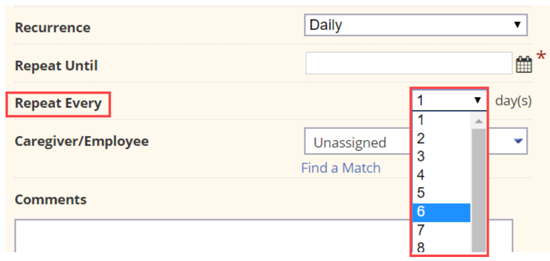


Task - Select the task being scheduled. The task list is ordered by category and may contain the following based on the types of documents the organization has created: Assessments, Visit Notes, Care Plans, Orders, Coordination of Care and Supervisory.

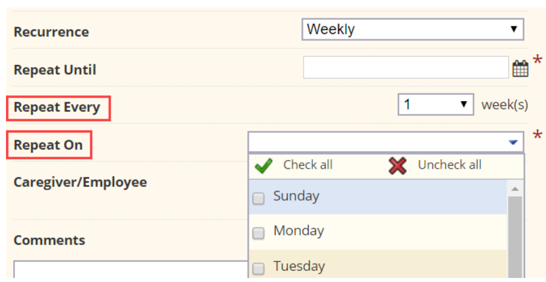


Recurrence - The recurrence feature enables the organization to easily schedule the same task out multiple times based on the client's specified need. If a recurrence schedule is used, the user must indicate an end date of the recurrence and for the daily/weekly options of how often the task repeats.

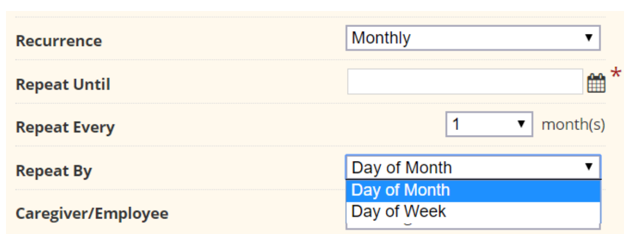
Recurrence Options:
None - No recurrence needed.
Daily - Task recurs every 'X' amount of days until the end date is reached.



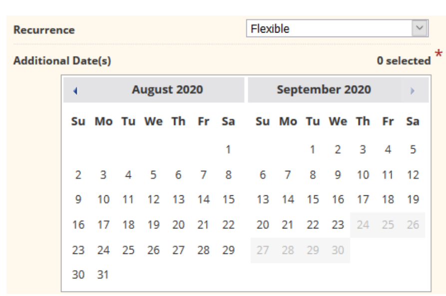
Weekly - Task repeats every 'X' number of weeks on the days selected.



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



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

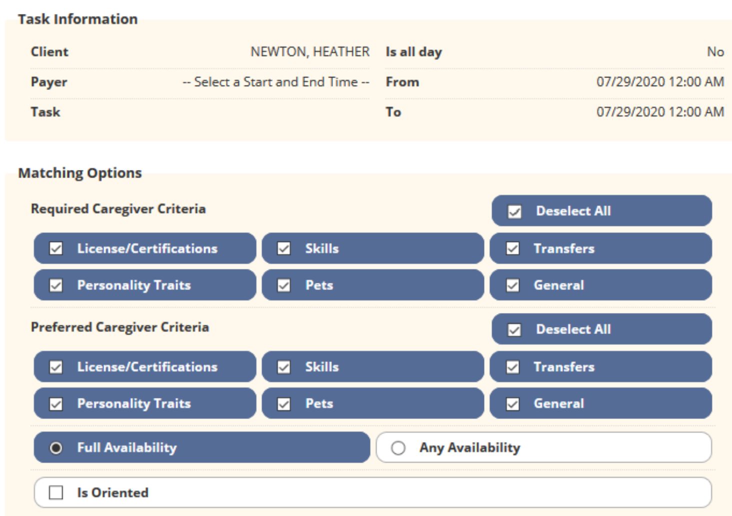


Caregiver/Employee **-** Indicate who will be completing the task. Three selections are available:

<u>Unassigned</u> **-** 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.

<u>Assign to Caregiver/Employee</u> **-** 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).

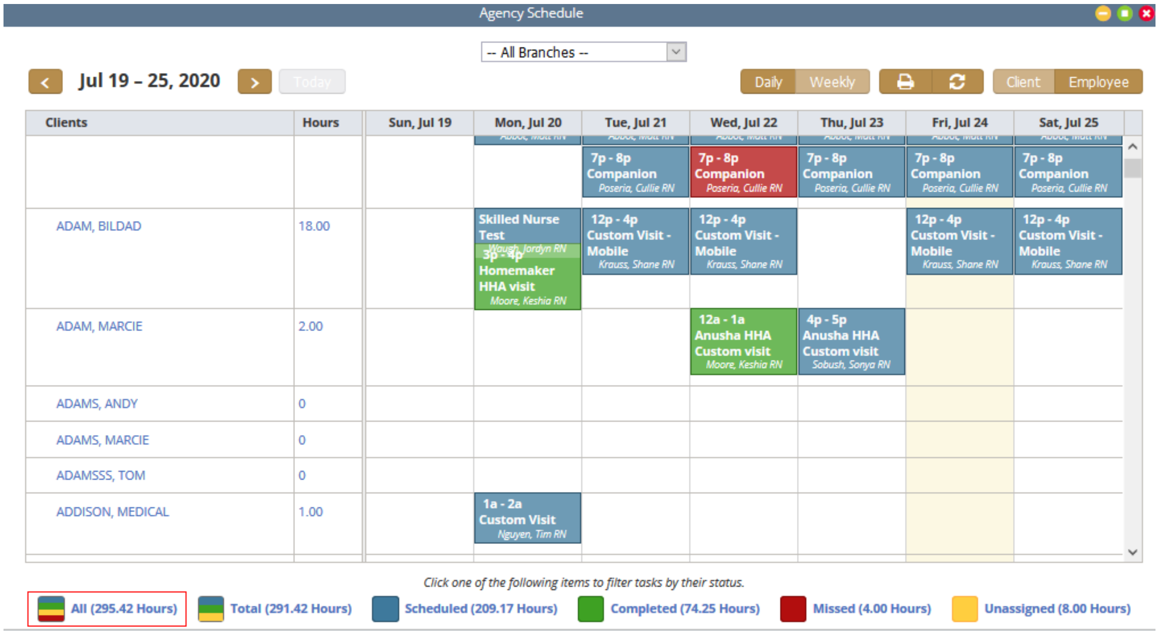
<u>Find a Match</u> **-** The last option is to search for suitable matches based upon the match criteria set up for the clients and employees.



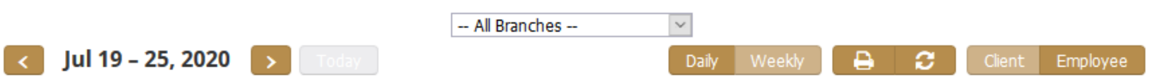
Comments & Save **-** The last step in scheduling is to add any comments about the tasks to be scheduled. These show up as a yellow sticky note on each task scheduled. Once all the information is entered completed, the organization can **Save & Close,** which will add the task/s to the client schedule.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



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.



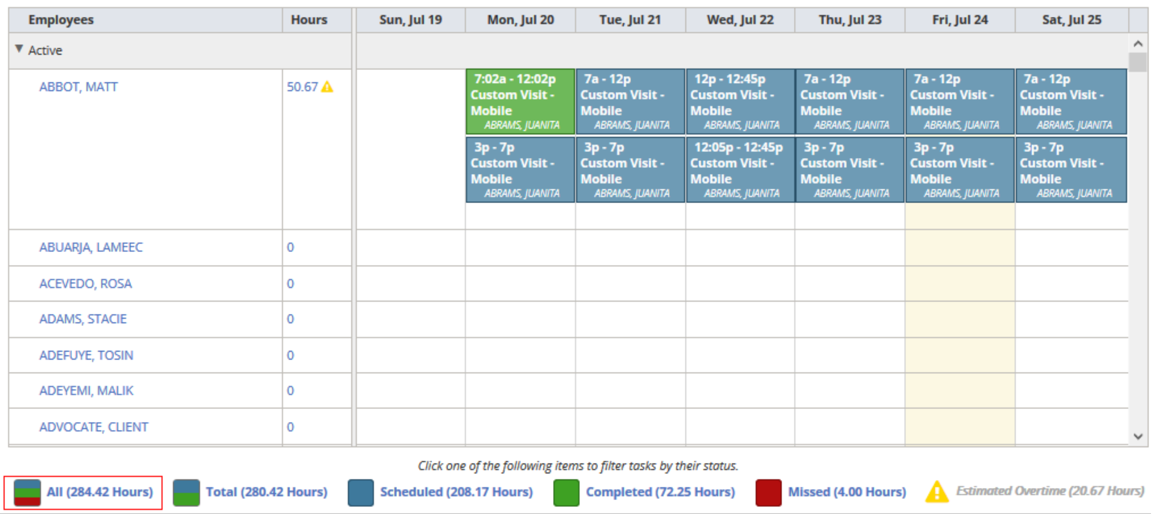
Hovering over a scheduled task to see the Quick Details. Select the Message Employee hyperlink to message the employee assigned to the task. Select the house icon next to EVV Time to view the task's EVV details.

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

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.

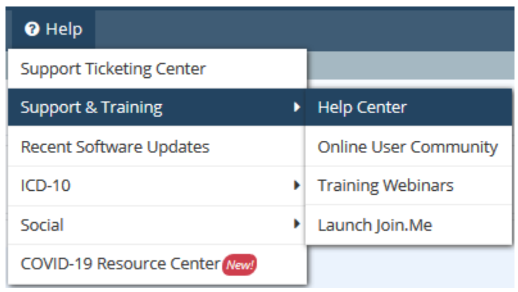


The Hours column displays the number of hours scheduled for the day or week and updates based on which filter is selected at the bottom of the page. If an employee has been scheduled over 40 hours for the week, a yellow warning icon will appear next to the employee's name in the Hours column. The summary 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/