OVERVIEW TRAINING MANUAL

July 2020

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LOG IN TO AXXESS

Navigate to www.axxess.com. Select **CLIENT LOGIN**

User inputs credentials and selects **Secure Login**.

AXXESS PLANNER

The Axxess Planner displays pertinent information specific to a user. Shortcuts have been placed on the left side of the page to allow for easy access to the Axxess applications the agency is using. Clinicians can also see upcoming visits, past due visits, unread messages, and a map of today's visits. To access patient charts, document a visit or bill for an individual patient, select the appropriate Axxess application on the left side of the page.
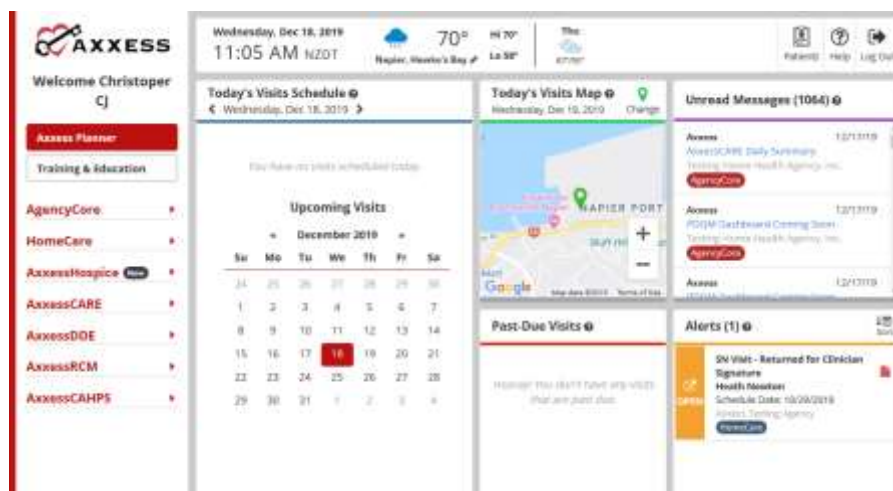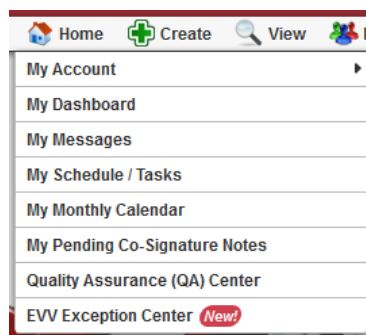
NAVIGATION MENU

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

Home

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

My Account – Users can quickly edit their profile, reset their signature or switch to different Axxess applications.

My Dashboard – This opens the Axxess Home Health dashboard.

My Messages – This opens the Message Center to view/send messages.

My Schedule / Tasks - View the schedule/tasks in a list view.

My Monthly Calendar - View the schedule/tasks in a monthly calendar view.
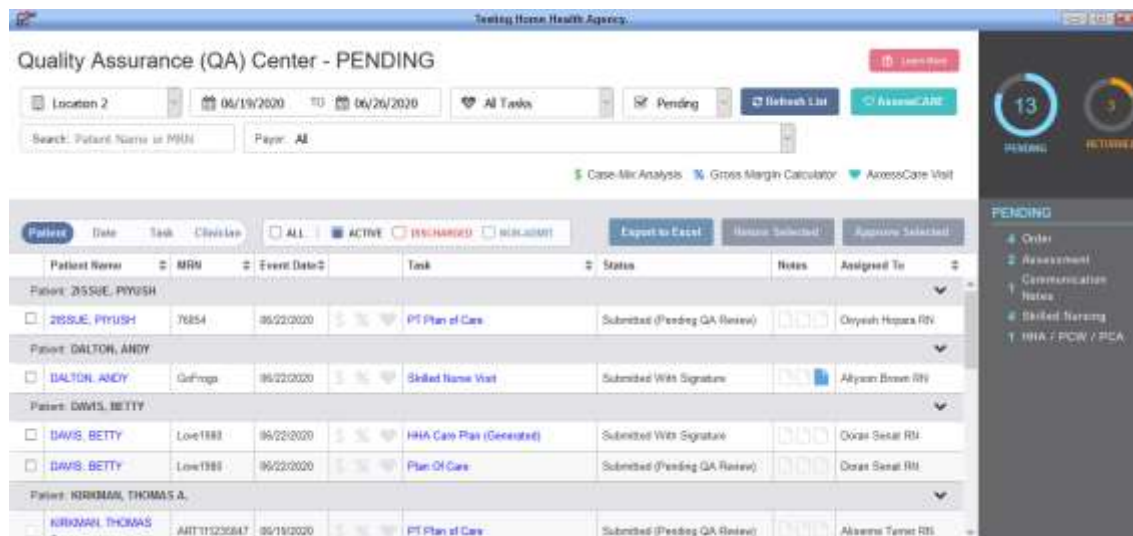
My Pending Co-Signature Notes - Sign notes that are marked to require a co-signature.

Quality Assurance (QA) Center - View tasks that are pending approval by the QA Nurse.

EVV Exception Center – Enables users to manage, correct and resubmit EVV exceptions data.

Create

The **Create** menu allows access to the following actions based on permissions granted to the user.
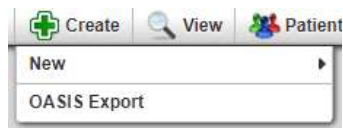
New - Add new items into the system, such as a Referral, Physician, Communication Note, etc.
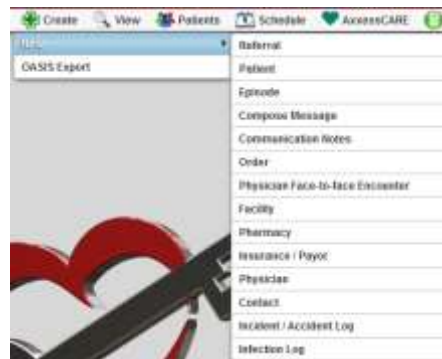
OASIS Export - View OASIS assessments that are ready to be exported and submitted to CMS.

View

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

Lists - View items in the system, such as a list of Referrals, Patients, Physicians, Insurances/Payors, etc.
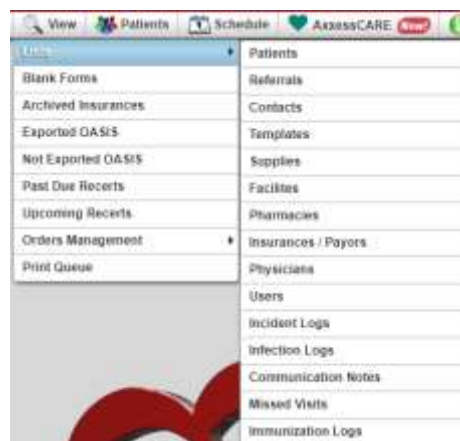
Blank Forms - View blank versions of visits to be printed and filled out manually.
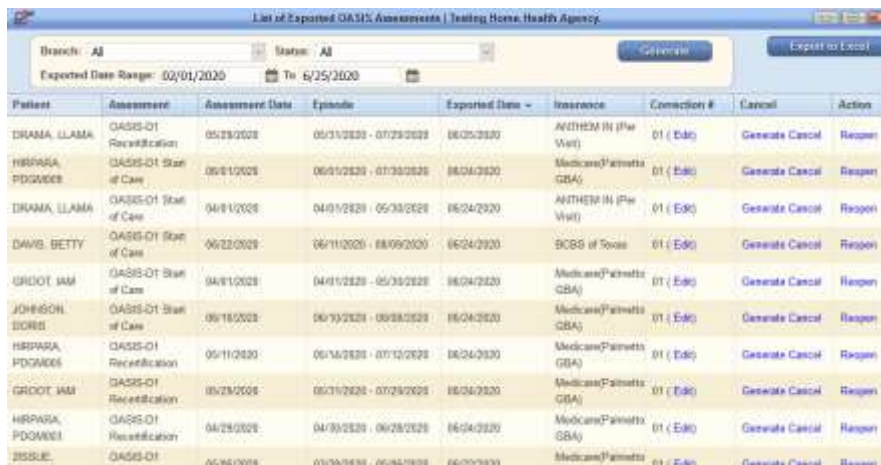

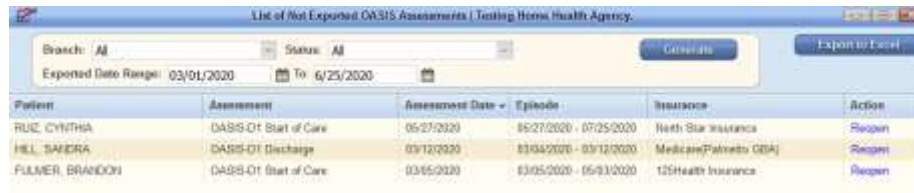**Archived Insurances -** View insurances that are no longer in use.

Exported OASIS – Review or cancel any previously exported OASIS or edit correction numbers.

Not Exported OASIS - View OASIS that were not exported from the system.

Past Due Recerts - View patient recertifications that are past their due date.

Upcoming Recerts - Review patients that have an upcoming recertification date within the next 30 days.

Orders Management - View orders that are pending co-signature, pending physician signature, orders to be sent and orders history.
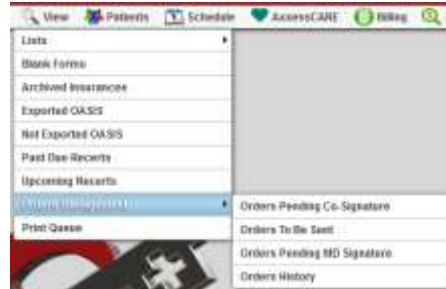
Print Queue - Displays tasks that are ready to be printed and delivered to the appropriate recipient.

Patients

The **Patients** menu allows access to the following actions based on permissions granted to the user.
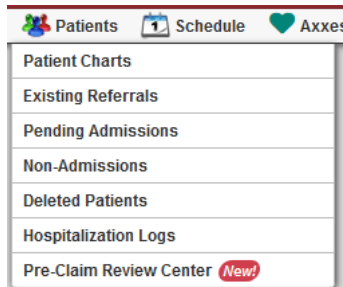
Patient Charts - View patient charts within the system, including active, pending, discharged and non-admitted patients.

Existing Referrals - View a list of pending referrals and begin the admission process.

Pending Admissions – View, edit, add, non-admit and add notes for pending admissions into the system.

Non-Admissions – An inclusive list of all non-admissions logged in the system. From this screen, a user can also admit a patient if they were mismarked.

Deleted Patients - Patients who have been deleted from the system are visible on this screen and can be restored, if necessary.

Hospitalization Logs - Patients who have been transferred to the hospital by completing a Transfer OASIS are visible on this screen for tracking purposes. New hospitalizations can also be entered from here.
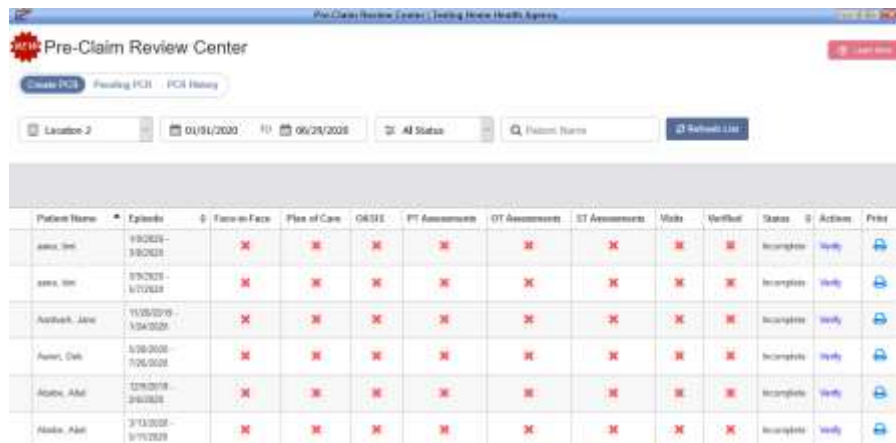
Pre-Claim Review Center - Enables agencies to efficiently and seamlessly collect and track their PCR submission documents.

Schedule

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

My Schedule / Tasks - View the schedule/tasks in a list view.

My Pending Co-Signature Notes - Notes that require a co-signature will be listed in this section until signed by the responsible co-signer.

Schedule Unassigned Visits – Enables users to view all episodes with ordered visits that have not been fulfilled and seamlessly schedule all frequency orders.
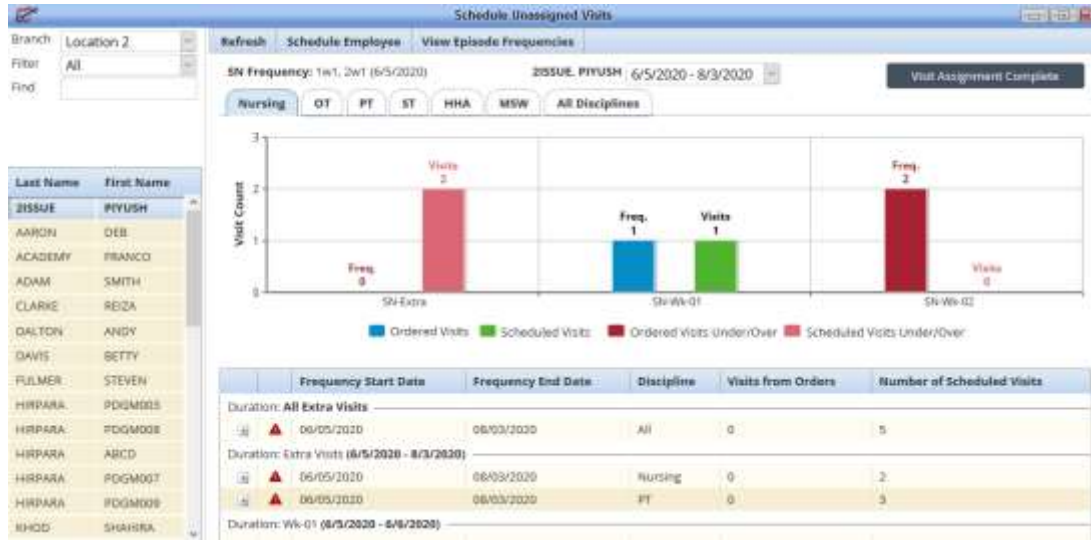
Schedule Center - Review a patient's schedule as well as completed visits and miscellaneous episode information.

Reassign Schedule - Reassign an employee's schedule to another employee for a specified date range.

Unscheduled Visits Report - This report alerts agencies to assign and schedule visits according to the ordered visit frequency.

Schedule Report - Generate a schedule report by Status, Discipline, Clinician or Patient.
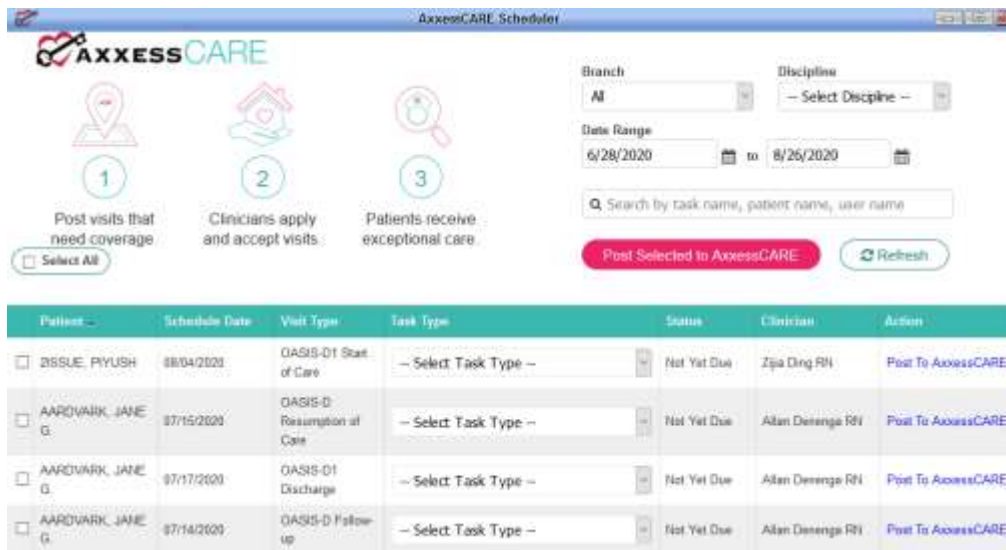
Schedule Deviation Report - This report will display visits that were completed outside of the originally scheduled date.

AxxessCARE

The **AxxessCARE** menu allows access to the following actions based on permissions granted to the user.
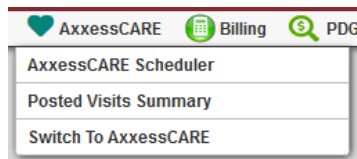
AxxessCARE Scheduler - Post multiple visits to AxxessCARE that require coverage.

Posted Visits Summary - Review the visits that have been posted to AxxessCARE along with their current visit status and assigned clinician.

NOTE: Only specific state agencies will have the option to "Post to AxxessCARE." Other states are coming soon.

Billing

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

AxxessDDE – If the agency has access to AxxessDDE, applications can be switched here.
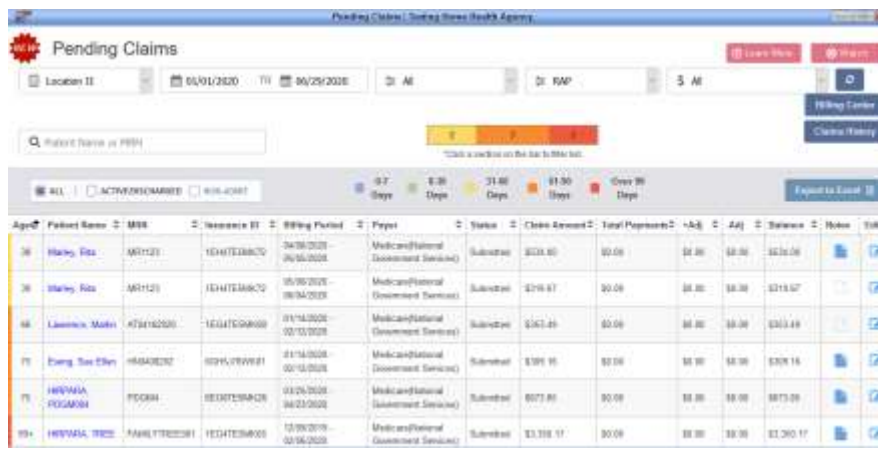
DDE Black Screen – Opens a new browser tab to access to DDE Black Screen.

Billing Center – Enables users to manage all billing processes in a central location and streamline operations to ensure timely claim submissions.

Pending Claims – Provides a centralized location for managing all Medicare and Managed Care claims that have outstanding balances.

Medicare / Medicare HMO (PPS) - This menu provides the options to create claims, view claims history and review eligibility for Medicare/Medicare HMO clients.
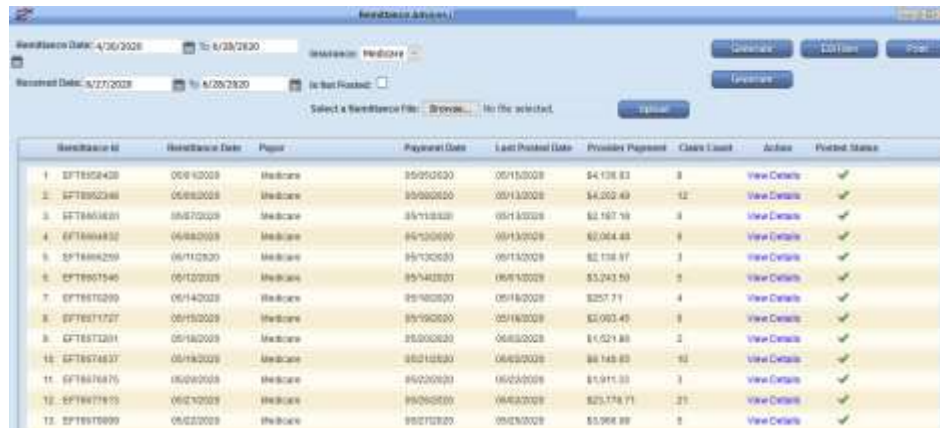
Managed Care / Other Insurances - This menu provides the options to create claims and review claims history for Managed Care/Other Insurances.

All Claims - A central location to review claims regardless of insurance or bill type.

NOTE: Claims with a start date on/after January 1st 2020 are required to be billed from Billing Center

Claim Submission History - Review submitted claims and the associated responses by Batch ID.

Remittance Advice - Review notices of remittance and electronic fund transfers.

Admin

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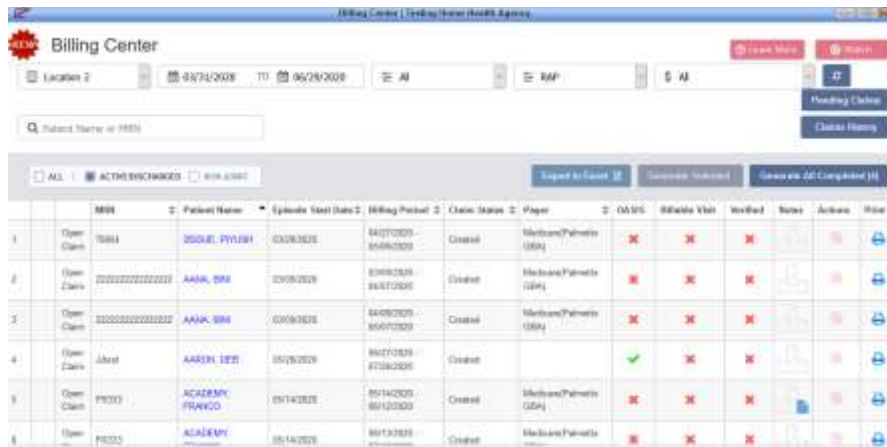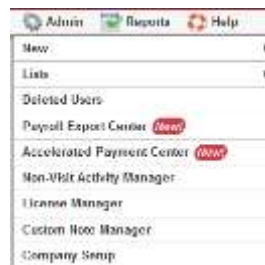

New - Add new items into the system, such as a Referral, Facility, Pharmacy, Insurance/Payer, etc.

Lists - View items in the system, such as a list of Referrals, Patients, Physicians, Insurances/Payers, etc.

Deleted Users - Users who have been deleted from the system will appear on this screen for historical purposes. These users may also be restored from within this screen.

Payroll Export Center - Enables users to generate robust payroll reporting, export ADP (.csv) and Paychex (.txt) vendor files and streamline payroll processing and operations.

Accelerated Payment Center - Provides forms, resources and information to help agencies apply for accelerated payment.

Non-Visit Activity Manager - A central entry point for non-visit activity as well as the ability to mark as paid.

License Manager - A central location to review all licenses entered into the system as well as the ability to "Add Non-User License" to the system.

Custom Note Manager - Custom notes created from a system-generated note are visible from within this screen and allow the ability to rename a note.

Company Setup - Company-wide settings and information are managed from this screen. NOTE: An Administrator/DON (permission based) signature is required to access this screen.

Reports

The **Reports** menu allows access to the following actions based on permissions granted to the user.
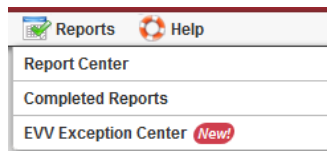
Report Center - Provides access to reports available within the system.

Completed Reports - Some reports will be queued until compiled. Once the data has been compiled, the report will be available from this section.

Help

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

Social - Connect with Axxess on social media using the quick links provided in this menu.

ICD-10 - Reference material for ICD-10 including a lookup and an ICD-9 to ICD-10 crosswalk are available from this menu.

Live Training Webinars – A link to in-depth training videos to help users get started in the Axxess Home Health, Home Care and Hospice products.

Support & Training - Allows access to the Help Center and the Axxess Community.

Recent Software Updates - To see recent software updates, please use the Resolution Center listed above in the menu.

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

RESET SIGNATURE
Home/My Account/Reset Signature

A new window will display, as seen below. Select **Reset Signature** and a link will be sent to the email address associated with the account. Review the system generated email sent to the user's email address for a personalized link to reset the signature. Upon selecting the link, a screen will appear in the web browser prompting the user to verify the information and enter a new signature.

After inputting a new signature, select **Change signature** and a prompt will display to confirm the change was successful. Close the internet browser window and log back into Axxess to use the newly updated signature.

RESET LOGIN PASSWORD
To reset the Axxess login password, follow one of the methods listed below.
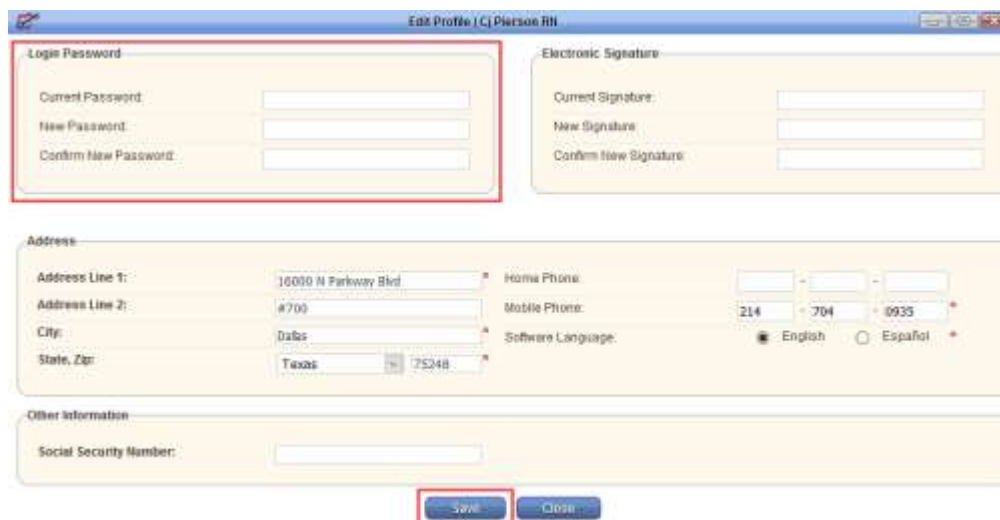
Current Login Password is Unknown

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

Current Login Password is Known

Home/My Account/Edit Profile. On this screen, input the current password and new password desired in the boxes provided. Select **Save** to confirm the change.