

OVERVIEW TRAINING MANUAL

July 2020

Table of Contents

LOG IN TO AXXESS	3
AXXESS PLANNER.....	3
NAVIGATION MENU	4
Home	4
Create.....	7
View.....	8
Patients.....	11
Schedule.....	14
AxxessCARE	16
Billing	17
Admin	19
Reports.....	21
Help	22
RESET SIGNATURE	23
RESET LOGIN PASSWORD	23
Current Login Password is Unknown.....	24
Current Login Password is Known.....	24

LOG IN TO AXXESS

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

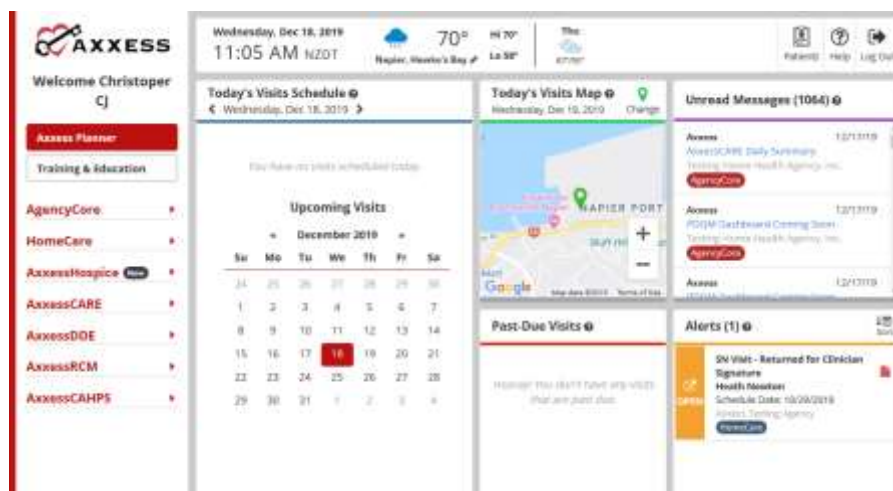


User inputs credentials and selects **Secure Login**.



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.



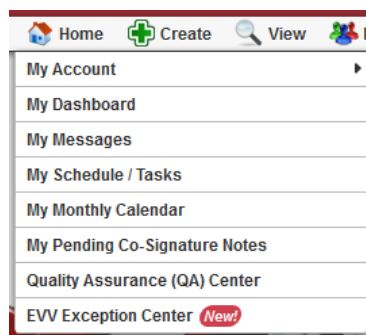
NAVIGATION MENU

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 Monthly Calendar - View the schedule/tasks in a monthly calendar view.



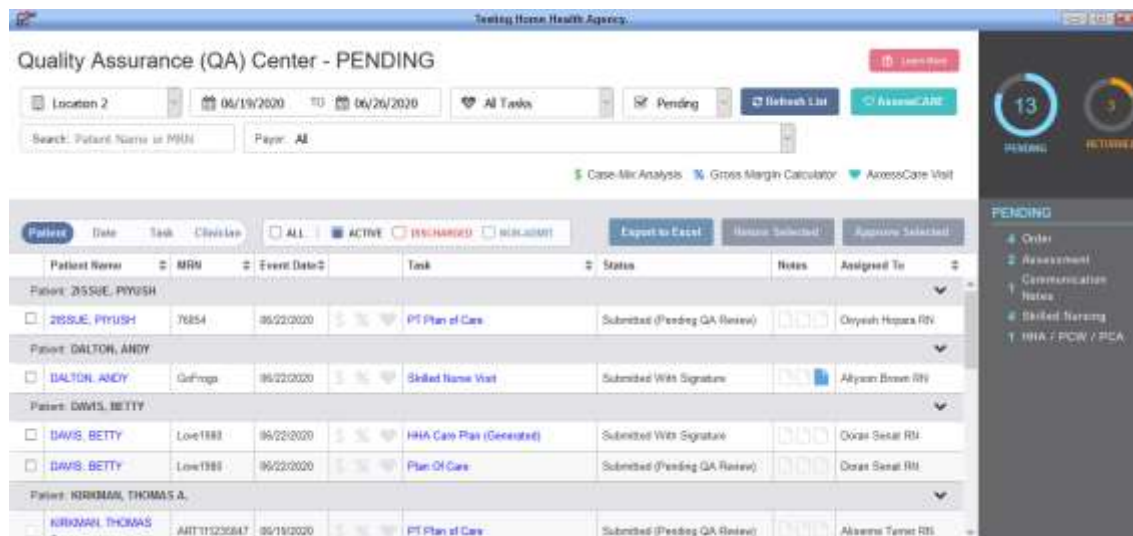
Patient Name	A	Task	Date	Status
PERSON, KERRACK		OASIS D1 Start of Care	06/07/2020	Completed (Pending QA Review)
PERSON, KERRACK		Physician Face-to-Face Encounter	06/07/2020	To Be Sent To Physician
AJASA, BABAWALE		Skilled Nurse Visit	06/17/2020	Missed Visit (Pending QA Review)
ADAM, SMITH		Skilled Nurse Visit	06/18/2020	Completed
AARON, DEB		PT Visit	06/24/2020	Not Yet Started Missed Visit Form

My Pending Co-Signature Notes - Sign notes that are marked to require a co-signature.



Event Date	Patient	Type	User	Sign Date
3/24/2020	Alexa Palmer	PT Visit	Diego Morales	3/24/2020
3/24/2020	Alexa Palmer	PT Visit	Diego Morales	3/25/2020

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



Patient	Date	Task	Client Loc	ALL	ACTIVE	DISCHARGED	WITH HISTORY	Export to Excel	None Selected	Approved Selected
Patient: ZISSUE, PYNISH										
<input type="checkbox"/> ZISSUE, PYNISH	76854	06/22/2020						PT Plan of Care	Submitted (Pending QA Review)	Oriyesh Hooper RN
Patient: DALTON, ANDY										
<input type="checkbox"/> DALTON, ANDY	GrProg	06/22/2020						Skilled Nurse Visit	Submitted With Signature	Allison Brown RN
Patient: DAVIS, BETTY										
<input type="checkbox"/> DAVIS, BETTY	Low1883	06/22/2020						HHA Care Plan (Generated)	Submitted With Signature	Dorot Senel RN
<input type="checkbox"/> DAVIS, BETTY	Low1883	06/22/2020						Plan Of Care	Submitted (Pending QA Review)	Dorot Senel RN
Patient: KIRKMAN, THOMAS A.										
<input type="checkbox"/> KIRKMAN, THOMAS	AHT11235847	05/19/2020						PT Plan of Care	Submitted (Pending QA Review)	Allawna Tarnet RN

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



Electronic Visit Verification Exception Center

– All Branches – 06/17/2020 TO 06/26/2020

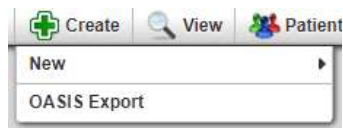
Search: Patient Name

Patient Name	Task Name	Payer	Assigned To	Visit Date	Exception	Exception Date	Provider	Actions
SMITH, DANE	Hl Tech LVN Visit	HUMANA1	Dane, Ruccio, RH	10/22/2019	The visit could not be submitted because the charge rate has not been set for the discipline task and payer. Enter a rate in the Fee Schedule section of the Edit Insurance/Payer screen.	06/24/2020	Sandata	Resubmit Ignore
SMITH, DANE	LVN Hourly	HUMANA1	Dane, Ruccio, RH	06/25/2020	The visit could not be submitted because the charge rate has not been set for the discipline task and payer. Enter a rate in the Fee Schedule section of the Edit Insurance/Payer screen.	06/25/2020	Sandata	Resubmit Ignore

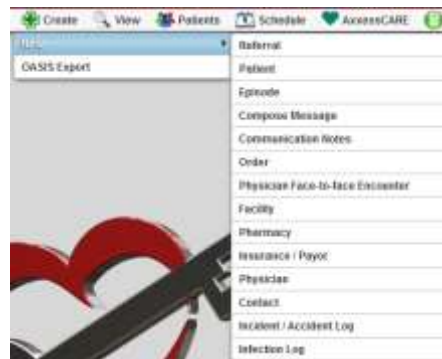
2 total results Show 10 entries

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.

OASIS Expert | Testing Home Health Agency

Branch: Location 2 Payment Source: Medicare (traditional fee-for-
 Assessment Date Range: 4/27/2020 To: 4/29/2020 [Generate](#) [Export to Excel](#)

Check/Uncheck All

#	Patient Name	Assessment Type	Assessment Date	Episode	Insurance	Correction #
<input type="checkbox"/> 1	HRRPAA, PDGWEE	OASIS-01 Start of Care	06/11/2020	84/01/2020 - 07/26/2020	Medicare/Palmisto GBA	00 (Edit)
<input type="checkbox"/> 2	HRRPAA, PDGWEE	OASIS-01 Start of Care	05/18/2020	83/18/2020 - 07/16/2020	Medicare/Palmisto GBA	00 (Edit)
<input type="checkbox"/> 3	TESTING, AFFINITY	OASIS-01 Start of Care	06/09/2020	84/09/2020 - 08/07/2020	Medicare/Palmisto GBA	00 (Edit)
<input type="checkbox"/> 4	LACY, BATTLE	OASIS-01 Start of Care	06/12/2020	84/12/2020 - 06/09/2020	Medicare/Palmisto GBA	00 (Edit)
<input type="checkbox"/> 5	CLARKE, REEA	OASIS-01 Recertification	05/09/2020	85/12/2020 - 07/18/2020	Medicare/Palmisto GBA	01 (Edit)
<input type="checkbox"/> 6	HRRPAA, ABCD	OASIS-01 Recertification	05/16/2020	84/16/2020 - 07/17/2020	Medicare/Palmisto GBA	00 (Edit)
<input type="checkbox"/> 7	MOON, HALEY	OASIS-01 Recertification	05/07/2020	85/11/2020 - 07/03/2020	Medicare/Palmisto GBA	00 (Edit)
<input type="checkbox"/> 8	HRRPAA, ABCD	OASIS-01 Other Follow-Up	06/01/2020	85/10/2020 - 07/17/2020	Medicare/Palmisto GBA	00 (Edit)
<input type="checkbox"/> 9	TESTING, AFFINITY	OASIS-01 Discharge	06/22/2020	84/09/2020 - 08/07/2020	Medicare/Palmisto GBA	00 (Edit)

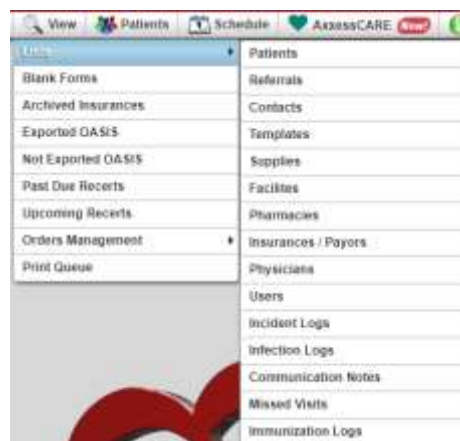
[Generate OASIS File](#) [Mark Successful as Completed](#) [Mark Successful as Completed \(Not Exported\)](#)

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/Payers, etc.



Blank Forms - View blank versions of visits to be printed and filled out manually.

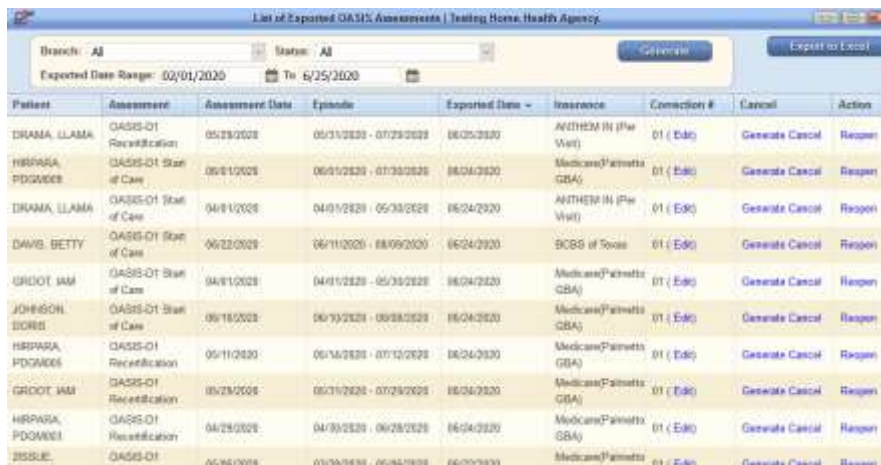


Archived Insurances - View insurances that are no longer in use.



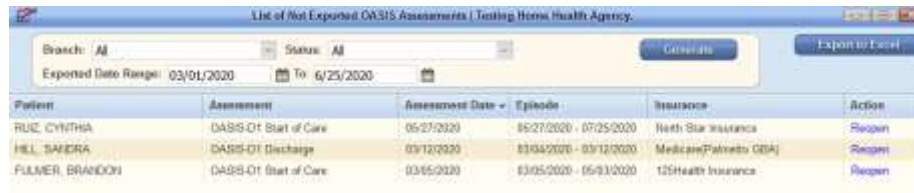
Insurance Name	Display Name	Payer Type	Payer Class	Payer ID	Invoice Type	Phone	Contact Person	Action
RESTUDY HEALTH ADMINISTRATORS INC		Private HMO/managed care		27215	US-E4			View
BlueCross Blue Shield of Texas		Private Insurance		79423	HORA 1500			View
United Insurance		Private Insurance		48794	HORA 1500			View
UVE HEALTH HEALTH		Private HMO/managed care		6298	Private			View
Cigna		Medicare HMO/managed care		32217	HORA 1500			View
Blue Cross Blue Shield of Indiana		Medicare HMO/managed care		59031	HORA 1500			View
Blue Cross Advantage		Medicare HMO/managed care	Epicodic	51198	HORA 1500			View
BCNU INSURANCE		Medicare HMO/managed care		342	US-E4			View
Blue Cross Blue Shield of Ohio		Private HMO/managed care		232884	HORA 1500			View
Munster Inc		Other/self		3924521522	HORA 1500			View
RESTUDY HEALTH COOPERATIVE		Private Insurance		77894	HORA 1500			View
Optimum		Private HMO/managed care		3634804	HORA 1500			View
Goodie		Private Insurance		55435485	HORA 1500			View
MEDICAID (BD)		Medicaid HMO/managed care		V24D5JY541V1	US-E4			View
Concept Home Health		Medicare HMO/managed care		1231	US-E4			View
WELLKARE HMO		Medicare HMO/managed care	Epicodic	14153	US-E4			View

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



Patient	Assessment	Assessment Date	Episode	Exported Date	Insurance	Correction #	Cancel	Action
DRAMA, LLAMA	OASIS-D1 Re-certification	05/23/2020	05/31/2020 - 07/29/2020	06/25/2020	ANTHEM IN (Pw Valt)	01 (Edit)	Generate Cancel	Reopen
HERRERA, PDGONES	OASIS-D1 Start of Care	06/11/2020	06/11/2020 - 07/30/2020	06/04/2020	Medicare/Painetta (GBA)	01 (Edit)	Generate Cancel	Reopen
DRAMA, LLAMA	OASIS-D1 Start of Care	04/01/2020	04/01/2020 - 05/30/2020	05/24/2020	ANTHEM IN (Pw Valt)	01 (Edit)	Generate Cancel	Reopen
DAVIS, BETTY	OASIS-D1 Start of Care	06/22/2020	06/11/2020 - 08/09/2020	06/24/2020	BCBS of Texas	01 (Edit)	Generate Cancel	Reopen
GROOT, JAM	OASIS-D1 Start of Care	04/01/2020	04/01/2020 - 05/30/2020	05/04/2020	Medicare/Painetta (GBA)	01 (Edit)	Generate Cancel	Reopen
JOHNSON, BORG	OASIS-D1 Start of Care	06/18/2020	06/19/2020 - 09/28/2020	06/24/2020	Medicare/Painetta (GBA)	01 (Edit)	Generate Cancel	Reopen
HERRERA, PDGONES	OASIS-D1 Re-certification	05/11/2020	05/14/2020 - 07/12/2020	06/24/2020	Medicare/Painetta (GBA)	01 (Edit)	Generate Cancel	Reopen
GROOT, JAM	OASIS-D1 Re-certification	05/23/2020	05/31/2020 - 07/29/2020	06/24/2020	Medicare/Painetta (GBA)	01 (Edit)	Generate Cancel	Reopen
HERRERA, PDGONES	OASIS-D1 Re-certification	04/23/2020	04/30/2020 - 06/28/2020	06/04/2020	Medicare/Painetta (GBA)	01 (Edit)	Generate Cancel	Reopen
ISSUE	OASIS-D1	05/04/2020	03/26/2020 - 05/04/2020	04/22/2020	Medicare/Painetta (GBA)	01 (Edit)	Generate Cancel	Reopen

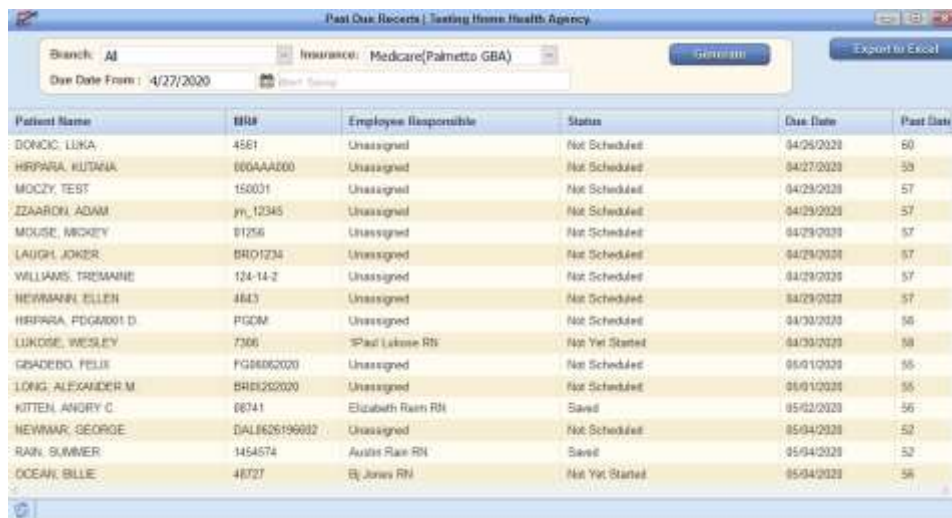
Not Exported OASIS - View OASIS that were not exported from the system.



Branch: All Status: All Generated Export to Excel
 Exported Date Range: 03/01/2020 To 6/25/2020

Patient	Assessment	Assessment Date	Episode	Insurance	Action
RUC, CYNTHIA	OASIS-OT Start of Care	05/27/2020	05/27/2020 - 07/25/2020	North Star Insurance	Recert
HILL, SANDRA	OASIS-OT Discharge	03/12/2020	03/04/2020 - 03/12/2020	Medicare(Palmetto GBA)	Recert
FULMER, BRANDON	OASIS-OT Start of Care	03/05/2020	03/05/2020 - 05/03/2020	125Health Insurance	Recert

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



Branch: All Insurance: Medicare(Palmetto GBA) Generated Export to Excel
 Due Date From: 4/27/2020

Patient Name	BRN	Employee Responsible	Status	Due Date	Past Due
DONIC, LIKA	4561	Unassigned	Not Scheduled	04/25/2020	60
HRPAPA, KUTANA	000AAA000	Unassigned	Not Scheduled	04/27/2020	39
MOCZY, TEST	150031	Unassigned	Not Scheduled	04/29/2020	57
ZZAARDN, ADAM	jm_12345	Unassigned	Not Scheduled	04/29/2020	57
MOUSE, MICKEY	01256	Unassigned	Not Scheduled	04/29/2020	57
LAUGH, JOKER	BRO1234	Unassigned	Not Scheduled	04/29/2020	57
WILLIAMS, TREMARE	124-14-2	Unassigned	Not Scheduled	04/29/2020	57
NEWMANN, ELLEN	4643	Unassigned	Not Scheduled	04/29/2020	57
HRPAPA, POGM001 D	PGDM	Unassigned	Not Scheduled	04/30/2020	56
LUKOSE, WESLEY	7306	SPad Lukose RN	Not Yet Started	04/30/2020	58
GRADERO, FELIX	PG0002020	Unassigned	Not Scheduled	05/01/2020	55
LONG, ALEXANDER M	BR02202020	Unassigned	Not Scheduled	05/01/2020	55
KITEN, ANDRY C	00741	Elizabeth Raim RN	Saved	05/02/2020	56
NEWMAR, GEORGE	DAL0625190012	Unassigned	Not Scheduled	05/04/2020	52
RAIN, SUMNER	1454574	Austin Raim RN	Saved	05/04/2020	52
OCEAN, BILIE	40727	El Jones RN	Not Yet Started	05/04/2020	58

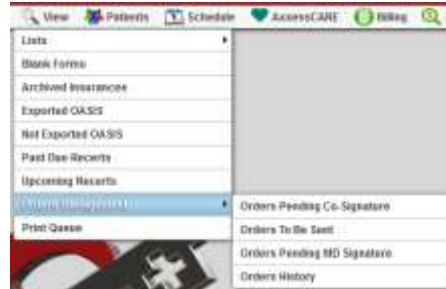
Upcoming Recerts - Review patients that have an upcoming recertification date within the next 30 days.



Branch: All Insurance: Medicare(Palmetto GBA) Generated Export to Excel

Patient Name	BRN	Employee Responsible	Status	Due Date
BEAR, FOZZY	Low1995	Unassigned	Not Scheduled	05/25/2020
KELLY, ROBERT	Low1995	Unassigned	Not Scheduled	05/25/2020
HRPAPA, KUTANA	000AAA000	Unassigned	Not Scheduled	05/26/2020
MARTY, JOHNSON	Low1990	Unassigned	Not Scheduled	05/26/2020
GREEN, YOGA	0202	Adrienne Hauser RN (deleted)	Saved	06/07/2020
MOCZY, TEST	150031	Kathia Kurse PT	Not Yet Started	06/08/2020
WILLIAMS, TREMARE	124-14-2	Unassigned	Not Scheduled	06/08/2020
NEWMANN, ELLEN	4643	Unassigned	Not Scheduled	06/08/2020
HRPAPA, POGM001 D	PGDM	Unassigned	Not Scheduled	06/29/2020
LEVITICUS, NATYA	ART05012020	Unassigned	Not Scheduled	06/29/2020
LUKOSE, WESLEY	7306	Unassigned	Not Scheduled	06/29/2020
LONG, ALEXANDER M	BR02202020	Unassigned	Not Scheduled	06/30/2020
KITEN, ANDRY C	00741	Unassigned	Not Scheduled	07/01/2020
BRZ, JOE C.	1jwll8gk1f	Unassigned	Not Scheduled	07/02/2020
BRZ, JOE C.	1jwll8gk1f	Unassigned	Not Scheduled	07/02/2020
TEST, KARTIK	3111112	Unassigned	Not Scheduled	07/02/2020

Orders Management - View orders that are pending co-signature, pending physician signature, orders to be sent and orders history.



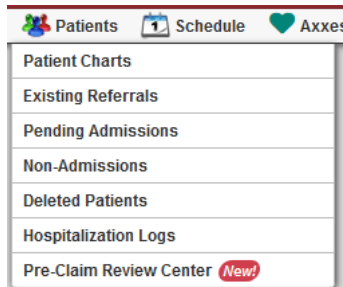
Print Queue - Displays tasks that are ready to be printed and delivered to the appropriate recipient.



Patient Name	Event Date	Task	Status	User Name
Event Date: 06/18/2020				
<input type="checkbox"/> AARDVARK, JANE G.	06/18/2020	Telehealth Visit	Submitted With Signature	G. Plante RN
<input type="checkbox"/> ADAM, SMITH	06/18/2020	Skilled Nurse Visit	Completed	G. Plante RN
<input type="checkbox"/> MILLER, MICHAEL	06/18/2020	OASIS-D1 Start of Care	Completed (Pending QA Review)	Jessie Wilkins RN
Event Date: 06/18/2020				
<input type="checkbox"/> KIDMAN, THOMAS A.	06/18/2020	PT Assessment/Evaluation	Refused For Review	Alexandra Tuttle RN
Event Date: 06/21/2020				
<input type="checkbox"/> HERRERA, FIDMOR	06/21/2020	Physician Order	Received	Diyeshk Hipara RN
Event Date: 06/22/2020				
<input type="checkbox"/> ISSUE, RYUSH	06/22/2020	PT Assessment/Evaluation	Completed	Diyeshk Hipara RN
<input type="checkbox"/> DALTON, ANDY	06/22/2020	Skilled Nurse Visit	Submitted With Signature	Alyson Brown RN
<input type="checkbox"/> DAVIS, BETTY	06/22/2020	OASIS-D1 Start of Care	Exported	Doran Senal RN
<input type="checkbox"/> KELLY, ROBERT	06/22/2020	Skilled Nurse Visit	Refused For Review	Doran Senal RN
<input type="checkbox"/> KLAUS, ILI	06/22/2020	Skilled Nurse Visit	Submitted With Signature	Cee Shaggi RN
Event Date: 06/23/2020				
<input type="checkbox"/> ...	06/23/2020	PT Assessment	Completed	Theresa Moore RN

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.



Patient Charts | Testing Home Health Agency

Branch: All
View: Active Patients
Filter: All

ZISSUE, PIYUSH (M) (W) (V) (Change Status)

MR #: 70254
 Birth Date: July 30, 1991
 Start of Care Date: 06/05/2020
 Mobile Phone: (762) 432-1345
 Physician Name: BROOKS, GERALD
 Insurance Name / ID: Medicare(Palmco GBA) / W99999V77

[Change Photo] [Change in Focus] [Add] [Edit] [View] [Directors] [Admissions Periods]

Schedule Activity | Visit Comments | Episode Comments | Missed/Retained

Task	Scheduled Date	Assigned To	Status	Action
PT Assessment/Evaluation	08/12/2020	Physik Physisk RRI	Not Yet Due	More... [Edit] [Print]
RR Assessment - Transfer	07/31/2020	Adrian Baunier RRI	Not Yet Due	More... [Edit] [Print]

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



Existing Referral List | Testing Home Health Agency

Referral Date	Name	Referral Source	Date of Birth	Gender	Status	Created By	Action
01/01/2020	Rigas, Test	Transfer from Hospital	09/21/1921	Male	Pending	Lynedeh Rigas RRI	[Edit] [Delete] [Admit] [Non-Admit]
01/12/2020	Jones, Alice	Non-Health Care Facility Point of Origin	05/16/1929	Female	Pending	Michael Ostrom RRI	[Edit] [Delete] [Admit] [Non-Admit]
02/05/2020	Ton, Tanny	Non-Health Care Facility Point of Origin	01/20/1926	Male	Pending	Eric Bryant RRI	[Edit] [Delete] [Admit] [Non-Admit]
03/24/2020	Test, Della	Clinic or Physician's Office	01/01/1920	Female	Pending	Shirley Hadley2 RRI	[Edit] [Delete] [Admit] [Non-Admit]
03/26/2020	Wardlaw, Stevie	Clinic or Physician's Office	06/24/1912	Female	Pending	Shirley Hadley2 RRI	[Edit] [Delete] [Admit] [Non-Admit]
03/31/2020	Flore, Anyssa	Clinic or Physician's Office	06/30/1929	Female	Pending	Daphne Solitare RRI	[Edit] [Delete] [Admit] [Non-Admit]

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



Pending Patient Admissions | Testing Home Health Agency

MRN	Patient	Primary Insurance	Branch	Date Added	Action
4612345	ARNOLD, GREG		Location 2	01/02/2020	[Edit] [Admit] [Non-Admit] [Notes] [Documents]
56540	BEAUX, CARTER	Medicare(Palmco GBA)	Location 2	01/11/2020	[Edit] [Admit] [Non-Admit] [Notes] [Documents]
MRN123	CAFFERY, MEL	Medicare(Palmco GBA)	Location 2	02/23/2019	[Edit] [Admit] [Non-Admit] [Notes] [Documents]
124570	CLARKE, REISA	Medicare(Palmco GBA)	Location 2	03/09/2020	[Edit] [Admit] [Non-Admit] [Notes] [Documents]
Live 1905	COLE, JEFF	Medicare(Palmco GBA)	Location 2	04/03/2020	[Edit] [Admit] [Non-Admit] [Notes] [Documents]
203656	COOLA, MEA	A New Company	Location 2	02/01/2020	[Edit] [Admit] [Non-Admit] [Notes] [Documents]
MRN430203	DOE, JOHN		Location 2	04/09/2020	[Edit] [Admit] [Non-Admit] [Notes] [Documents]
12352	ELIGIBILITY, RENAISSANCE	123Health Insurance	Location 2	04/17/2020	[Edit] [Admit] [Non-Admit] [Notes] [Documents]
14604820	ERNO, SUE ELLER	Medicare(National Government Services)	Location 1	04/08/2020	[Edit] [Admit] [Non-Admit] [Notes] [Documents]
HF-61-19	FELIGANG, HECTOR		Location 2	10/06/2019	[Edit] [Admit] [Non-Admit] [Notes] [Documents]

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.



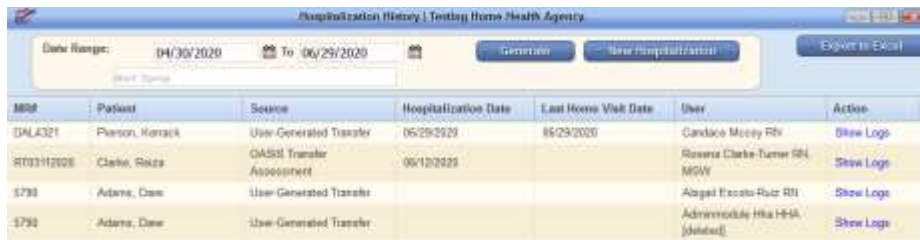
MRN	Patient	Insurance	Policy #	Address	Date of Birth	Phone	Gender	Non-Admit Reason	Non-Admit	Action
54697	Rodriguez, Michael	MEDICARE HMO	3249571584	788 Howdy Ln DALLAS TX 75214	02/09/1960	46955976	Male	Patient Refused Service	12/26/2017	Admit
00000	Bryan, Thomas	Medicare/Palm (GBA)		16000 North Dallas Tollway DALLAS TX 75243	12/02/2016	214575771	Male	Not Homebound	12/28/2016	Admit
35465	Adams, Jane	EUSTACE	Hyu564663	3605 Northaven Road DALLAS TX 75229	12/01/1950	214555343	Female	Inappropriate For Home Care	12/15/2017	Admit
106-25	May, Sally	Medicare/Palm (GBA)	111235578	16000 North Dallas Parkway ROWLETT TX 75089	12/01/1925	214555121	Female	Inappropriate For Home Care	12/07/2017	Admit
15542	Lewis, Leona	UNITEDHEALTH	53845785	378 Melody Way CUTLER OH 45724	06/19/1980	109878543	Female	Not Homebound	12/04/2017	Admit
15542	Lewis, Leona	UNITEDHEALTH	53845785	378 Melody Way CUTLER OH 45724	06/19/1980	109878543	Female	Not Homebound	12/04/2017	Admit
15542	Lewis, Leona	UNITEDHEALTH	53845785	378 Melody Way CUTLER OH 45724	06/19/1980	109878543	Female	Not Homebound	12/04/2017	Admit
15542	Lewis, Leona	UNITEDHEALTH	53845785	378 Melody Way CUTLER OH 45724	06/19/1980	109878543	Female	Not Homebound	12/04/2017	Admit
12548	Adams, Beta B	ABCDEF Insurance	123456666A	123 elm st DALLAS TX 75201	01/01/1947	316464182	Male	Patient Refused Service	12/02/2017	Admit
		MEDICARE		18050 Dallas Parkway				Referral Refused		

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



MRN	Patient	Address	Date of Birth	Gender	Phone	Last Status	Action
11	Patient, Fate	111 Fake Address Cape Coral FL 33904	09/14/2000	Female	(352) 222-2222	Active	Restore
856	Dordigny, Gail	1307 Se 33Rd St Cape Coral FL 33904	04/20/1941	Female	(470) 362-0343	Pending	Restore
153	Matuska, Kevin	224 Sw 47Th St Cape Coral FL 33914	07/11/1967	Male	(908) 803-5355	Pending	Restore
315	Patricia, Gibbons	2832 Se 17Th Pl Cape Coral FL 33904	06/12/1962	Female	(239) 984-2323	Pending	Restore
367	Enskrom, Roger		01/01/0001	Female		Pending	Restore
505	Barber, Billy R.	26201 Colony Rd Bonita Spgs FL 34135	01/10/1940	Male	(256) 453-9521	Pending	Restore
344	Bennett, Karin	11525 E Palm Dr Fort Myers FL 33908	02/22/1948	Female	(239) 466-3978	Pending	Restore
312	Roy, Jack	38 Bartley Cir Bartley Place Fort Myers FL 33907	02/28/1925	Male	(239) 939-7101	Pending	Restore
9	Frader, Freddie	222 Happy Lane Cape Coral FL 33904	10/05/1955	Female	(239) 222-2222	Active	Restore
201	Katela, Rosalee	2505 First St Apt 215 Fort Myers FL 33901	08/01/1942	Female	(813) 833-8178	Pending	Restore
874	Libe, Kathryn	2724 Ne 5Th Ave Cape Coral FL 33909	02/21/1966	Female	(239) 220-4590	Non-Admit	Restore
342	Zarick, Victor J.	1085 Hancock Creek South Blvd Apt 101 Cape Coral FL 33909	03/27/1935	Male	(239) 573-1200	Pending	Restore
882	Dangelo, Joseph	16611 Gardenia Dr Fort Myers FL 33908	12/20/1937	Male	(239) 410-2620	Active	Restore
821	Olsson, David A.	89 Poinsetta Dr Fort Myers FL 33905	02/06/1938	Male	(239) 206-1382	Pending	Restore
313	Whiteside, Anne	927 Ne 5Th Pl Cape Coral FL 33903	11/17/1962	Female	(239) 822-6712	Pending	Restore
814	Hull, William	17210 Castleview Dr N Ft Myers FL 33917	01/18/1929	Male	(813) 454-2204	Pending	Restore

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.



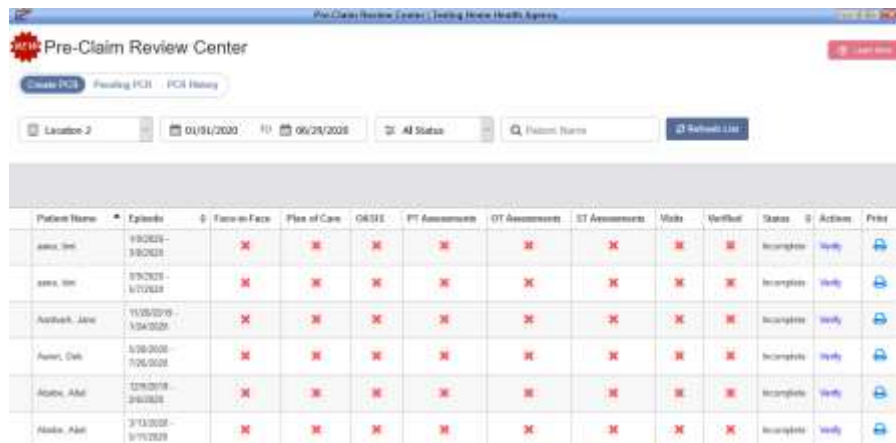
Hospitalization History | Testing Home Health Agency

Date Range: 04/30/2020 To 06/29/2020

Buttons: Generate, New Hospitalization, Export to Excel

MRN	Patient	Source	Hospitalization Date	Last Home Visit Date	User	Action
044321	Pearson, Karack	User Generated Transfer	05/29/2020	05/29/2020	Candace Mccoy RN	Show Logs
RT03112020	Clarke, Reiza	QASST Transfer Assessment	06/12/2020		Rezana Clarke-Turner RN, MSW	Show Logs
5790	Adams, Dawn	User Generated Transfer			Aligail Escoto-Ruiz RN	Show Logs
5790	Adams, Dawn	User Generated Transfer			Adminmodule HHA HHA (deleted)	Show Logs

Pre-Claim Review Center - Enables agencies to efficiently and seamlessly collect and track their PCR submission documents.



Pre-Claim Review Center

Buttons: Create PCR, Pending PCR, PCR History

Filters: Location: 2, Date Range: 01/01/2020 To 06/29/2020, All Status, Patient Name, Refresh List

Patien Name	Episodes	Face in Face	Plan of Care	OSSE	PT Assessments	OT Assessments	ST Assessments	Visits	Verified	Status	Action	Print
anna, tm	1/30/20 - 3/30/20	X	X	X	X	X	X	X	X	Incomplete	Verify	Print
anna, tm	3/30/20 - 5/12/20	X	X	X	X	X	X	X	X	Incomplete	Verify	Print
Andrieh, Jane	11/05/19 - 1/24/20	X	X	X	X	X	X	X	X	Incomplete	Verify	Print
Anna, Dawn	5/30/20 - 7/26/20	X	X	X	X	X	X	X	X	Incomplete	Verify	Print
Anna, Aida	12/10/19 - 2/6/20	X	X	X	X	X	X	X	X	Incomplete	Verify	Print
Anna, Aida	3/13/20 - 5/19/20	X	X	X	X	X	X	X	X	Incomplete	Verify	Print

Schedule

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



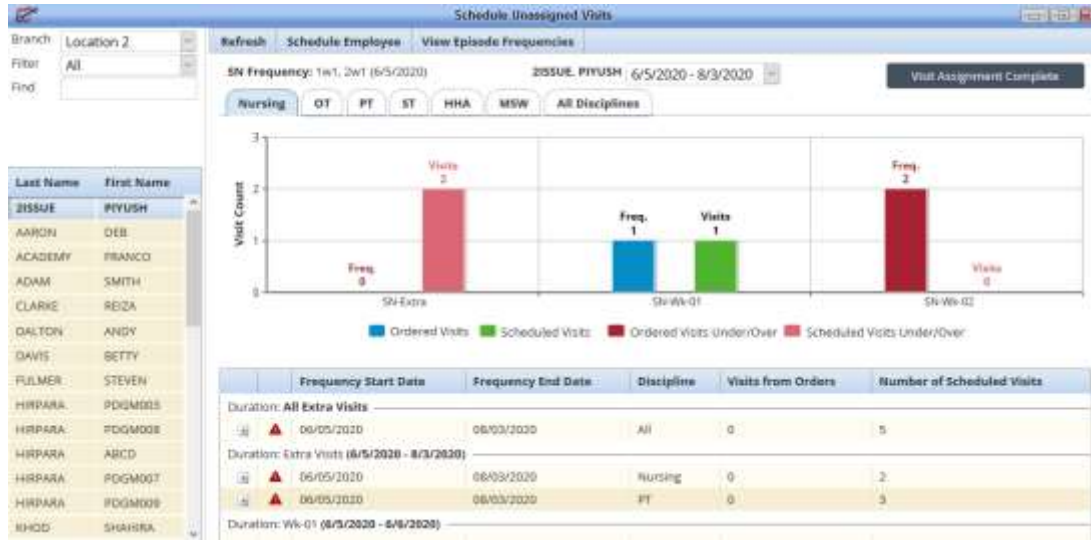
Schedule | AxxessCARE | Bill

- My Schedule / Tasks
- My Pending Co-Signature Notes
- Schedule Unassigned Visits
- Schedule Center
- Reassign Schedule
- Unscheduled Visits Report
- Schedule Report
- Schedule Deviation Report

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.

Reassign Task

Employee From:

Employee To:

Date From:

Date To:

Note: Only tasks that are not started and not yet due will be reassigned.

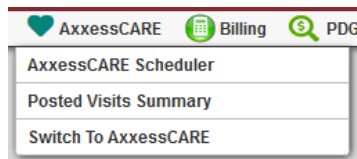
Unscheduled Visits Report - This report alerts agencies to assign and schedule visits according to the ordered visit frequency.

Schedule Report - Generate a schedule report by Status, Discipline, Clinician or Patient.

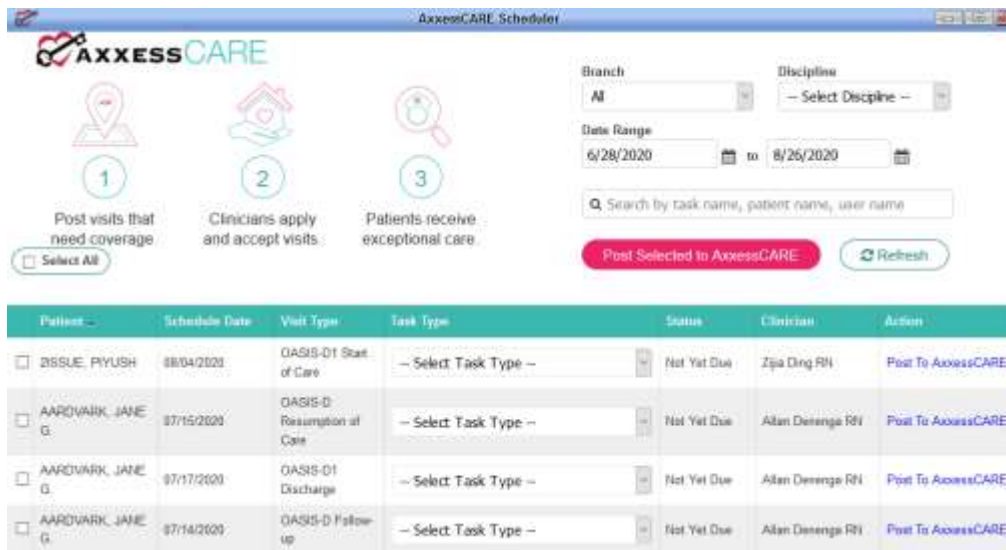
Schedule Deviation Report - This report will display visits that were completed outside of the originally scheduled date.

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.



Patient	Schedule Date	Visit Type	Task Type	Status	Clinician	Action
<input type="checkbox"/> BISSUE, PIYUSH	8/10/2020	OASIS-D1 Start of Care	-- Select Task Type --	Not Yet Due	Zipa Ding RN	Post To AxxessCARE
<input type="checkbox"/> AARDVARK, JANE G.	8/15/2020	OASIS-D Resumption of Care	-- Select Task Type --	Not Yet Due	Allan Denenga RN	Post To AxxessCARE
<input type="checkbox"/> AARDVARK, JANE G.	8/17/2020	OASIS-D1 Discharge	-- Select Task Type --	Not Yet Due	Allan Denenga RN	Post To AxxessCARE
<input type="checkbox"/> AARDVARK, JANE G.	8/18/2020	OASIS-D Follow-up	-- Select Task Type --	Not Yet Due	Allan Denenga RN	Post To AxxessCARE

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

Post Visit Summary

AccessCARE | How It Works for Home

Branch: All | Discipline: - Select Discipline -

Date Range: 5/30/2020 to 8/26/2020

Search by task name, patient name, user name

Refresh

Task	Schedule Date	Visit Status	Assigned To	Patient	Posted By	Posted Date
PT Assessment/Evaluation	6/2/2020	Not Yet Due		Zissie, Piyush	Joe Sigal RN	6/26/2020
OASIS-D1 Discharge Non-Visit	7/29/2020	Not Yet Due		Zissie, Piyush	Joe Sigal RN	6/26/2020
LVA/LPN Supervisory Visit	7/20/2020	Not Yet Due		Zissie, Piyush	Karthik Panmaraju RN	6/19/2020
LVA Hourly	7/19/2020	Not Yet Due		Zissie, Piyush	Karthik Panmaraju RN	6/19/2020
Skilled Nurse Visit	7/3/2020	Not Yet Due		Teasing, Aflinty	Sherlyn Smith RN	6/22/2020
OASIS-D1 Recertification	6/25/2020	Saved	Karthik Nurse PT	Moczy, Test	Tiffany Moczygemba RN	6/15/2020
OASIS-D1 Recertification	6/22/2020	Not Yet Started		Sanders, Dean	Sherlyn Smith RN	6/22/2020

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

Billing

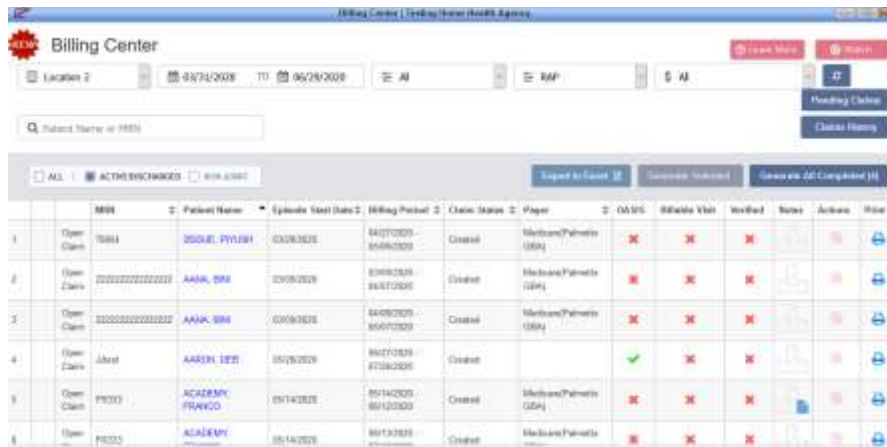
The **Billing** menu allows access to the following actions based on permissions granted to the user. **NOTE:** See Billing manuals for further details.



AxxessDDE – If the agency has access to AxxessDDE, applications can be switched here.

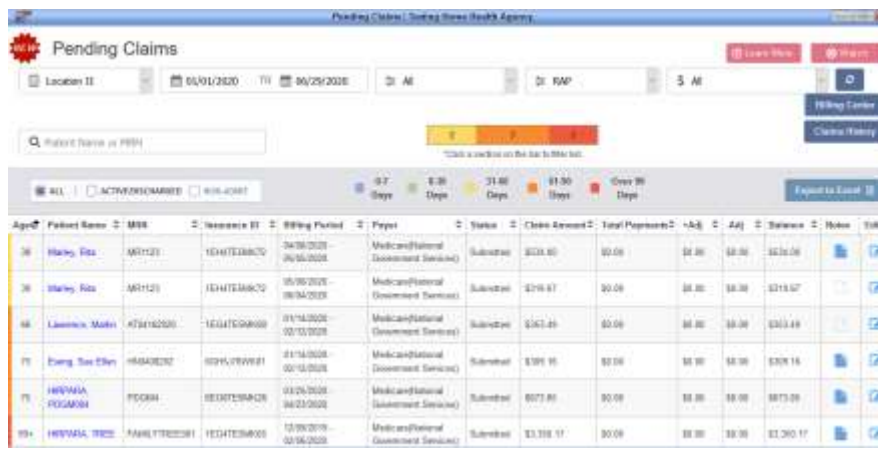
DDE Black Screen – Opens a new browser tab to access to DDE Black Screen.

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



	MBR	Patient Name	Episode Start Date	Billing Period	Claim Status	Payer	OASIS	Billable Visit	Verified	Notes	Actions	Mail
1	Open Claim 7684	2506E PYLISH	03/08/2019	04/07/2019 - 05/06/2019	Closed	Medicare/Patients (GA)		X	X	X		
2	Open Claim 222222222222222	AAAK, SIK	03/08/2019	03/08/2019 - 04/07/2019	Closed	Medicare/Patients (GA)		X	X	X		
3	Open Claim 222222222222222	AAAK, SIK	03/08/2019	04/08/2019 - 05/07/2019	Closed	Medicare/Patients (GA)		X	X	X		
4	Open Claim Jhnt	AAAKH IET	05/08/2019	06/07/2019 - 07/06/2019	Closed		✓	X	X			
5	Open Claim P833	ACADEMY FRANKO	05/14/2019	05/14/2019 - 06/13/2019	Closed	Medicare/Patients (GA)		X	X	X		
6	Open Claim P833	ACADEMY	05/14/2019	06/13/2019 - 07/12/2019	Closed	Medicare/Patients (GA)		X	X	X		

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



Age	Patient Name	MBR	Insurance ID	Billing Period	Payer	Status	Claim Amount	Total Payments	Ad	Ad	Balance	Notes	Mail
36	Wiley, Rita	AR121	1EHTEM8C2	04/30/2019 - 05/15/2019	Medicare/National Government Services	Submitted	\$238.80	\$0.00	\$0.00	\$0.00	\$238.80		
36	Wiley, Rita	AR121	1EHTEM8C2	05/16/2019 - 06/30/2019	Medicare/National Government Services	Submitted	\$216.67	\$0.00	\$0.00	\$0.00	\$216.67		
68	Lambeck, Mark	AT9410250	1E04TE98009	01/14/2019 - 02/13/2019	Medicare/National Government Services	Submitted	\$363.89	\$0.00	\$0.00	\$0.00	\$363.89		
71	Dong, Sue Chen	H860002	02H102001	01/14/2019 - 02/13/2019	Medicare/National Government Services	Submitted	\$391.95	\$0.00	\$0.00	\$0.00	\$391.95		
71	HIPANIA, ROSA	FG084	0E00TE98028	01/24/2019 - 04/23/2019	Medicare/National Government Services	Submitted	\$972.89	\$0.00	\$0.00	\$0.00	\$972.89		
84	HIPANIA, ROSA	ANMLYTR00381	1E04TE98005	10/09/2019 - 03/04/2020	Medicare/National Government Services	Submitted	\$1,310.17	\$0.00	\$0.00	\$0.00	\$1,310.17		

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

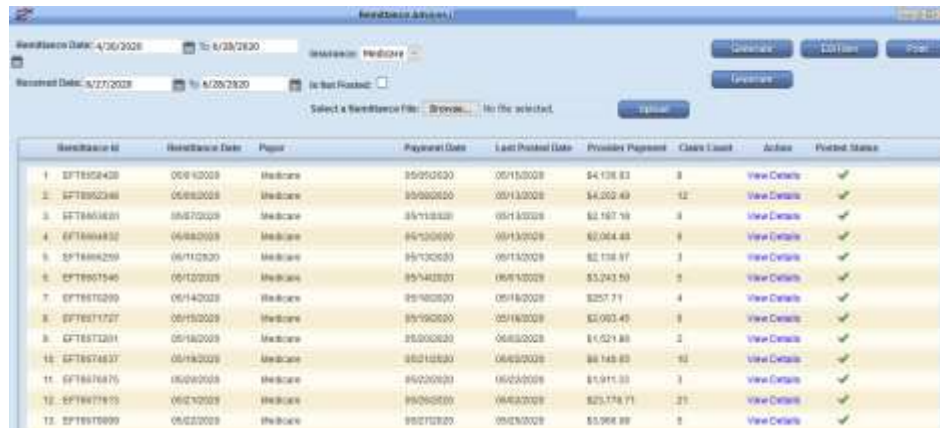
Managed Care / Other Insurances - This menu provides the options to create claims and review claims history for Managed Care/Other Insurances.

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.

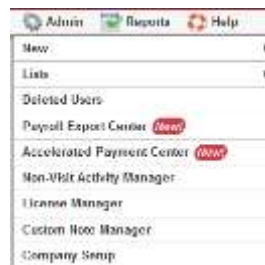
Remittance Advice - Review notices of remittance and electronic fund transfers.



Remittance ID	Remittance Date	Payer	Payment Date	Last Postal Date	Provider Payment	Claim Count	Action	Posted Status
1. EFT852420	05/04/2020	Medicare	05/05/2020	05/15/2020	\$4,138.83	8	View Details	✓
2. EFT852346	05/08/2020	Medicare	05/08/2020	05/13/2020	\$4,002.49	12	View Details	✓
3. EFT851820	05/27/2020	Medicare	05/13/2020	05/13/2020	\$2,167.98	8	View Details	✓
4. EFT850492	06/02/2020	Medicare	05/20/2020	05/13/2020	\$2,044.43	9	View Details	✓
5. EFT849259	06/11/2020	Medicare	05/13/2020	05/13/2020	\$2,138.87	3	View Details	✓
6. EFT8501540	06/12/2020	Medicare	05/14/2020	06/01/2020	\$3,243.50	5	View Details	✓
7. EFT8510299	06/14/2020	Medicare	05/18/2020	05/18/2020	\$257.71	4	View Details	✓
8. EFT8511727	06/15/2020	Medicare	05/19/2020	05/18/2020	\$2,093.45	9	View Details	✓
9. EFT8512851	06/18/2020	Medicare	05/08/2020	06/03/2020	\$1,521.89	2	View Details	✓
10. EFT8514637	06/19/2020	Medicare	06/11/2020	06/03/2020	\$6,145.85	10	View Details	✓
11. EFT8516875	06/04/2020	Medicare	05/20/2020	05/20/2020	\$1,911.55	3	View Details	✓
12. EFT8517195	06/24/2020	Medicare	05/26/2020	06/02/2020	\$23,778.71	21	View Details	✓
13. EFT8519899	06/22/2020	Medicare	06/02/2020	06/25/2020	\$5,968.89	8	View Details	✓

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.

Accelerated Payment Center

Location:

Forms and Resources	Revenue - Past 3 Months	Pre-Application Recommendations
CMS Accelerated Payment Exit Sheet	<p>\$17,910.57</p> <p>03/04/2020 - 06/01/2020</p> <p>View Full Report</p>	<p>Review: COVID-19 Accelerated Payment Request Status</p>
Eligibility Criteria	Application Resources	Submitting an Application
<p>To qualify for advanced/accelerated payments the provider/supplier must:</p> <ol style="list-style-type: none"> 1. Have billed Medicare for claims within 180 days immediately prior to the date of signature on the provider/supplier's request form 2. Not be in bankruptcy 3. Not be under active medical review or program integrity investigation 4. Not have any outstanding delinquent Medicare overpayments 	<p>To apply please fill out the Accelerated Payment Application</p> <p>The following information can be used to complete the Accelerated Payment form.</p> <p>National Provider Identifier (NPI): 1234567899</p> <p>Provider Number (PTANI): 027662</p>	<p>While electronic submission will significantly reduce the processing time, requests can be submitted to the appropriate MAC by fax, email, or mail.</p> <p>Electronically</p> <p>Email: JVA.FINANCIALRELIEF@palmettogba.com</p> <p>Fax: (803) 662-2574</p> <p>Mail: Provider Reimbursement (AG-330) 2300 Springsdale Drive, Blt, GA 30429</p>

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.**



Company Setup | Testing Home Health Agency

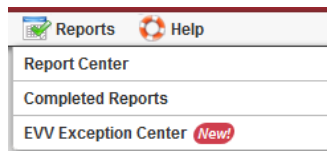
Testing Home Health Agency.
Agency Branch: Location 2 * - Required Field

Company Information

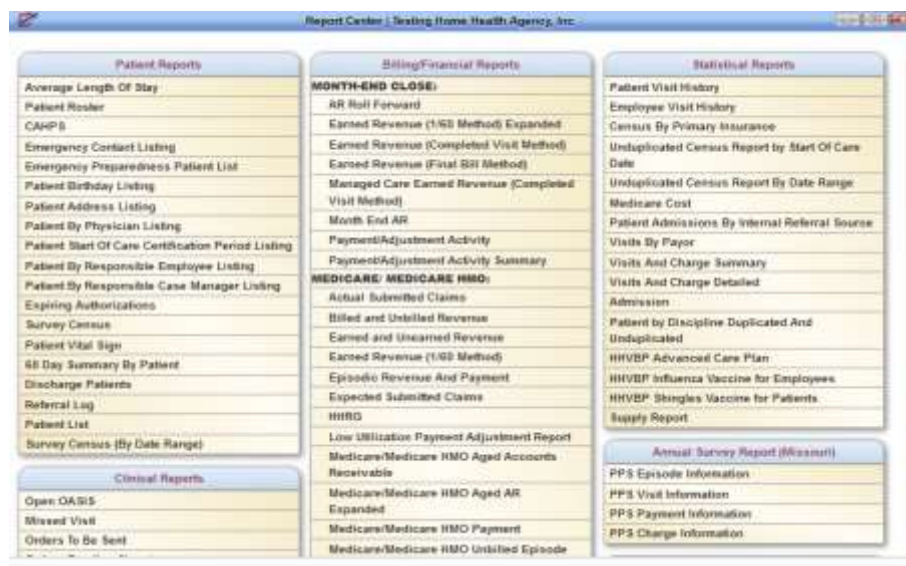
Company Name: Testing Home Health Agency * National Provider Number: 1234567890
 Tax ID: 187654321 * Medicare Provider Number: 027652
 Tax ID Type: EIN (Employer Identification Num) Medicaid Provider Number: 45678901
 Contact Person Email: jdy@axxessconsult.com * Unique Agency OASIS ID Code: 123456700000
 Contact Person Phone: 214 - 375 - 7711 * Contact Person First Name: John *
 CAHPS Vendor: Strategic Healthcare Programs Contact Person Last Name: Clafide *
 Medicaid Provider Identifier: 234555 DME Medicaid Provider Identifier: 234555

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.



Report Center | Testing Home Health Agency, Inc.

Patient Reports	Billing/Financial Reports	Statistical Reports
Average Length Of Stay	MONTH-END CLOSE:	Patient Visit History
Patient Roster	AR Roll Forward	Employee Visit History
CAHPS	Earned Revenue (1/53 Method) Expanded	Census By Primary Insurance
Emergency Contact Listing	Earned Revenue (Completed Visit Method)	Unduplicated Census Report by Start Of Care Date
Emergency Preparedness Patient List	Earned Revenue (Final SSI Method)	Unduplicated Census Report By Date Range
Patient Birthday Listing	Managed Care Earned Revenue (Completed Visit Method)	Medicare Cost
Patient Address Listing	Month End AR	Patient Admissions By Internal Referral Source
Patient By Physician Listing	Payment/Adjustment Activity	Visits By Payer
Patient Start Of Care Certification Period Listing	Payment/Adjustment Activity Summary	Visits And Charge Summary
Patient By Responsible Employee Listing	MEDICARE/ MEDICARE HMO:	Visits And Charge Detailed
Patient By Responsible Case Manager Listing	Actual Submitted Claims	Admission
Expiring Authorizations	Billed and Unbilled Revenue	Patient by Discipline Duplicated And Unduplicated
Survey Census	Earned and Unearned Revenue	HHVBP Advanced Care Plan
Patient Vital Signs	Earned Revenue (1/53 Method)	HHVBP Influenza Vaccine for Employees
30 Day Summary By Patient	Episode Revenue And Payment	HHVBP Shingles Vaccine for Patients
Discharge Patients	Expected Submitted Claims	Supply Report
Referral Log	HRSD	Annual Survey Report (R242411)
Patient List	Low Utilization Payment Adjustment Report	PPS Episode Information
Survey Census (By Date Range)	Medicare/Medicare HMO Aged Accounts Receivable	PPS Visit Information
	Medicare/Medicare HMO Aged AR Expanded	PPS Payment Information
	Medicare/Medicare HMO Payment	PPS Charge Information
	Medicare/Medicare HMO Unbilled Episode	

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

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.

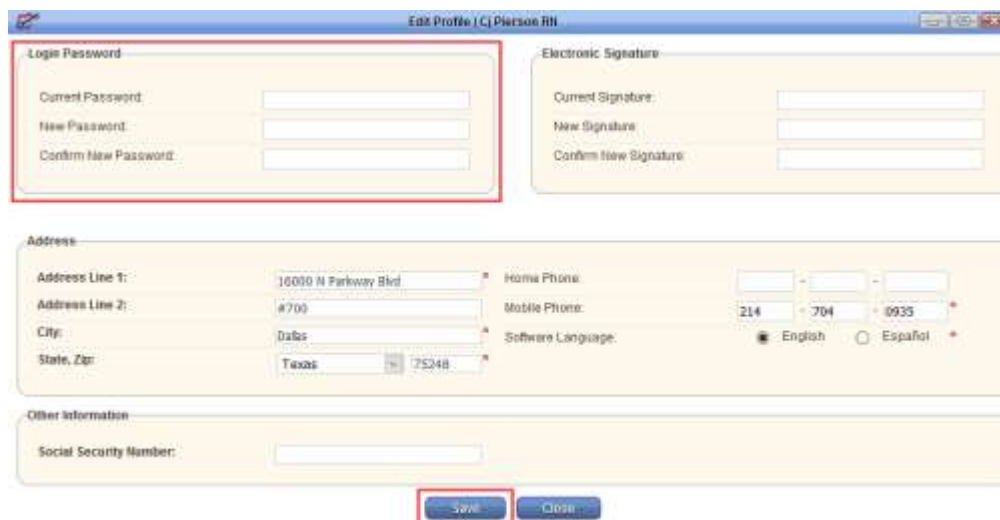
Current Login Password is Unknown

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.



The image shows the AXXESS login page. At the top is the AXXESS logo. Below it are two input fields: "Email address" and "Password". Under the "Password" field, there is a checkbox labeled "Remember Me" and a link labeled "Forgot your Password?". At the bottom of the form is a red button labeled "Secure Login".

Current Login Password is Known



The image shows a screenshot of the "Edit Profile" form. The form is titled "Edit Profile | Cj.Platsee RH". It is divided into several sections:

- Login Password:** Contains three input fields: "Current Password", "New Password", and "Confirm New Password".
- Electronic Signature:** Contains three input fields: "Current Signature", "New Signature", and "Confirm New Signature".
- Address:** Contains several input fields: "Address Line 1:" (with "10000 N Parkway Blvd"), "Address Line 2:" (with "4700"), "City:" (with "Dallas"), "State, Zip:" (with "Texas" and "75248"), "Home Phone:", "Mobile Phone:" (with "214", "704", and "0935"), and "Software Language:" (with "English" selected and "Español" as an option).
- Other Information:** Contains one input field: "Social Security Number:".

At the bottom of the form are two buttons: "Save" and "Close".

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.