

HOME CARE ADMINISTRATOR OVERVIEW QUICK REFERENCE GUIDE

February 2022

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COMPANY SETUP

Admin/Company Setup

1. Enter Signature **NOTE:** User must have Administrator role in their user profile.
2. Select **Proceed**.

Information - Enter the organization's information. IDs and Provider Numbers are retrieved outside of Axxess. **NOTE:** Red asterisk (*) means required to save the page. Select the following buttons to toggle through Company Setup.

- **Save** will keep the information entered in the current page.
- **Save & Next** will keep the current page information and move to next tab.
- **Next** will move to the next tab without saving any information.
- **Close** will shut down the window.

Subscription Plan - In this section, the current Monthly Subscription plan is shown. Adjust the organization's subscription-based on Number of Users and/or Active Census by:

1. Enter request in the Comments section,
2. Enter Signature.
3. Select **Submit Request**.


Enter a Ticket in the Support Ticketing Center to downgrade the organization's plan.

External Integrations - The organization can connect their Home Care application to selective outside vendors for services like Electronic Visit Verification (EVV).

1. Choose Provider from the dropdown.
2. Enter Branch(es).
3. Choose State.
4. Enter Payment Source.
5. If the organization has more than one provider, select **Add Provider**. To delete, select **Remove Provider**.

Billing - This window enables users to decide Billing settings.

1. Choose the first day of the weekly billing cycle.
2. Decide to enable an Alternate Remittance Address
 - a. If so, choose the Address Type, enter the Name and then enter the address.
3. Enter Modifiable Invoice Columns.
4. Set the organization's Invoice Number Sequence.
5. Add Invoice Comments
 - a. Select **Add New**.
 - b. Edit, remove or make comments default that have been previously added by selecting the corresponding icons.

Optional: If the organization wants to have a personal invoice message, select the Email Message checkbox and fill out Subject Line and Body. **NOTE:** Hover over the information  icon to get insight into questions.

6. Decide to enable Remittance Posting.
 - a. If so, choose the date on or after for remittance posting of claims billed.
7. **Add, Edit, Save or Delete** Payer Categories
8. Decide how long the First and Second Alert will be for Late Arrivals and Departures (in minutes) for EVV.
 - a. Enter who will be notified.
 - b. Choose whether the Axxess Home Care mobile app will allow manual time entry or EVV will be actual visit time.

Financial – Determine financial settings.

1. Decide to have a Closed Accounting date and if so, enter a date.
2. Assign account numbers based on the organization's accounting system.

Payroll - Payroll Policy - Determine how employees will be paid when it comes to mileage, travel time, payroll date and cycle.



1. Enter the Company's mileage and travel time reimbursement rate.
2. Enter the First Day of Payroll.
3. Choose how often employees will be paid.
4. Enter what will be listed as the three base shifts of the day.
5. Decide to enable Payroll Shift Differentials.
6. Determine if the organization will Round Start or End Time for shifts.
7. Enable unpaid meal breaks and set up Shift Duration Requirements.

8. Enter the Maximum Time/Overtime Defaults (if the organization pays overtime). Then determine if the user will be notified (warning or error) when scheduling if the limits are exceeded.
9. Select **Add Municipalities** if employees are paid a certain rate per region.
 - a. After being added, they can be edited or removed by selecting **Edit** and **Delete**, respectively.

Payroll – Pay Rates - Set up organization pay rates for all employees/users.
NOTE: Individual pay rates can be added under the **Employee Center**.

- Filter for specific Employee, Payment Source, Client and/or Task Status by selecting one or multiple dropdown menus.
- Select **Generate**.
- The legend explains the Default Rate that will be shaded blue and the Specific Rate will be green. The orange exclamation point will indicate “A rate will override this in the future” and the green exclamation point indicates that a “Future rate has been applied.”

Hover over a rate for specifics. Select **Edit** or **Delete** to make updates.

1. Select **New**.
2. Choose Task.
3. Enter a dollar amount and choose time type.
4. Enter Effective Date.
5. Select box(es) to determine which Employee, Payment Source and/or Client that the rate is applicable to. Enter keywords to search. Select the “All” checkbox if the rate applies to every Employee, Payment Source and/or Client.
6. Decide if the rate applies to a specific Shift or Day of the Week. Select the green checkmark  icon if the rate applies to all shifts and/or days. Select the red X  icon to uncheck all boxes.
7. Determine if the pay rate should include Mileage. Enter rate. **NOTE:** If not entered, the organization’s default rate will be used for mileage.
8. Determine if the pay rate should include Travel Time. Enter rate. **NOTE:** If not entered, the organization’s default rate will be used for travel time.

Select **Save & Close**.

Payroll – Holidays – Users can enter default holidays or create their own organization-specific holidays.

To Add Default

1. Select **Add Default Holidays** for the first-time setup from the following list:
 - Inauguration Day
 - Washington's Birthday
 - Easter Sunday
 - Independence Day
 - Labor Day
 - Columbus Day
 - Veterans Day
 - Thanksgiving Day
 - Christmas Eve
2. Select **Add Holidays**.

To Add New

1. Select **New**.
2. Enter a Name.
3. Decide the Occurrence.
4. Decide the Time.
5. Determine whether the holiday follows rules.
6. Select **Save**.

NOTE: The License, Scheduling, Document Management, Custom Care Documentation and Custom Service Documentation tabs have search functionality at the top of the screen to narrow down results. There are also options in some tabs to filter between active or inactive entries.

License & Compliance – Enables organizations to manage licenses or compliance items that must be completed/updated.

1. Select **Add New Type of License/Compliance**.
2. Enter Name.
3. Select **Save Changes**.
 - a. Select **Delete** to remove.

Clinical – Organizations must determine their clinical settings.


1. Decide the Plan of Care PDF Format.
2. Add Physician Certification Statement by selecting **Add New**.
 - a. Make updates by selecting **Edit**, **Delete** or **Make Default** hyperlinks.

3. Enable or disable Require Time Entry for Documentation, Conditions of Participation Items, Prevent Future Documentation and/or Custom Service Documentation.


Scheduling – Organizations must determine their scheduling settings.

1. Decide if users can schedule billable tasks (without an authorization) with a warning or prevent from scheduling.
2. Enter the Crossover time limit.
3. Decide to enable Scheduling Conflict Filtering and/or Fee-Based Scheduling.
4. Decide on Family Care settings, including Client Advocate Role, Family Provider Limits and Prevent Scheduling.
 - a. Also, add Customer Provider Limits per branch.
5. **Add New, Edit and Deactivate** visit types in Visit Management.
6. View or search through Matching Criteria. To create new criteria, select **Add Custom Criteria**.
 - a. Choose Category.
 - b. Enter Client Matching Criteria.
 - c. Enter Employee Matching Criteria.
 - d. Select **Save Changes**.
 - i. Select **Delete** to remove.

Document Management – The organization can create custom notes. Filter by Status or search through the list. Select **Refresh** to update the list. Create new by following these steps:

1. Select **New**.
2. Enter the Title and Description.
3. Choose the Discipline and what type of assessment will be in the note (Documentation). Visits with an  icon are available on the mobile app.
4. Checkboxes to indicate whether the note has the following settings: Billable, Payable, Record Order, Supplies, Wounds, eMAR, I/O, Seizure, Vent Flow Sheet, Narrative, Oxygen Risk Assessment and/or a Fall Risk Assessment.
5. Select **Save**.
 - a. Select **Edit** to update or select **Deactivate** to remove.

Custom Care Documentation - Daily Living Tasks - Organizations can determine what Daily Living Tasks that their employees can be asked to perform. Search through the list or create new by following these steps:

1. Select **Add New Category**.
 - a. Enter Title.
 - b. Enter Description.
 - c. Select **Save Changes**.
2. Select plus sign icon  to expand Category.
3. Select **Add New Task**.
 - a. Enter the Title.
 - b. Enter Instructions of the Task.
 - c. Select **Save Changes**.

Change the order by selecting either up or down arrows for Tasks or Categories. Select **Delete** to remove.

Custom Care Documentation - Care Plan/Note Associations -

Organizations can add relationships between custom visit notes and custom care plans. Filter by Text, which will search through the list. List defaults to Active associations. Create new care plan associations by following these steps:

1. Select **Add New**.
2. Choose Visit Note.
3. Choose a Care Plan.
4. Select **Save & Close** or **Save & Add Another** for additional associations.
 - a. Select the **Discontinue** hyperlink to inactivate.

Custom Service Documentation - Scoring Lists

Select the **Scoring List** tab to enforce score entry when a caregiver indicates the completion of a client's goal. To create a new scoring list:

1. Select **Add New**.
2. On the **Add Scoring List** window, name the list and select a scoring type.
3. For each value, choose whether to require secondary responses.
4. Check the box next to **Secondary Response** to require additional information from a caregiver when the respective response is selected.
5. Select **Save & Close** or **Save & Add Another** for additional scoring lists.
 - a. Select the **Discontinue** hyperlink to inactivate.

Custom Service Documentation - Service Plan/Note Associations

Create new service plan associations by following these steps:

1. Select **Add New**.
2. Choose Service Note.
3. Choose a Service Plan.
4. Choose Service Plan Lists (select up to five).
5. Select **Save & Close** or **Save & Add Another** for additional associations.
 - a. Select the **Discontinue** hyperlink to inactivate.

Client Chart Information - Emergency Triage Levels - The organization can choose from either default triage levels or add ones of their own.

Add Default

1. Select **Add Default Triage Levels** for the first-time setup.
 - a. Select the **Edit** or **Delete** for updates.
2. The Default Triage Levels are:

Priority 1 - Life-threatening (or potential).

Priority 2 - Non life-threatening but would suffer severe adverse effects.

Priority 3 - Visits could be postponed 24-48 hours without adverse effects.

Priority 4 - Visits could be postponed 72-96 hours without adverse effects.

Priority 5 - Not Serious.

Add New

1. Select **New**.

NOTE: Priority level defaults to the next number and cannot be edited.
2. Enter Title, Short & Long Description.
3. Select **Save**.

Client Chart Information - Services Required - Organizations can add default services and/or create new services.

Select **Add Default Services Required** for first time setup. Select **Edit** or **Delete** for updates. To manually add:

1. Select **New**.
2. Enter Name.
3. Choose Client Type.
4. Enter Description.
5. Select **Save**.

Client Chart Information - Durable Medical Equipment -

Organizations can add default Durable Medical Equipment (DME) and/or create new DME.

Select **Add Default DMEs** for the first-time setup. Select **Edit** or **Delete** for updates. To manually add:

1. Select **New**.
2. Enter Name and Description.
3. Select **Save**.

ADDING A NEW USER

Admin/New/User

All asterisked items are required. The new user window is divided into seven tabs:

Information - Fill out the demographics of the user. **NOTE:** The Permissions tab and the email address is not required if the “User has access to the software” option is unchecked.

1. Enter Personal Information.
2. Select **Check for User Conflict** to prevent adding duplicate users.
3. Choose Credentials, Title and Agency Branch.
4. Check the box for agency defaults for Maximum Time/Overtime.
5. Select System Roles. **NOTE:** Roles are important in the software because they determine what a user can or cannot see, select, delete or undo.
6. Check the **Allow Weekend Access** box to be able to login during the weekend. Decide the Earliest Login Time and Automatic Login time.
7. Select the checkbox if the user should be notified for late EVV clock in/out to the Alert Center.
8. Enter optional comments (500 character limit).
9. Select **Create & Next**.

A green disappearing notification displays, “User has been created.”

Permissions - Organizations must decide what each user has permission to do in the software.

- Use “Copy Permissions from” to choose permissions from previously entered user. Select **Apply**.

- Checking “Select all Permissions” box will check every single permission box.
- There are categories, sub-categories and individual permissions. Select the arrow icons to expand and collapse the categories and sub-categories.

At the bottom of the window are five buttons that can navigate through the new user window. Those buttons are **Back, Save, Save & Next, Next** and **Exit**.

NOTE: Users with non-administrative permissions in Axxess Home Care are restricted from adding employees with administrator roles to the system.

License & Compliance - Organizations can keep track of users licenses and compliance.

1. Select **New License/Compliance**.
2. Enter the License Number.
3. Choose the Type, Category and State.
4. Enter the Issue Date.
5. Choose Timeframe when Expire Date occurs.
6. Enter Expire Date.
7. Select **Browse**. Find the file on the computer and add any scanned documents to license/compliance.
8. Select the Alert User and/or Alert HR boxes then enter Alert Date.
9. Select **Save**.
 - a. Select **Edit** or **Delete** to make updates.

Pay Rates - See *Admin/Company Setup/Payroll/Pay Rates* for the functionality of sorting, viewing and updating rates.

1. Select **Copy Existing Rates** to duplicate rates from another user.
2. Choose an employee from “Copy Pay Rates from.”
3. Check the box to “Load employee (default) rates” or select bullets to load specific rates and/or load rates about specific payment sources or clients.
4. Select **Apply**.

Match Criteria - Organizations can determine how users are matched with clients. Select one or more boxes next to the user’s Skills, Transfers, Personality Traits, Pets and/or General criteria.

Availability - Enter the user's availability to work from a grid. The grid is split up by Workday, Shift and Hour. A selected square means the employee is available during that time.

- Select squares in the grid using the plus icon. The selected square turns green.
- Choose an Employee from "Load another employee's availability."
- Select **Load** to copy availability from another user.
- Select the **All** to select every square in the grid or select **Clear** to remove all.

Select **Exit** to leave the New User window.
Select **Yes** to add another worker or select **No** to exit.

Immunization - Enter the user's immunizations. Immunization lists can be exported to an Excel spreadsheet by selecting the **Export to Excel** button in the top right.


To add an immunization:

1. Select **Add Immunization**.
2. Choose type of immunization.
3. Choose who administered.
4. Enter administration date.
5. Select **Save & Close** for one or select the **Save & Add Another** to add another.

If a user declines an immunization:

1. Select **Decline/ Contraindicate Immunization**.
2. Choose Type.
3. Enter Documentation Date.
4. Indicate whether immunization was Declined or Contraindicated.
5. Select **Save & Close** for one or select the **Save & Add Another** to add another.

Select **Delete** or **Deactivate** to remove or inactivate.

NOTE: The  icon will show who and when a user made an edit in any window provided.

EDITING A USER

Admin/Lists/Users

The organization can make edits to all previously entered users (permissions based).

- Choose Status and start typing any information in Filter by Text to search for users.
- A new user can be added by selecting **New User**.
- Export list of all users to an Excel spreadsheet by selecting **Excel Export**.
- The total number of Active users will show at the bottom.
- Select **Delete** or **Edit** to make updates.

The edit user window is split into eight tabs. The only tab that was not previously shown in the new user steps (above) is the Emergency Contacts tab.

Emergency Contacts - Where user emergency contacts are managed.

To add a contact:

1. Select **Add Contact**.
2. Enter the emergency contact's information.
3. Check the box next to **Make Primary** to make the contact the employee's primary emergency contact. **NOTE:** Only one emergency contact can be marked as the primary contact.
4. **Edit, delete** and **Mark as Primary** by selecting the corresponding hyperlink and icons.

ADDING A PHYSICIAN

Admin/New/Physician or Admin/Lists/Physicians/New Physician

The quickest way to enter a physician is to enter their NPI number. As the number is typed, physicians appear in the menu below. After selecting a physician, the Physician Information and Address will auto-fill based on the NPI's registry information. This can still be edited. Everything with a red asterisk is required. **NOTE:** If the NPI number is unknown, use the following website:

<https://npiregistry.cms.hhs.gov/registry/>

The system will automatically do a PECOS verification if they are listed in the NPI registry. A green checkmark indicates that they are PECOS verified; a red "X" indicates they are not.

Add A New License

1. Select **Add License**.

2. Enter License Number.
3. Choose State.
4. Enter Issue and Expiration Date.
5. Add Attachments (only after the physician is saved).
6. Select **Save** or **Save & Add Another** for additional.

Select **Save** to complete the new physician.

ADDING A NEW FACILITY

Admin/New/Facility or Admin/Lists/Facility/New Facility

- Enter required information of Name, Address, City/Town, State, Postal Code, Country (auto-generates United States) and Primary Phone.
- Select **Save** to complete.

ADDING A NEW PHARMACY

Admin/New/Pharmacy or Admin/Lists/Pharmacies/New Pharmacy

- Enter required information of Name, City/Town, State, Postal Code, Country (auto-generates United States) and Primary Phone.
- Select **Save** to complete.

OASIS TRANSMISSION

View/OASIS Management/OASIS Ready for Export

Choose a Branch (if more than one), then select **Refresh** to filter for OASIS. A list of OASIS can be exported to Excel by selecting **Excel Export**.

Select one or more checkboxes, then choose one of the buttons down below. If **Generate OASIS File** is chosen, the system will download the raw OASIS file to be uploaded to the Center for Medicare and Medicaid Services (CMS). **NOTE:** Create a folder on the computer where OASIS files can be stored for easy access.

Once the OASIS file(s) is submitted, check the OASIS boxes that were sent and select **Mark Selected as Exported**. A confirmation window opens, then select **Yes**.

When the OASIS is completed, but will not be exported, check the box(es) and select **Mark Selected as Completed (Not Exported)**. A confirmation window will open, select **Yes**.

Select **Edit** to change the Correction number. A new window will open. Choose the Correction Number and select **Save**.

ORDERS MANAGEMENT

View/Orders Management


To view or enter order notes:

1. Select the  icon to enter comments for the corresponding order.
2. To enter a new note, select **Add Note**.
3. To update a note, select the  icon. To remove a note, select the **Resolve** hyperlink.

The note icon turns blue once a note has been entered. Hover over the blue note icon to view the notes entered. Up to three notes can be viewed when hovering over the icon. To view additional notes, select the note icon.

Orders are split into four sections:

Orders To Be Sent - This window houses orders that are ready to be sent to the physician for signature.

- Choose Delivery Method, Branch (if more than one) and Date Range, then start typing any Order number, Client, Type or Physician name to filter.
- Select the **Export** to export the list of orders.
- Select the  icon.
- Once printed, check the box by order and select **Mark as Sent**. A disappearing green notification will confirm they are marked as sent.
- Select more than one checkbox and then select **Bulk Print** to print more than one order at once.


Orders Pending Signature - This window houses orders that need to be “marked as signed” by the physician.

- Choose Delivery Method, Branch (if more than one) and Date Range, then start typing any Order number, Client, Type or Physician name to filter.

- Select **Receiver Order** hyperlink to electronically sign a single order.
- Check the boxes next to orders, then select the **Mark Selected as Received** button to sign multiple orders.
 - A new window will open. The physician will confirm the Received Date and Physician Signature Date (auto-populates today's date), then select **Mark**.

They will disappear from the Orders Pending Signature window and be in the Orders History section.

Orders History - This is where all orders in every status are housed.

- Choose a Delivery Method, Branch (if more than one) and Date Range to filter.
- Select **Export** to create an Excel spreadsheet of all orders in the window.
- Select the  icon for updates. A new window will open.
 - Option to adjust orders Sent, Received and/or Physician Signature Date.
 - Select **Update** to save.

Orders Pending Co-Signature - This is where orders are housed requiring a co-signature because the user who signed the order requires a co-signature (per their permissions).

- Choose Branch (if more than one) and Date Range, then start typing any Order number, Date, Client, MRN, Type, Physician, Clinician and/or Sign Date to filter.
- Select **Refresh** to reflect the most recent status of all orders.
- Select **Excel Export** to create an Excel spreadsheet of all orders in the window.
- Selecting the **Client** hyperlink goes to the client's chart.
- Select order **Type**. A new window will open, showing the printed version of the order.
 - There are five options (depending on permissions).
 - **Return** works identically to a QA clinician returning a task to the submitter.
 - **Download** will download a PDF version of the order on the computer.
 - Select **Co-Sign**. The co-signature window opens.
 - Enter co-signature.

- Choose to **Co-Sign** the order or **Co-Sign and Approve**.


Order will disappear from the Orders Pending RN Co-Signature window.

ADDING A PAYMENT SOURCE

Admin/New/Payment Source or Admin/Lists/Payment Sources/New Payment Source

New Payment Source window is split into five tabs:

Information - Entering general information about payment source.


1. Fill out the Information section. **NOTE:** Whichever Invoice Type is chosen will dictate which tabs will be available on the left.
2. Decide Billing Requirements.
3. Decide Billing Provider Information.
4. Enter Payer Information. **NOTE:** The information  icon is a reference. Hover over the icon for more insight about that question or section.
5. Enter person used to communicate with payment source.
6. Decide how authorizations will be set up.
7. Select **Save & Close** if a new payment source is complete or **Save** to continue.

NOTE: If all required information is not entered, the following disappearing notification will appear, "There was a problem validating your form, please review your information and try again". The required sections that are missing information will be highlighted in red.



UB-04 - Depending on how the insurance pays out, whether episodic or per visit, it will determine if this tab is active.

Fill out the Locator sections 31a through 81CCd and their corresponding dates.

For Additional Providers:

1. Select **Add Provider**. A line will appear in the Provider section.
 2. Choose the Qualifier, Locator Field and Value Source.
 3. If Providers need to be removed, select the  icon.
- Check box to map service providers at line-item level in ANSI file.
 - Check the box to create separate claims by rendering clinician.
 - Decide if mileage is billable.

For Additional Bill Rates:


1. Select **Add Bill Rate**. A new window will open.
2. Fill out the Add Visit Information form.
3. Select **Save & Exit** or select **Save & Add Another** for additional entries.
4. To edit previously entered Bill Rates, select the  icon or if they need to be removed, select the  icon.

Select **Previous** to get back or tap **Save & Close** to complete payment source.



HCFA - This tab will be active if the organization chose HCFA as the Invoice Type.

Decide if HCFA 1500 will be printed on a pre-print form. Enter/choose HCFA Locator specifications.

For Additional Providers:

1. Select **Add Provider**. A line will appear in the Provider section.
 2. Choose the Qualifier, Locator Field and Value Source.
 3. If Providers need to be removed, select the  icon.
- Check the box to create separate claims by rendering clinician.
 - Decide if mileage is billable.



For Additional Bill Rates:

1. Select **Add Bill Rate**. A new window will open.
2. Fill out the Add Visit Information form.
3. Select **Save & Exit** or select **Save & Add Another** for additional entries.
4. To edit previously entered Bill Rates, select the  icon or if they need to be removed, select the  icon.

Select **Previous** to get back or tap **Save & Close** to complete payment source.

Invoice - The last step tab enables organizations to set up payment sources that require an Invoice.

1. Choose Payment Terms.
2. Select the checkbox if the organization needs to add billing comments for each visit.

3. Select the checkbox if the organization wants to post payments through the Remittance Advice screen.
4. Enter Comments (150-character limit).
5. Decide if mileage is billable.
6. Select **Add Invoice Rate**.
 - a. Choose Task and Service Unit Type.
 - b. Enter Preferred Description and Rate.
 - c. Choose the Service Unit Type.
 - d. Enter Service Units per Visit.
 - e. Select **Save & Exit** to finish or select **Save & Add Another** for additional entries.
 - f. Select the  icon to make updates or select the  icon to remove.


EDITING AN EXISTING PAYMENT SOURCE

Admin/Lists/Payment Sources

- Start typing any part of the Name, Payer Type, Payer Category, Payer ID, Invoice Type, Phone or Contact Person to search for a payment source.
- Select **Edit** to make updates or select **Delete** to remove.

PAYROLL

Employees/Payroll

- Select a Branch (if more than one).
- Choose Late Tasks, Pay Period, Date Range, Task Status, Employee Type and Payroll Status.
- Select Columns by checking corresponding boxes. Selecting the green checkmark will select all statuses and selecting the red X will uncheck all choices.
- Search for employees by name.
- Sort employee tasks by client or date.
- Select collapse  icon to minimize the search window.
- Employees are grouped by name with a checkbox.
- Selecting the > icon will expand the list of payable items.
- Select the **Employee** checkbox to check all employee boxes and again to deselect all.

Top-Right Buttons:

1. Select **Export to** and select **Excel** to export the payroll list to an Excel spreadsheet.
2. Select the **Refresh** for search results based on parameters.
3. Select **Pay Period** to create a pay period. Dates auto-generate to after the newest created pay period.
 - Select **Create**. **NOTE:** The period cannot be removed once it has been generated.
4. Select **Help** to get more insight on Payroll setup.

Making Edits:

1. For previous pay periods, select the box(es) next to the client name.
2. Select **Edit Payroll** to make payroll edits.
3. Make updates to Actual Date/Time.
4. Select **Save** when done editing.

Finalizing Payroll:

1. Select an Employee checkbox.
2. Select **Finalize Payroll**.
3. Task updates with a green **F** next to the checkbox meaning the task details and rate have been locked.
4. If the employee was marked as Finalized but should not have, select the box next to their name.
 - Select **Un-Finalize Payroll**.
5. Select the same employee check box after being finalized.
6. Select **Mark as Paid**. The task then updates with a green **P** meaning the task has been paid.

REPORT CENTER

Reports/Report Center

This is where all Home Care reports are found. They are split up into five categories: Client, Billing/Financial, Employee, Annual Utilization Report, Electronic Visit Verification Reports, Survey Reports and Schedule Reports. Hovering over the report will show what the report entails, its Description, Parameters and what the Report Includes.


To run a report:

1. Select Parameters.
2. Select **Generate**.

- Select **Excel Export** to put the information into an Excel spreadsheet. Select **Reports Home** to go back to the list of all reports.

Requested Reports:

Some reports do not generate instantaneously; they must be requested.

1. Select the parameters.
2. Select **Request Report**.
3. Go to *Reports/Completed Reports*.
4. Search through the completed reports by typing the Name, Format, Status, Requested By, Started and/or Completed date.
5. Select report **Name** to view.
 - Select **Delete** hyperlink or check the box(es) then select **Delete** to remove. The refresh  icon is available or select **Refresh**.

ADDING TEMPLATES

Admin/New/Template

Templates can be used to save time for writing orders, goals, care plans, physician statements, narratives and other places inside visits.

1. Enter the Name.
2. Enter the Text (limited to 5000 characters).
3. Select **Save**.

LICENSE MANAGER

Employees/License Manager

A window will open that will show all current user licenses. Start typing an Employee, License Type, Number, Category, Issue Date, Expire and/or Software User to search. The total number of licenses displays at the bottom. To create a new license:

1. Select **New License/Compliance**.
2. Choose the Employee.
3. Enter the License Number.
4. Choose the License Type, Category and State.
5. Enter the Issue Date.

6. Choose the Timeframe when Expire Date Occurs.
7. Enter the Expire Date.
8. Select **Browse** to find the file on the computer and add any scanned documents to licenses.
9. Select the Alert User and/or Alert HR boxes then enter Alert Date.
10. Select **Save**.

Select  to edit or  to delete.

ADDING SUPPLIES

Admin/New/Supply

1. Enter the Description (required).
2. Enter the HCPCS.
3. Enter the Revenue Code.
4. Enter the Unit Cost.
5. Select **Save**.

ADDING ADJUSTMENT CODES

Admin/New/Adjustment Code

1. Enter the Code.
2. Enter the Description.
3. Choose from Negative or Positive Type.
4. Select **Save**.

ADDING DOCUMENT TYPES

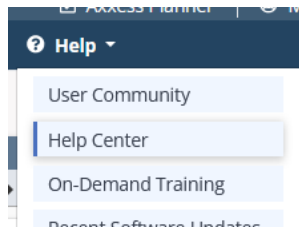
Admin/New/Document Type

1. Enter the Document Name.
2. Choose from a Client, Employee, Client & Employee or Payer category.
3. Select **Save**.

HELP CENTER

Help/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/>

