

HOME HEALTH ORDERS MANAGEMENT TRAINING MANUAL

August 2022

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ORDERS MANAGEMENT OVERVIEW

View/Orders Management

The Orders Management Center is where users can access sub-menus that include Orders Pending Co-Signature, Orders to be Sent, Orders Pending MD Signature and Orders History. Orders Management can be accessed through the menu bar.

ORDERS PENDING CO-SIGNATURE

View/Orders Management/Orders Pending Co-Signature

User permissions allow the organization to set up specific users to require co-signature on all orders. Once on the screen, the user can filter by Branch, Date Range and keyword. Select **Generate** once filters have been updated. The information can also be exported to Microsoft Excel for further analysis by selecting the **Export to Excel** button.



Order	Order Date	Patient	Type	Physician	Clinician	Sign Date
43984063	04/05/2021	JIMENEZ ANGELO	Physician Order	MEDEFF, LISA	Madal Jimenez RN	04/05/2021
44863592	03/03/2021	BOYLE, CHARLES	Physician Order	ABRAMS, JOHN	Stephanie Jacinto RN	03/03/2021

To complete the co-signature process, select the Type hyperlink. A PDF preview of the order will appear where there is an option to **Co-Sign**, **Print** or **Close**.

	Main Office 16000 Dallas Pkwy Suite 700 Dallas, TX 75248 Phone: (215) 327-2603 Fax: (214) 575-7711	Order#: 43984 Physician Order
Patient: JIMENEZ, ANGELO Spring Valley Plz WARDSON, TX 75080 Phone: (469) 4669	MRN: AJime1234 DOB: 12/14/1958	Physician: Medeff, Lisa MD 5425 Plano Parkway Plano, TX 75024 Phone: (972) 608-3333 Fax: NPI: 1104827799
Order To: Medeff, Lisa 5 Plano Parkway Plano, TX 75024 Phone: (972) 608-3333 NPI: 1104827799		Copy To(optional):
Order Date: 04/05/2021 Order #: 43984063		Episode Associated: 2/15/2021 - 4/15/2021
Effective Date: 04/05/2021 Time: 1:21 PM Primary: Wound Order		
Allergies: NKA (Food/Drugs/Latex/Environment)		
<input type="button" value="Co-Sign"/> <input type="button" value="Print"/> <input type="button" value="Close"/>		

After **Co-Sign** is selected, a confirmation box will appear. Enter the signature and signature date and select either **Co-Sign** or **Co-Sign and Approve**. If **Co-Sign** only is selected, the order will flow to the QA Center for approval. If **Co-Sign and Approve** is Selected, the order bypasses the QA center and gets approved.

Physician Order Co-Signature

Order Number: 43984063

Patient Name: JIMENEZ, ANGELO

Created Date: 04/05/2021

Clinician Co-Signature:

Clinician Co-Signature Date: 04/05/2021

ORDERS TO BE SENT

View/Orders Management/Orders to Be Sent

Once orders are approved, the Orders to Be Sent screen will populate the items ready to be sent to the physician either manually (fax, mail, deliver) or electronically through the Axxess (or physician) portal. Within the Order Sent screen, sort and filter by the below items:

- Branch - Filter by location/branch (if more than one).
- Date Range - Defaults to last 60 days from the current date. The date range may be changed. To refresh the orders displaying, select **Generate**.
- Delivery Method - Defaults to All. Choose between Axxess Portal, Fax and Mail.
- Status - Defaults to Active and Discharged (Non-Admission available). Select/multi-select applicable patient statuses.
- Search - Allows the user to search the table by any data listed.
- Export to Excel - This function allows the generated list to be exported to Excel for further analysis.

Orders To Be Sent

Branch: All Filter by: All

Date Range: 4/20/2021 To 6/18/2021

Status: Active Discharged Non-Admission

Start Timing

Order	Branch	Patient	Type	Physician	Delivery Method	Order Date	Notes
<input type="checkbox"/> 44853016	Location #	ZAMORA, KRISTAL	Physician Order	ABRAMS, JOHN M.D.	Electronic	06/17/2021	<input type="button" value="Print"/>
<input type="checkbox"/> 44847489	Main Office	PLUMB, ABBY B.	Physician Order	PERCE, DAWN D.O.	Axxess Physician Portal	06/17/2021	<input type="button" value="Print"/>

NOTE: When using the WorldView integration, users can send mail orders from the Orders to be Sent screen and track them on the Orders Pending MD Signature screen. This option is enabled in Company Setup/Integrations. Axxess will continue to transmit mail orders to WorldView when this selection is made. WorldView will refrain from mailing the orders an additional time.

Send Orders Electronically


Check the boxes to the left of the orders with a delivery method of Axxess Portal and select the **Send** button in the top right to mark orders as sent. A confirmation will appear in the top right-hand corner of the screen, confirming the orders were sent successfully. At this time, physicians who were set up to sign orders electronically will be able to access the Physician Portal to sign their orders (moved to the Orders Pending Signature sub-menu). The order is also updated to a **Sent to Physician (Electronically)** status in the patient chart.



Order	Branch	Patient	Type	Physician	Delivery Method	Order Date	Notes
<input checked="" type="checkbox"/> 44453010	Location II	ZAMORA, KRISTAL	Physician Order	AIRRAMS, JOHN M.D.	Electronic	06/17/2021	
<input type="checkbox"/> 44447488	Main Office	PLUMB, ARRY B	Physician Order	PERCE, DWAN D.O.	Axxess Physician Portal	06/17/2021	

NOTE: When the WorldView integration is enabled, all orders with Mail or Fax selected in the Delivery Method field will be sent to WorldView to send to physicians. Administrators should make sure the most up-to-date physician mailing addresses and fax numbers are saved on the Edit Physician screen.

Send Orders Manually

Physicians who have not agreed to receive their orders electronically must filter for the Delivery Method of Mail or Fax. To view the order in PDF format, select the printer  icon. From this window, the order can be printed. Once printed, check orders to send manually on the left and select the button in the top right to **Send**. Once marked as sent, the orders move to the Orders Pending Signature sub-menu. The order is also updated to **Sent to Physician (Manually)** status in the patient chart.

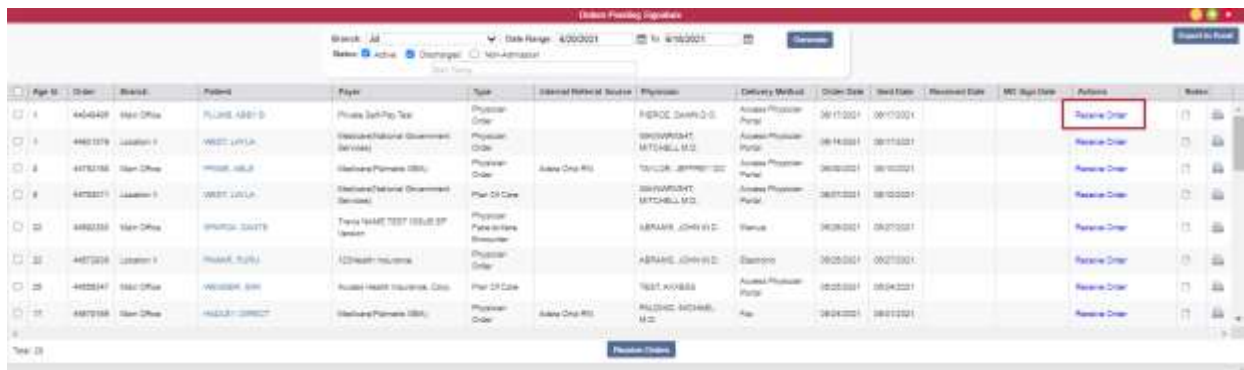
ORDERS PENDING MD SIGNATURE

View/Orders Management/Orders Pending MD Signature

To track outstanding orders previously sent to the physician or to mark an order as received and/or signed, access Orders Pending MD Signature. Within the Orders Pending MD Signature screen, sort and filter by the below items:

- Branch - Filter by location/branch (if more than one).
- Date Range - Defaults to last 60 days from the current date. The date range may be changed. To refresh the orders displaying select **Generate**.
- Status - Defaults to Active and Discharged (Non-Admission available). Select/multi-select applicable patient status.
- Search - Allows the user to search the table by any data listed.
- Export to Excel - This function allows the generated list to be exported to excel for further analysis.

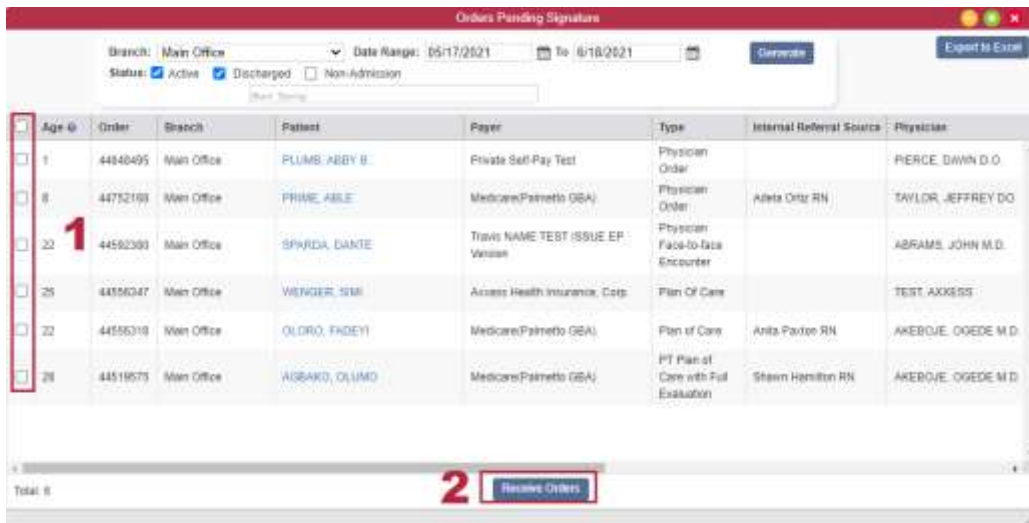
There are two ways to mark an order as received with signature. Individual orders can be marked Received by locating the order that has been returned signed by the physician. Once found, select the **Receive Order** action button in the far right-hand column.



The Received Date and MD Sign Date will open to fill out with the appropriate dates. Then select the **Update** hyperlink.

Order Date	Sent Date	Received Date	MD Sign Date	Actions
06/17/2021	06/17/2021	06/18/2021		Update Cancel

Select multiple orders at one time to mark as received. Choose the applicable orders on the far left-hand side and select **Receive Orders** at the bottom of the screen.



Age	Order	Branch	Patient	Payer	Type	Internal Referral Source	Physician
1	44840495	Main Office	PLUMB, ABBY B.	Private Self-Pay Test	Physician Order		PIERCE, DAWN D.O.
8	44752199	Wen Office	PRIME, ABLE	Medicare/Patnetto (GA)	Physician Order	Albeta Ortiz RN	TAYLOR, JEFFREY DO
22	44562390	Main Office	SPARDA, DANTE	Travis NAME TEST (ISSUE EP - Vision)	Physician Face-to-face Encounter		ABRAMS, JOHN M.D.
25	44550247	Main Office	WENGER, SIMI	Access Health Insurance, Corp.	Plan Of Care		TEST, AXXESS
22	44555318	Wen Office	OLDRO, FHOEYI	Medicare/Patnetto (GA)	Plan of Care	Anita Paxton RN	AKEDJOE, OGOEDE M.D.
28	44519573	Main Office	AGBAKO, OLUMO	Medicare/Patnetto (GA)	PT Plan of Care with Full Evaluation	Shawn Hamilton RN	AKEDJOE, OGOEDE M.D.

A pop-up will display to confirm the Received Date and Physician Signature Date. Select the **Mark as Received** button.



Are you sure you want to mark the selected orders as received? This will override the existing received and signature dates.

Received Date: 06/18/2021

Physician Signature Date: 06/18/2021

Mark as Received Cancel

Once an order is marked as Received, it moves to the Order History screen. The order will also be updated in the patient chart to indicate Returned W/Physician Signature.

Physician Order	06/17/2020	Sherilyn Smith RN	Returned W/Physician Signature
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ORDERS HISTORY

View/Orders Management/Orders History

Shows a complete list of received and outstanding orders. Within the Orders History screen, sort and filter by the below items:

- Branch - Filter by location/branch (if more than one).
- Date Range - Defaults to last 60 days from the current date. The date range may be changed. To refresh the orders displaying, select **Generate**.

- Status - Defaults to Active and Discharged (Non-Admission available). Select/multi-select applicable patient status.
- Export to Excel - This function allows the generated list to be exported to Excel for further analysis.



Order	Patient	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date
44763071	WEST, LAYLA	Plan Of Care	WAINWRIGHT, MITCHELL M.D.	Axxess Physician Portal	05/07/2021	05/10/2021	
44738493	AARON, BOB	Physician Face-to-face Encounter	GRANT, ALLEN M.D.	Manual	05/04/2021	05/08/2021	05/08/2021
44881375	HIRPARA, KATY M.	Physician Order	HIRPARA, DIVYESH M.D.	Axxess Physician Portal	05/03/2021	05/03/2021	05/03/2021
44885728	SMITH, SAMANTHA	Physician Face-to-face Encounter	SMITH, ALLISON MD	Manual	05/03/2021		
44898064	KIM, SEOKJUN	Plan Of Care	KRABS, EUGENE		05/01/2021	05/02/2021	05/08/2021
44899957	MOCZY, TIFF M.	Physician Order	MOCZY, TIFFANY R. NP	Axxess Physician Portal	05/20/2021	05/17/2021	05/17/2021

If the order Received Date or MD Sign Date were entered incorrectly, corrections can be made by selecting the **Edit** hyperlink in the Action column. Upon selection, a pop-up window appears, allowing updates to one or all the dates. Select **Update** to save the changes and **Exit** to delete any changes.

Received Date	MD Sign Date	Received By	Action
06/08/2021	06/08/2021	Piyush Piyush RN	Edit
06/17/2021	06/16/2021	Tiffany Moczygemba RN	Edit



Update Physician Order

Sent Date:


Received Date:

Physician Signature Date:

[Update](#) [Exit](#)

ORDERS MANAGEMENT NOTES



To view or enter order notes, navigate to the **View** tab and hover over **Orders Management**. Select **Orders to Be Sent**, **Orders Pending MD Signature**, or **Orders History**. A new Notes column appears on each of these screens.



Select the note icon  in the **Notes** column to enter notes for the corresponding order. The note icon turns blue once a note has been entered.

Order History											
Branch: All		Date Range: 5/2/2021 to 6/30/2021		Generate		Export to Excel					
Status: <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Discharged <input type="checkbox"/> Non-Admission											
Order	Patient	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Received By	Action	Notes
44847488	PLUMB, ABBY B.	Physician Order	PIERCE, DAWN D.O.	Axxess Physician Portal	06/17/2021	06/24/2021	06/24/2021	06/24/2021		Edit	
44845495	PLUMB, ABBY B.	Physician Order	PIERCE, DAWN D.O.	Axxess Physician Portal	06/17/2021	06/17/2021	06/18/2021	06/18/2021		Edit	

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.

Order	Patient	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Received By	Action	Notes
44728450	AARON, BOB	Physician Face-to-Face Encounter	GRAFF, ALLEN M.D.	Manual	06/04/2021	06/08/2021	06/08/2021	06/08/2021		Edit	
44001375	HIPPWA, KATY M.	Physician Order	HIPPWA, DIVYESH M.D.	Axxess Physician Portal	06/03/2021	06/03/2021	06/03/2021	06/03/2021	Sal Castro RN	Edit	
44065887	TESTTTT, ANISH	Physician Order	JOHN, AARONS	Axxess Physician Portal	06/03/2021	06/24/2021	06/24/2021	06/24/2021		Edit	
44666726	SMITH, SAMANTHA	Physician Face-to-Face Encounter	SMITH, ALISON MD	Manual	06/03/2021					Edit	
44020832	TESTTTT, ANISH	Physician Order	JOHN, AARONS	Axxess Physician Portal	06/02/2021	06/24/2021	06/24/2021	06/24/2021		Edit	

To enter a new note, type in the text box and select **Add Note**. To edit a note, select the edit  icon. To delete a note, select the delete icon . Users must have permission to delete notes.

Pierce, LaDawn RN  

Last Modified: 06/24/2021

PCP out on vacation until 7/6/21

Created: 06/24/2021

Add Note
Close

HELP CENTER

A great resource available any time, any day is our Help Center. Get answers to frequently asked questions and watch tutorial videos on all our Axxess products. Our Help Center can be accessed by going to *Help/Help Center* or <https://www.axxess.com/help/>

