

HOME CARE CLINICIAN TRAINING MANUAL

December 2022

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LOGGING IN

Go to www.axxess.com and select the **LOGIN** button.



Enter the user's email and select **Next**. Once entered, enter the password and select the **Secure Login** button.



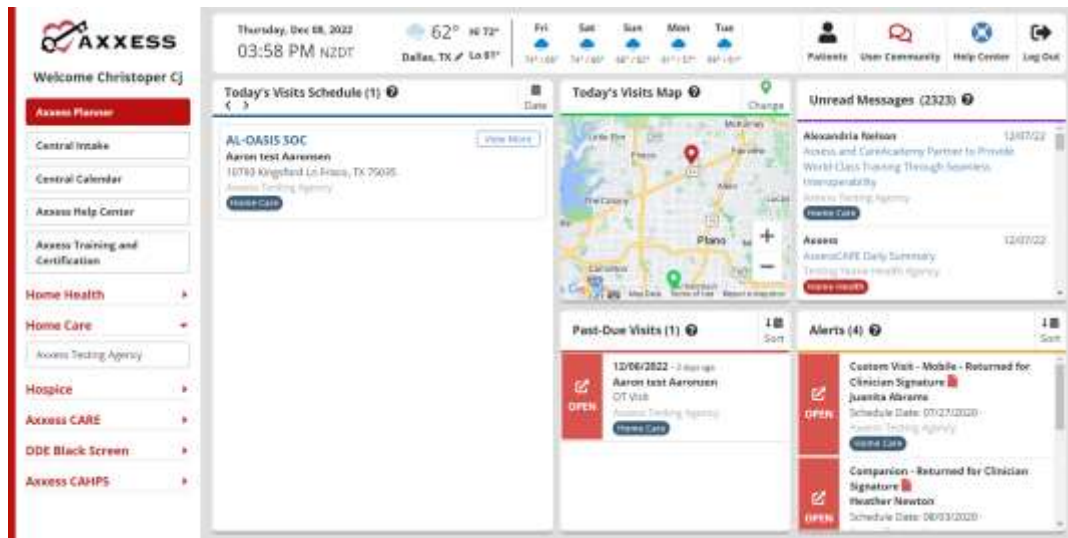
The username is the email address assigned to the user's account when it was created. The password was created by the user, from a link that was sent to this email address. This password will also be the user's electronic signature.

If the user forgets their password, select **Having trouble logging in?** and a link will be sent to this email address. The user will be able to reset their password, however, the electronic signature will remain the same (resetting signature will be covered later). After the correct username and password have been entered, the following message will display:



Select **OK** and the user will see the Axxess Planner.

AXXESS PLANNER



- Date/Time/Weather - today's date, time and five-day weather forecast for the user's specific area.
- Today's Visits Schedule - calendar that shows the user's visit schedule (red dots on the dates the user has visits).
 - Selecting the day will bring up the tasks schedule. Selecting the Task will show the status of the visit. Then select the client's name to go directly to the client's Chart.
- Today's Visits Map - view directions for the users' daily visits or plan out their route.

Green - current location

Red - visit location

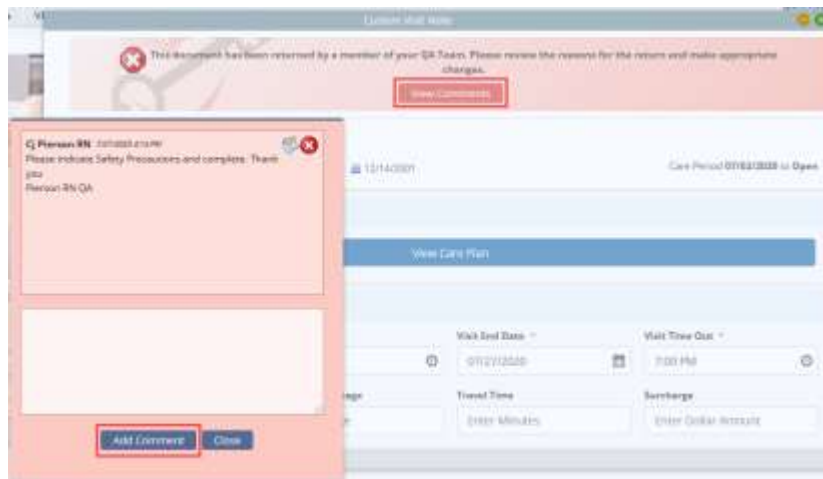
Blue - selected visit

Select the marker to view the details of the visit.



Select **Get Directions** and this will take the user to Google Maps, giving step by step list of directions and the visual map.

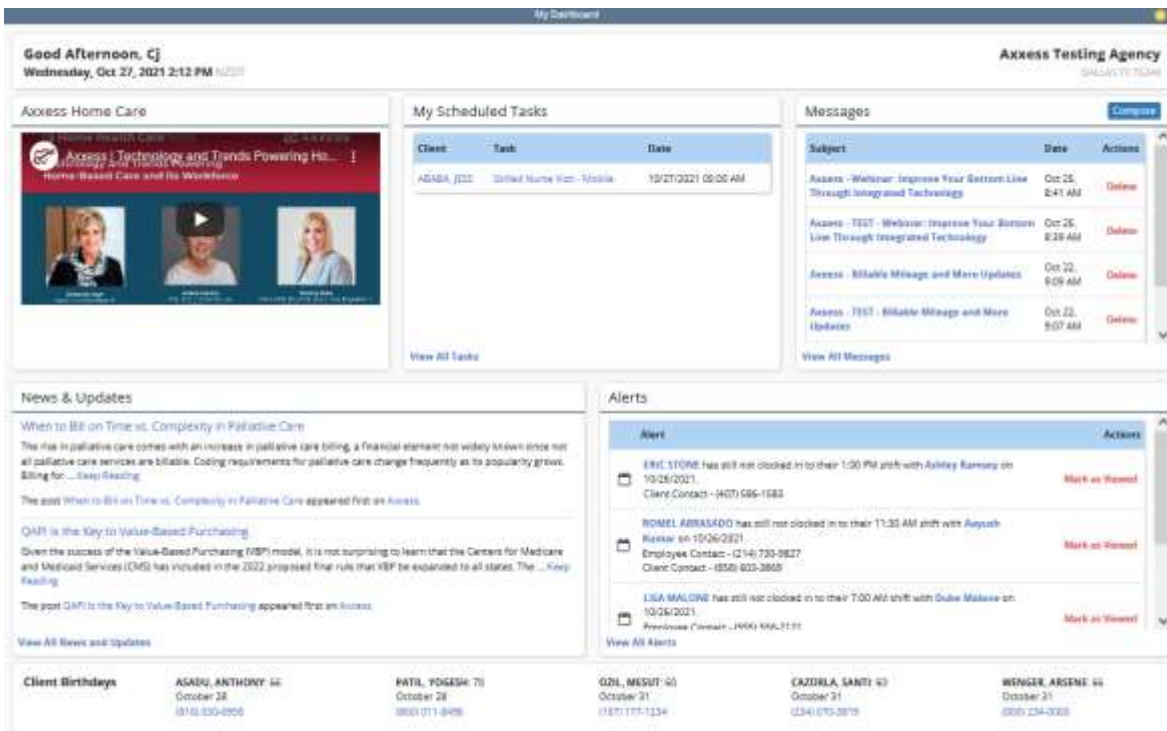
- Unread Messages - A list of unread messages from the Internal Messaging Center. Selecting a message will take the user directly to the messaging center.
- Past-Due Visits - A list of visits from the last 21 days that have not been completed and signed.
 - Selecting the red **OPEN** tab on the left-hand side of the visit will show the note and allow users to view the chart. The visits list from oldest to newest and can be sorted to reverse the order from newest to oldest.
- Alerts - A list of all visits/tasks that have been returned to the user from the QA Center.
 - Hover over the red sticky note to view comments from QA.
 - Select the orange **OPEN** tab to chart on the note/visit.
 - Inside the note, a message will be displayed that the document has been returned by QA. Select **View Comments** to read the message and send back any response.



On the left side of screen is a list of organizations that the user works with, as well as multiple products their organization subscribes to.

DASHBOARD

Opens upon log in. Below are the six tiles for all clinicians:



The screenshot shows a user dashboard for 'Axxess Testing Agency'. It features several key sections:

- Welcome Panel:** Greeting 'Good Afternoon, CJ' and 'Wednesday, Oct 27, 2021 2:12 PM'. Includes a video player for 'Access Technology and Trends Powering Home-Based Care and Its Workforce'.
- My Scheduled Tasks:** A table with columns for Client, Task, and Date. One task is listed: ADADA, JESS - Dotted Nurse Visit - Mobile, 10/27/2021 09:00 AM.
- Messages:** A list of messages with columns for Subject, Date, and Actions. Messages include newsletters and updates.
- News & Updates:** Links to articles such as 'When to Bill on Time vs. Complexity in Palliative Care' and 'QAPI is the Key to Value-Based Purchasing'.
- Alerts:** A list of alerts for staff members like ERIC STONE, ROMEL ABRASADO, and LISA MALOWE, indicating they are not clocked in for their shifts.
- Client Birthdays:** A row of client birthday reminders for ASARI, ANTHONY; PATIL, YOGESH; GZIL, MESUT; CAJDRILA, SANTI; and WENGER, ARSENE.

1. Welcome Panel - Items for subscribers to Axxess products. These will include items such as important announcements and training videos.
2. My Scheduled Tasks - Electronic “To-Do” list. Users can quickly access a client chart and/or tasks for the first five clients on their to-do list.
3. Messages - HIPAA-compliant messaging center, allowing all users to communicate in a secure manner. When the user receives messages, notifications will be sent to the user’s email assigned to their account.
4. News & Updates - Links to Axxess generated blog posts, educational articles, regulatory updates and other important information.
5. Alerts - Provides direct access to important alerts.
6. Client Birthdays - This is a quick reminder of the clients who will celebrate birthdays in the upcoming week/month.

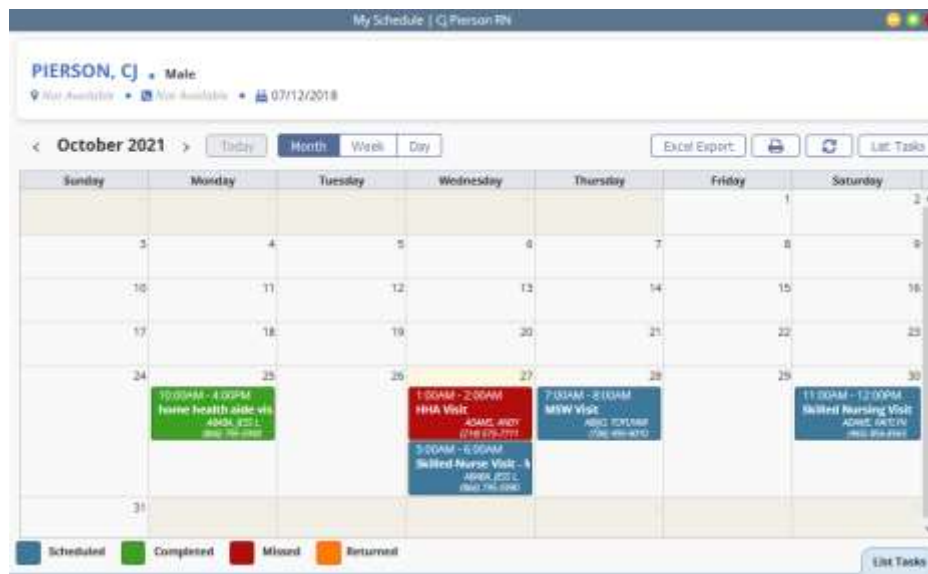
My Scheduled Tasks

Select the **View All Tasks** hyperlink in the bottom left corner of the tile to view the entire list of scheduled tasks.



Client	Task	Date
ABADA, JESS	Skilled Nurse Visit - Mobile	10/27/2021 05:00 AM
ADAMS, ANDY	HHA Visit	10/27/2021 01:00 AM
ABIJO, TOFUNMI	MSW Visit	10/28/2021 07:00 AM
ADAMS, KAITLYN	Skilled Nursing Visit	10/30/2021 11:00 AM

[View All Tasks](#)



My Schedule | Q. Pierson RN



PIERSON, CJ • Male
 Not Available • Not Available • 07/12/2018

< October 2021 > Today Month Week Day Excel Export Print Refresh List Tasks

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25 3:00PM - 4:00PM Home Health Aide Visit ABADA, JESS 10/27/2021	26	27 1:00PM - 2:00PM HHA Visit ADAMS, ANDY 10/27/2021 5:00AM - 6:00AM Skilled Nurse Visit - Mobile ABADA, JESS 10/27/2021	28 7:00AM - 8:00AM MSW Visit ABIJO, TOFUNMI 10/28/2021	29	30 11:00AM - 12:00PM Skilled Nursing Visit ADAMS, KAITLYN 10/30/2021
31						

■ Scheduled
 ■ Completed
 ■ Missed
 ■ Returned






List Tasks


- View the calendar by **Month, Week** or **Day**.
- Export the data into a spreadsheet by selecting the **Excel Export** button.
- Print the calendar by selecting the  icon.
- Refresh the page by selecting the  icon.

Tasks will show in four different colors:

■ Scheduled
 ■ Completed
 ■ Missed
 ■ Returned

Hovering over a task will give the following options:





- Edit Document  - Jumps straight into documentation for the client.
- Print - Displays the print view of the document. From here, the document may be downloaded or printed.
- Missed Visit Form  - see below.
- Edit Scheduled Date/Time  - Update the date and time of the task.
- Reassign  - Assign the task to another user.
- Delete  - Remove the task entirely.

See the tasks in a list by selecting the **List Tasks** button at the top right or the **List Tasks** tab on the bottom right. Selecting the  button will give users the same functionality as hovering in the calendar view.



Task	Payment Source	Start Time	End Time	Client	Status	Action
Home health aide visit	Private (Self) Pay	10/25/21 10:00 AM	10/25/21 4:00 PM	ABABA, JESS L.	Submitted Pending Co-Signature	  
MHA Visit	Medicaid-HCFA 1500	10/27/21 1:00 AM	10/27/21 2:00 AM	ADAMS, ANDY	Missed Visit (Pending)	 
Skilled nurse visit - Mobile	Bob's Invoice	10/27/21 5:00 AM	10/27/21 6:00 AM	ABABA, JESS L.	Not Yet Due	  
MDW Visit	Private (Self) Pay	10/28/21 7:00 AM	10/28/21 8:00 AM	ABJO, TOFUNMI	Not Yet Due	 
Skilled nursing visit	Private (Self) Pay	10/30/21 11:00 AM	10/30/21 12:00 PM	ADAMS, KATLYN	Not Yet Due	 

Sticky Notes:

-  Orange - Return Reason from either QA Center or another clinician.
-  Yellow - A note pertaining specifically to this visit, that communicates to other users.
-  Red - Missed visit.
-  Blue - A note that has information for every visit in a care period (ex. A gate code or where to park). This information will appear in a sticky note on every visit in that care period.

Missed Visit Form - Select the Missed Visit Form icon, and a window will pop up, asking whether an order was generated, physician office notified, tracking type, reason, comments, and the user's signature and date. Then select the **Submit** button. Once submitted, the visit will turn red.

Missed Visit Details * = Required Field

Client	ABABA, JESS L.	Order Generated	▼
Type of Visit	Skilled Nurse Visit - Mobile	Physician Office Notified	▼
Date of Visit	10/27/2021	Tracking Type	— Select Tracking Type — *
Comments		Reason	— Select Reason — *


Attachments

Use the upload fields below to upload files associated with this missed visit.

Browse... No file selected.

Browse... No file selected.

Browse... No file selected.

Hovering over the missed visit will allow you to Restore  if mistakenly missed.

EDIT PROFILE

Home/My Account/Edit Profile

Login Password

Current Password

New Password

Confirm New Password

Electronic Signature

Current Signature

New Signature

Confirm New Signature

Address

Country Select Country *

Address Line 1 Street and number, P.O. box, c/o *

Address Line 2 Apartment, suite, unit, building, fl.

City/Town *

Postal Code -

Primary Phone

Home ▼ 1 Enter Phone Number

[Add Alternate Number](#)

Fax Number

1 Enter Fax Number

Save
Close

If the user knows their current password and/or signature, they can come to this screen and update it with new information. If they do not remember their current signature, they will have to reset their signature.

RESET SIGNATURE

Home/My Account/Reset Signature



When users select the **Reset Signature** button, a link will be sent to the email address listed in the message, allowing them to create a new signature.

CLIENT CENTER

Clients/Client Center



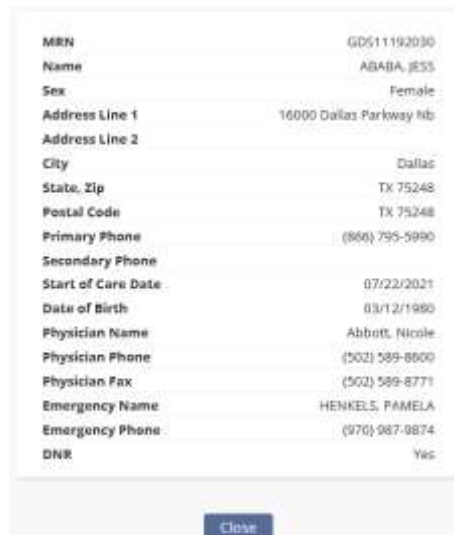
Filter by:

- Branch - Choose the branch (if more than one)
- Status - Status of the client (Active, Discharge, Pending, Non-Admit, Hospitalized)
- Type - Medical or Non-Medical
- Payer - Payment source
- Tags - Free text to type in search based off organization groupings

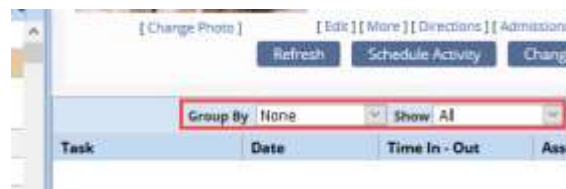
- Find - Free text to type part of a client's name



Client's snapshot at the top of the screen gives a quick view of the client's demographics. Select the **More** hyperlink to view the client's address, phone number, physician contact info and emergency contact.

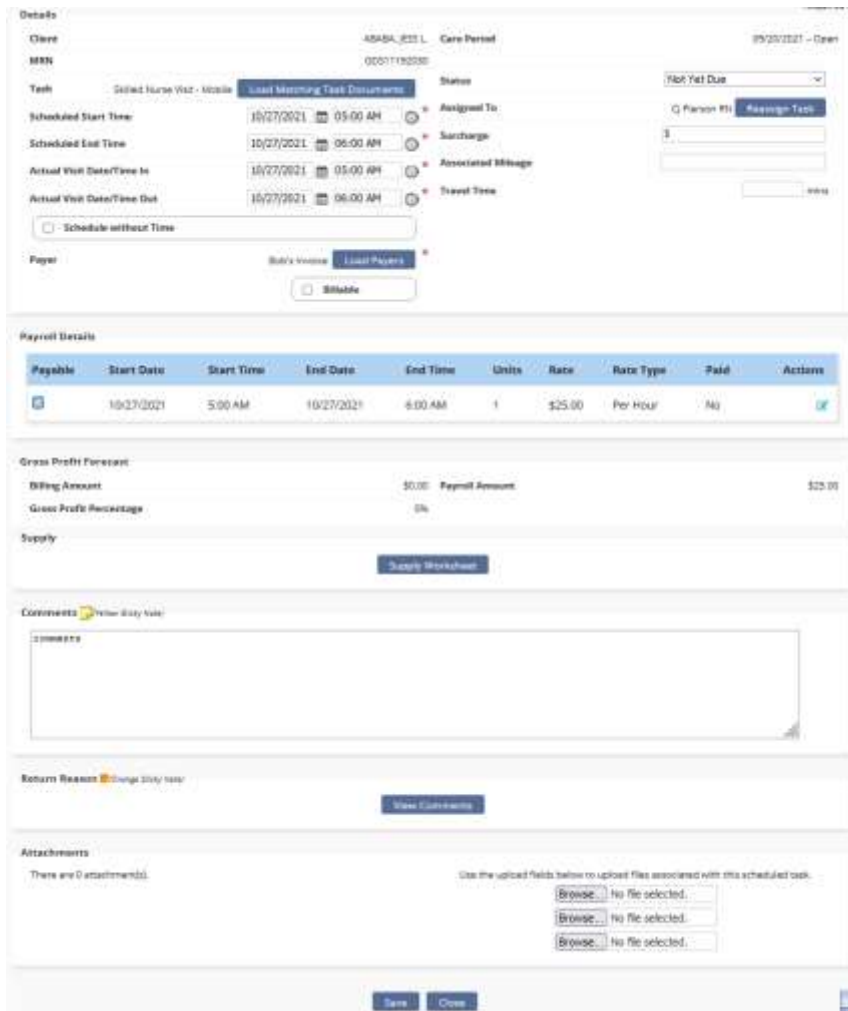


A list of tasks in the current care period will display at the bottom of the screen. Filter by "Group By" and "Show" drop-down menus to change viewing parameters.



Select the task/note and start charting if they are not complete. Select the blue triangle under the Actions column to allow viewing of the details.

TASK DETAILS



Details

Client: 45454_233 L Care Period: 09/29/2021 - Open
 MRN: 0001130230
 Teeth: Deleted Nurse Visit - Mobile **Load Matching Task Discontinues**
 Status: Not Yet Due
 Assigned To: Q Person #1 **Reassign Task**
 Scheduled Start Time: 10/27/2021 05:00 AM
 Scheduled End Time: 10/27/2021 06:00 AM
 Actual Visit Date/Time In: 10/27/2021 05:00 AM
 Actual Visit Date/Time Out: 10/27/2021 06:00 AM
 Surcharges: 1
 Associated Message:
 Saved Time:
 Schedule without Time
 Payer: Sub's Invoice **Load Payers**
 Billable

Payroll Details

Payable	Start Date	Start Time	End Date	End Time	Units	Rate	Rate Type	Paid	Actions
<input type="checkbox"/>	10/27/2021	5:00 AM	10/27/2021	6:00 AM	1	\$25.00	Per Hour	No	

Gross Profit Forecast

Billing Amount: \$0.00 Payroll Amount: \$25.00
 Gross Profit Percentage: 0%

Supply

Comments View Daily Note
 Comments

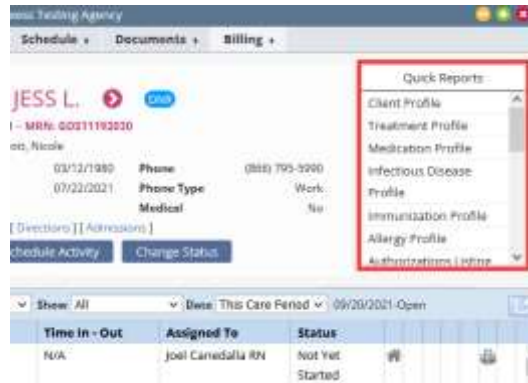
Return Reason Change Daily Note

Attachments
 There are 0 attachments.
 Use the upload fields below to upload files associated with this scheduled task.
 No file selected.
 No file selected.
 No file selected.

- Scheduled Start and End Time - The date the task was scheduled on the calendar.
- Actual Visit Date/Time In and Out - The date/time the task was completed. This is pulling from the task completed by the clinician.
- Assigned to - The clinician that is currently assigned to this task.
- Payer - The payment source for the task can be changed by selecting the **Load Payers** button.

- Comments (Yellow Sticky Note) - Any notes that pertain to this specific visit and are needed to communicate with other users within the organization.

QUICK REPORTS



NOTE: The following quick reports are permissions-based.

Client Profile

PDF print out of the client information taken at admission.



Treatment Profile



The screenshot shows a 'Treatment Profile' window for a client named ABABA, JES. It displays two tables: 'Active Treatment(s)' and 'Discontinued Treatment(s)'. The active treatments table has two entries for 'Aspiration' with start dates 07/01/2021 and 09/28/2021. The discontinued treatments table is empty, showing 'No Discontinued Treatments'.

Start Date	Treatment	Description	Frequency	D/C Date	Action
07/01/2021	Aspiration	Aspiration Precautions at all times. HOB Elevated 30 degrees with feeding and 30 minutes AFTER feeding. Suction equipment with Patient at all times.	PRN		[Action]
09/28/2021	Aspiration	Aspiration Precautions at all times. HOB Elevated 30 degrees with feeding and 30 minutes AFTER feeding. Suction equipment with Patient at all times.	Twice/dly		[Action]

The Treatment Profile houses all treatments the client is receiving. The list is split into Active and Discontinued Treatment(s). Add a new treatment by selecting the **Add Treatment** button.



The 'Add Treatment' form includes fields for Start Date, End Date, Treatment (a dropdown menu), Description (a text area), and Frequency (a dropdown menu). It also has 'Save & Close' and 'Exit' buttons at the bottom.

Enter the start date and end date. Choose the treatment from the drop-down menu. Users with the necessary permissions can add new treatments. Enter a description in the free text space and choose the frequency from the drop-down menu. Select the **Save & Close** button when finished.

Select the **Print Treatment Profile** button to see a printable view of the treatment profile. Select the **Refresh Treatments** button to bring the profile list up to date. Select the **Reorder Treatments** button to change the order of treatments.

Reorder Treatments

Aspiration

CPT Visit Treatment

Save Close

Select the arrow to either move a treatment up or down the list. Select the **Save** button when finished. There are options under the Action column to either **Edit**, **Discontinue** or **Delete** treatments. Select the Action button and choose **Activate** to move a discontinued treatment into the Active Treatment(s) list.

Medication Profile

Medication Profile | ADAMA, #355

Medication Profile

Client: ADAMA, #355 Primary Diagnosis: N15.0 - Bulimic neuropathy
 Current Care Period: 09/20/2021 - Ongoing Secondary Diagnosis: C01 - Malignant neoplasm of base of tongue
 Allergies: ischus Pharmacy Name: Pharmacy Phone:

Active Medication(s)									
LS	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy	D/C Date	Action	
<input type="checkbox"/>		ADAMIN Three times/day By mouth (PO)	R	analgesic	Steff, Kenneth ALC	CVS 1224 Teasley Lane, DENVER		<input type="button" value="Down Arrow"/>	<input type="button" value="Up Arrow"/>
<input type="checkbox"/>		PARACETAMOL 3 By mouth (PO)	R	central nervous system agents				<input type="button" value="Down Arrow"/>	<input type="button" value="Up Arrow"/>
<input type="checkbox"/>		alut alut oral	R	oFVs				<input type="button" value="Down Arrow"/>	<input type="button" value="Up Arrow"/>

Discontinued Medication(s)									
LS	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy	D/C Date	Discontinue Reason	Action
<input type="checkbox"/>		TYLENOL 325 MG ORAL CAPSULE tablet tablet	R	central nervous system agents			09/14/2021 12:00 AM	NA	<input type="button" value="Down Arrow"/>
<input type="checkbox"/>	12/01/2021	PREGNOLONE 10 MG ORAL TABLET, DISINTEGRATING 1 a daily By mouth (PO)	R	adrenal cortical steroids	Khatami, Jonathan OO	CVS SALLAS	10/15/2021 12:00 AM	NA	<input type="button" value="Down Arrow"/>

Add Medication:

New Medication

Long Standing

Start Date:

Discontinue Through Date:

Medication & Dosage: Start Typing

(Search for Medication is required to include medication in drug interactions check.)

Classification:

Frequency:

Route: Start Typing

Type: New

Physician: Start Typing

Pharmacy: Start Typing

- Long Standing - Has the client been taking medication for an extended period?
- Start Date - Enter or select the calendar icon to choose a date.
- D/C Through Date - Enter or select the calendar icon to choose a date.
- Medication and Dosage - Begin typing the description of the medication, then select **Search for Medication**. A drop-down menu will appear with all the medications that are listed in the software. Medications not listed can be added. However, only medications selected from the drop-down box will be checked for drug interactions.
- Classification - If a medication from the database is entered, this area will give suggested classifications.
- Frequency - Can be written out entirely or with medical shorthand.
- Route - Free text.
- Type - Whether new, changed or unchanged.
- Amount – Example: one tab, one puff, one pump.
- Physician - Start typing the name of the physician and a drop-down menu will appear with related physicians.
- Pharmacy - Start typing the name of the pharmacy and a drop-down menu will appear with related pharmacies.
- Select **Save & Exit**.

Decide whether the new medication should **Create Order**. If there are more medications to enter, select **Add Another Medication** if not, select the **Close** button.

Once a medication is added, it will appear on the active medications list. **Edit**, **Delete** or **Discontinue** this medication by hovering over the Action triangle on the right-hand side of the medication.



Check for Drug Interactions:

1. Select the **Drug Interactions** red button at the top of the screen.

2. Select the box next to the medication.
3. Select **Check Interactions** and a PDF will generate called Drug-Drug Interactions.

Instructions

Please select the medications below that you will like to check for interactions and click on the 'Check Interactions' button.

Grayed out medications have not been selected from the medication database and therefore are excluded from the drug interaction check.

Medication & Dosage		Frequency	Route	Classification
<input type="checkbox"/>	aspirin	aspirin	aspirin	aspirin
<input checked="" type="checkbox"/>	ASPIRIN	Three times/day	By mouth (PO)	analgesics
<input checked="" type="checkbox"/>	PARACETAMOL	2	By mouth (PO)	central nervous system agents

Once any updates are made to the medication profile, it will need to be signed. Select **Sign Medication Profile** in the upper left. A window will pop up with the Medication Profile, allowing users to enter their signature and date.

Medication Profile Snapshot

Client Name: Physician:
 Care Period Associated: Pharmacy:
 Primary Diagnosis:
 Secondary Diagnosis:

Allergies

Medications						
LE	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy
<input checked="" type="checkbox"/>		ASPIRIN	R	analgesics	Star, Kenneth ATC	CS 1224 Teskey Lane, DENTON
<input checked="" type="checkbox"/>		PARACETAMOL	R	central nervous system agents		
<input type="checkbox"/>		aspirin	R	aspirin		

Signatures

(Drug Regimen Review Acknowledgment) I have reviewed all the listed medications for potential adverse effects, drug reactions, including ineffective drug therapy, significant side effects, significant drug interactions, duplicate drug therapy, and noncompliance with drug therapy.

Clinician Signature: Date:

To view any prior signed medication profiles, select **Signed Medication Profiles**. Select the printer icon to view and/or print the signed Medication Profile or select the **Edit** or **Delete** hyperlinks to make updates.

Signed Medication Profiles ABABA, JESS L.		
Signed By	Signed Date	Action
CJ Pierson RN	10/28/2021	Edit Delete
Eric Stone RN	10/12/2021	Edit Delete

Infectious Disease Profile

The Infectious Disease Profile is designed to help organizations easily track infectious diseases and screening tools used to detect them. Infectious disease screenings that have been completed are listed in the Infectious Disease Profile with the following details:

- Users who completed the screening
- Person screened and their name
- Type of screening completed
- Date of the screening
- Screening results

Search through the list of screenings by using the Filter by Text bar. Select the **View** hyperlink to display the results. Select the **Infection Log** button for a direct link to the Infection Log.

Screenings								
Filter by Text				Add COVID-19 Screening		Infection Log		
Entered By	Person Screened	Name of Person Screened	Type of Screening	Date of Screening	Risk Level	Screening Results	Temperature	Actions
Pierson, CJ RN	Client	ABABA, JESS L.	COVID-19	10/28/2021	High	Yes-1/4 questions	98	View
Stone, Eric RN	Client	ABABA, JESS L.	COVID-19	10/12/2021	Low	Yes-0/4 questions	98.6	View
Ndu, Sunday RN	Client	ABABA, JESS L.	COVID-19	07/05/2021	High	Yes-1/4 questions	N/A	View

Select the **Add COVID-19 Screening** button to add a new screening. Indicate the person screened and input their reported temperature. Complete the screening questions and assign a risk level based on your organization's policy. Additional screening requirements may also be entered including templates based on your organization's policy. Click the screening acknowledgement and enter the date and time of the screening. Enter the signature and select the **Sign Screening** button to complete or select the **Save & Add Another** button to document additional screenings.

COVID-19 Screening

Complete the following screening questions and select a risk level for the client and/or household members based on your organization's policies and procedures.

Person Screened * Refused Screening

Based on state requirements and organizational policies, request the screened person's temperature before performing visits. Enter the reported temperature in Fahrenheit. The temperature you enter will populate in the Infectious Disease Screening report.

Reported Temperature (°F)

Have you traveled internationally within the last 14 days to a country with sustained community transmission? *

Yes No

Do you have signs or symptoms of COVID-19, such as fever, chills, cough, shortness of breath, difficulty breathing, fatigue, muscle or body aches, headache, new loss of taste or smell, sore throat, congestion, runny nose, nausea, vomiting or diarrhea? *

Yes No

In the last 14 days, have you had contact with someone diagnosed with COVID-19, under investigation for COVID-19, or with a respiratory illness? *

Immunization Profile



Immunization Profile | ABRAMS, JUANITA

[Add Immunization](#)
[Decline/Contraindicate Immunization](#)
[Export to Excel](#)

ACTIVE IMMUNIZATIONS						
Immunization	Administered?	Date Administered / Documented	Administered By	Lot #	Reason	Action
Flu	Yes	07/28/2020	Clinic			Delete Deactivate

INACTIVE IMMUNIZATIONS						
Immunization	Administered?	Date Administered / Documented	Administered By	Lot #	Reason	Action
Shingles	Yes	07/28/2020	Physician Office			Delete Reactivate

[Back](#)
[Refresh Immunizations](#)
[Exit](#)

There is a list of inactive immunizations in the bottom part of the window. To restore, select the **Reactivate** hyperlink. To add an Immunization, select the **Add Immunization** button in the top left. Choose the Type, Administration Date and Administered By. Once completed, select the **Save & Close** button. Select **Save & Add Another** if more than one is being entered.



Immunization Log Information * required fields

Type

Administration Date

Administered By

[Save & Close](#)
[Save & Add Another](#)
[Cancel](#)

Allergy Profile



This pulls a list of all added allergies for the client. To add an allergy, select **Add Allergy**.



Type in the name of the allergy and the type of allergy. Select **Save & Exit** and the allergy will be added to the report. If there are additional allergies, select the **Save & Add Another** button.



Authorizations Listing

This report shows all current authorizations listed for the client. Authorizations are typically added by the biller/scheduler.

Communication Notes

This report will give a list of all the communication notes created for this client. The report will also show who created the note, the date and provide a PDF to view, print and/or download.



Employee Name	Subject Line	Date	Status	Action
CJ Pierson RN	Lab Results	10/27/2021	Submitted Pending Co-Signature	 Edit Delete
Eric Stone RN	sdfsd	10/12/2021	Completed	 Edit Delete

Select the printer icon and a PDF document will generate with the ability to **Print** and/or **Download**:

Axxess Testing Agency 18500 Dallas Parkway suite 700 DALLAS, TX, 75248-9999 Phone: (214) 575-7711 Fax: (709) 797-7979		COMMUNICATION NOTE	
Client Name: Adams, Andy 4555 Belt Line Rd ADDICKSON, TX, 75001-7500 (214) 575-7711		Physician: ABBOTT, NICOLE 9702 Stonestreet Rd #110 Louisville, KY, 40272-0800 Phone: (502) 588-8600 Fax: (502) 588-8771 NPI: 1043567993	
MRN: 5454185143626 DOB: 01/02/1974			
Date: 07/27/2020			
Client is due to have labs drawn at Southwestern Medical Center 7/29/20			
Download Print Close			

Orders and Care Plans

This report will list all the orders and care plans for this client. The list is a quick way to view these orders when trying to locate a specific one. The list provides the basic details of the orders with the ability to view, print and/or export the document:

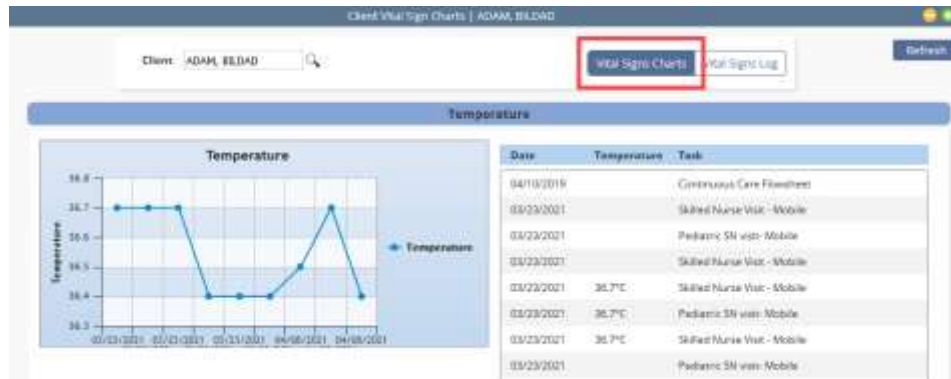
Order Number	Subject Line	Type	Status	Physician	Electronic	Order Date	Sent Date	Received Date	Actions
N/A	Life Skills Teaching		Not Yet Started		No	10/07/2021			
N/A	Life Skills Teaching		Not Yet Started		No	10/05/2021			
641413	Plan of Care-Testing		Not Yet Started	Ansari, Najmus	No	10/03/2021			
622832	Physician Order		Saved	Ansari, Najmus	No	09/03/2021			
N/A	AH HHA CAREPLAN		Reopened		No	08/18/2021			
N/A	MSW Evaluation ce		To Be Sent To Physician	Ansari, Najmus	No	08/10/2021			
586926	Non-OASIS Recertification		Saved	Ansari, Najmus	No	07/30/2021			

Verify that this is the correct date range. Select the printer icon and a PDF document will appear with the ability to **Print** and/or **Download**:

Axxess Testing Agency 16000 Dallas Parkway Suite 700 DALLAS, TX, 75249-9999 Phone: (214) 675-7711 Fax: (214) 767-7878		Custom Care Plan															
Client Name: Adams, Jennie Care Period: 07/02/2020 - Open Associated Mileage: DOB: 12/14/2001	MR: 11222 Time In: Surcharge:	Visit Date: 07/20/2020 Time Out: Physician:															
Allergies																	
Vital Sign Parameters																	
<input type="checkbox"/> DNA <table border="1"> <tr> <td>Greater Than</td> <td>SBP</td> <td>DBP</td> <td>HR</td> <td>Resp</td> <td>Temp</td> <td>Weight</td> </tr> <tr> <td>Less Than</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>				Greater Than	SBP	DBP	HR	Resp	Temp	Weight	Less Than						
Greater Than	SBP	DBP	HR	Resp	Temp	Weight											
Less Than																	
Safety Precautions																	
<input type="checkbox"/> DNA <input type="checkbox"/> Anticoagulant Precautions <input type="checkbox"/> Keep Pathway Clear <input type="checkbox"/> Proper Position During Meals <input type="checkbox"/> Emergency Plan Developed <input type="checkbox"/> Keep Side Rails Up <input type="checkbox"/> Safety in ADLs <input type="checkbox"/> Fall Precautions <input type="checkbox"/> Neutropenic Precautions <input type="checkbox"/> Seizure Precautions																	
Download Print Close																	

Vital Sign Charts

This report pulls a chart of all the prior vital signs documented on visits and a graphic view of their trends. There is also a Vital Signs Log that shows a summary list of all the three taken:




Client: ADAM, BILDAD Date Range: 04/16/2021 - 10/27/2021

Vital Signs Chart | Vital Signs Log

Report

Date	Employee Name	Task	Min BP	Max BP	Temp	Resp	Pulse	RR	Weight	Pain	SpO2
04/17/2021 12:00 PM	Rupak Kulkarni RN	ACTIVE LIVING Home				24					
04/08/2021 12:00 PM	Rupak Kulkarni RN	Pediatric SN visit - Mobile									
04/08/2021 12:00 PM	Rupak Kulkarni RN	Pediatric SN visit - Mobile									
04/08/2021 09:00 PM	Rupak Kulkarni RN	Pediatric SN visit - Mobile	102/72	102/72	36.5°C	8	72				
04/06/2021 07:00 PM	Rupak Kulkarni RN	Pediatric SN visit - Mobile	116/79	116/79	36.7		77				
04/06/2021 11:00 PM	Rupak Kulkarni RN	Pediatric SN visit - Mobile	116/85	116/85	36.4°C	8	73				

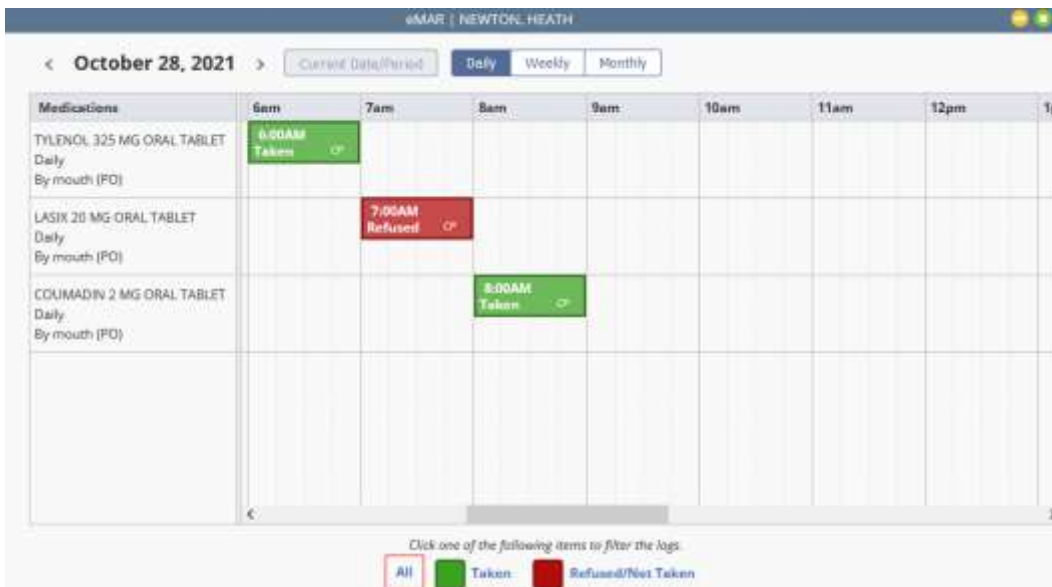
Seizure Records

This report shows all documented seizures by the client. New records can only be added inside of a visit. Select the icons to print, view or delete the listed seizure records.



eMAR Chart

This report shows records of medications that were taken or refused/not taken. The report can be viewed **Daily**, **Weekly** or **Monthly**. Medications taken are displayed in green, and medications refused/not taken are in red.



Edit the medication log by hovering over the scheduled medication time and selecting the edit icon. Select the trash icon to delete. To document a medication being taken that was not scheduled, select an empty square on the calendar. A new window will open. Enter the log time, whether it was taken, the clinician, clinician initial and any comments. Select **Save & Close** when complete.

New eMAR Log

Medication and Dose: LASIX 20 MG ORAL TABLET

Log Time: 10/20/2021 09:00 AM

Medication Taken: Yes No

Reason for Medication Not Taken: Refused Not Taken

Clinician: Q Pierson RN


Clinician Initial:

Comments:

No New 200 characters remaining

Save & Close Cancel

Vent Flow Sheet

This report will show a list of all tasks that included ventilator documentation. Select , **Edit** or **Delete** to updated listed Ventilator Flow Sheets.

Ventilator Flow Sheets | Axxess Testing Agency | NEWTON, HEATHER

Task Date Range: 07/01/2020 - 10/29/2021 Refresh

Filter by Text: Start Typing

Task	Task Date	Vent Type	Employee	Action
Vent Flowsheet	07/28/2020	Astral	PIERSON, Q	 Edit Delete

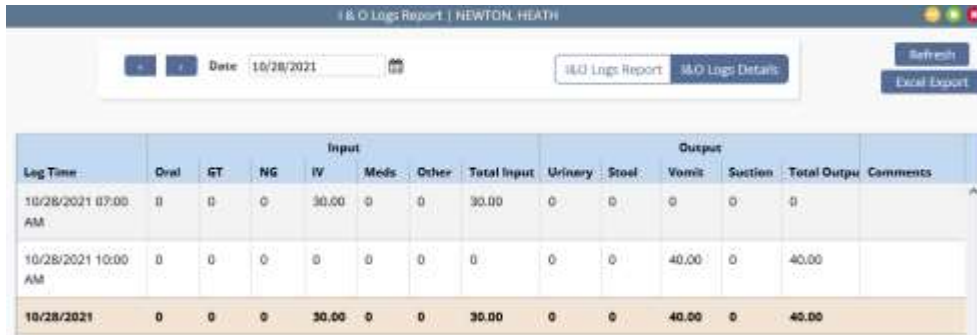
I and O Logs

This report documents the input and output for clients. The report can be viewed by the summary or detailed view. Select **Refresh** to make the list up to date or select **Excel Export** to get an excel copy of the report.

I & O Logs Report | NEWTON, HEATH

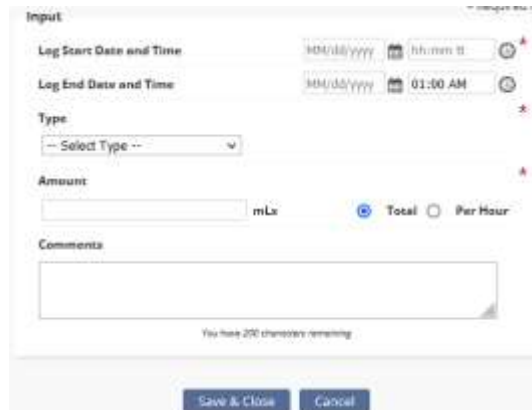
Date Range: 08/28/2021 - 10/28/2021 I&O Logs Report I&O Logs Details Refresh Excel Export Log Input Record Log Output Record

Date	Total Input Amount	Total Output Amount	Variance	Action
10/26/2021	0	100.00	-100.00	View Details Edit/Delete Details
10/27/2021	150.00	100.00	50.00	View Details Edit/Delete Details
10/28/2021	30.00	40.00	-10.00	View Details Edit/Delete Details



Log Time	Input							Output				Comments	
	Oral	GT	NG	IV	Medis	Other	Total Input	Urinary	Stool	Vomit	Suction		Total Output
10/28/2021 07:00 AM	0	0	0	30.00	0	0	30.00	0	0	0	0	0	
10/28/2021 10:00 AM	0	0	0	0	0	0	0	0	0	40.00	0	40.00	
10/28/2021	0	0	0	30.00	0	0	30.00	0	0	40.00	0	40.00	

Select the **View Details** hyperlink to view details. Select the **Edit/Delete** hyperlink to make updates or remove them. Select **Log Input Record** to document any client input. A new window will open. Enter the Log Start Date and Time and Log End Date and Time. Choose the type from the Type drop-down. Enter the amount and add any comments. Select **Save & Close** when complete. The output documentation is the same.



Input

Log Start Date and Time: MM/dd/yyyy | hh:mm tt

Log End Date and Time: MM/dd/yyyy | 01:00 AM

Type: -- Select Type --


Amount: mLs Total Per Hour

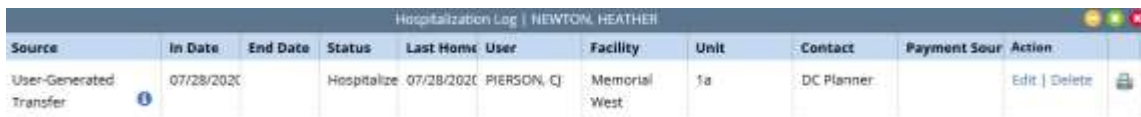
Comments:

You have 200 characters remaining

Save & Close Cancel

Hospitalization Log

This report will show a list of any time the client was hospitalized. Select , **Edit** or **Delete** to listed hospitalization records.



Source	In Date	End Date	Status	Last Home	User	Facility	Unit	Contact	Payment Sour	Action
User-Generated Transfer	07/28/2020		Hospitalize	07/28/2020	PIERSON, CJ	Memorial West	1a	DC Planner		Edit Delete

Hospitalizations cannot be entered from here. They must be entered from *Client Center/Change Status*, and they will move from the active census to a status of Hospitalized.



NEWTON, HEATH ➔

Male, Age 88 - MRN: SAN1234

Physician: Octavius, Otto

DOB: 09/14/1930 Phone:

SOC: 10/16/2018 Phone Type: Medical

[Change Photo]
[Edit] [More] [Directions] [Admissions]

Refresh
Schedule Activity
Change Status

Triage Classification

This report will pull up a PDF version of the client’s emergency preparedness plan/triage classification based on what was answered during the assessment. Select the **Download** and/or **Print** button at the bottom to get a copy of the form.

Access Testing Agency 16000 N Dallas Pkwy #700N Dallas, TX 75248-1234 Phone: (111) 111-1111 Fax: (222) 222-2222	TRIAGE CLASSIFICATION
Client: Boyle, Bruce MRN: 006 DOB: 01/01/1930 16000 Dallas Pkwy Emergency Contact: BOYLE, CHRIS Dallas, TX 75248 (214) 555-1212 Phone: (214) 555-1212 Phone Type: N/A	
<div style="margin-bottom: 10px;"> <input type="checkbox"/> 1. Life threatening (or potential) and requires ongoing medical treatment. When necessary, appropriate arrangements for evacuation to an acute care facility will be made. Unable to evacuate/ transport self. Unable to withstand any interruption in power supply. No readily available family or caregiver or family/ caregiver unable to provide needed care. Requires transport to an acute care facility or specialized shelter situation. Client is equipment-dependent e.g. equipment for life support e.g. patients dependent on Ventilator, LVAD. Client lives in the vicinity of the disaster and lives alone and has no family members. Client has no available transport. Notify EMS and Ambulance Company for transportation from the immediate area. Clients in this category who require ventilator may also need to be assessed for notification of the electric company upon admittance to services. To ensure continuity of electric power should the power fail. </div> <div> <input type="checkbox"/> 2. Not life threatening but would suffer severe adverse effects from interruption of services (i.e., daily insulin, IV medications, sterile wound care of a wound with a large amount of drainage.) Able to withstand up to 48 hour power interruption. Unable to transport self or no transportation available from caregiver. Examples are Oxygen-dependent clients with COPD, insulin dependent and unable to selfinject, large open draining wound with potential for sepsis, IV antibiotics. Clients with renal problems, heart failure or other very high risk clients who should be triaged quickly. Client services may be postponed for up to 48 hours without adverse effect to patient. If necessary, call the police or appropriate local authorities and give name and address of client. </div>	
Download Print Close	

Client Service Goals

Client Service Goals

Newton, Heather (SAN1235) Female

📍 16000 Dallas Pkwy, Dallas, TX • 📞 (214) 555-8889 • 📅 09/14/1930

New Goal

Active
Discontinued

Effective Date	Goal/Objective	Discontinuation Date	Actions
07/25/2020	Client will be able to take medications without caregiver prompting	Not Applicable	Discontinue
06/30/2020	Client will be able to complete basic ADL's on their own	Not Applicable	Discontinue

2 total results
Show 10 entries

By default, active client service goals appear on the Client Service Goals screen. To view discontinued goals, select the **Discontinued** tab in the top left. To add a service goal for the client, select the **New Goal** button in the top right corner of the screen.

Effective Date	Goal/Objective	Discontinuation Date	Actions
MM/DD/YYYY		MM/DD/YYYY	Save Cancel

Enter the effective date and goal or objective for the client. Select the **Save** button to add the goal to the client's goal list. Select the **Discontinue** hyperlink to end a goal.

Effective Date	Goal/Objective	Discontinuation Date	Actions				
07/25/2020	Client will be able to take medications without caregiver prompting	Not Applicable	Discontinue In Progress				
<table border="1"> <tr> <td>Discontinue Date*</td> <td>Reason*</td> </tr> <tr> <td>MM/DD/YYYY</td> <td>Select a reason</td> </tr> </table>				Discontinue Date*	Reason*	MM/DD/YYYY	Select a reason
Discontinue Date*	Reason*						
MM/DD/YYYY	Select a reason						
Discontinue Discontinue & Copy Cancel							

Enter the discontinue date and choose a reason for the discontinuation from the drop-down menu. Selecting the **Discontinue** button moves the goal to the discontinued list. **Discontinue & Copy** discontinues the goal but copies the goal text into a new goal for editing. **Cancel** stops the discontinue action.

Supply Log

The Supply Log quick report displays each supply worksheet addendum completed for the client. At the top of the report screen, search by name or enter a date range to display supply worksheet addenda completed within a specific time frame. The date range is limited to three months. Below the date range filter, users can view all supply worksheet addenda completed in the selected time frame. Depending on permissions, users can edit and/or delete addenda using the hyperlinks in the Actions column.

Supply Worksheet

07/29/2021 — 10/29/2021 Search by Text... Search Excel Export

Description	Quantity Used	Date Used	Employee	Actions
Negative pressure ventilator; portable or stationary	1	10/28/2021	CJ Pierson RN	Edit Delete
Battery charger; replacement for patient-owned ventilator	1	10/28/2021	CJ Pierson RN	Edit Delete
Incontinence Garment, any type, (e.g. brief, diaper), each	50	10/27/2021	CJ Pierson RN	Edit Delete
Walker, enclosed, four-sided framed, rigid or folding, wheeled with posterior seat	1	10/26/2021	CJ Pierson RN	Edit Delete

4 total results Show 50 entries

Suction Log

The Suction Log quick report displays each suction log addendum completed for the client. At the top of the report screen, enter a date range to display suction log addenda completed within a specific time frame. The date range is limited to three months. Below the date range filter, users can view all suction log addenda completed in the selected time frame. Depending on permissions, users can **Edit** or **Delete** addenda using the hyperlinks in the Actions column.

Suction Log

Date Range
07/29/2021 — 10/29/2021 Search Excel Export

<input type="checkbox"/>	Suction Date	Time	Route	Depth	Consistency	Color	Passes	Machine Checklist	Actions
<input type="checkbox"/>	08/26/2021	12:00 PM	Oral	12	Thick	White		Cleaned	Edit Delete

1 total results Show 50 entries

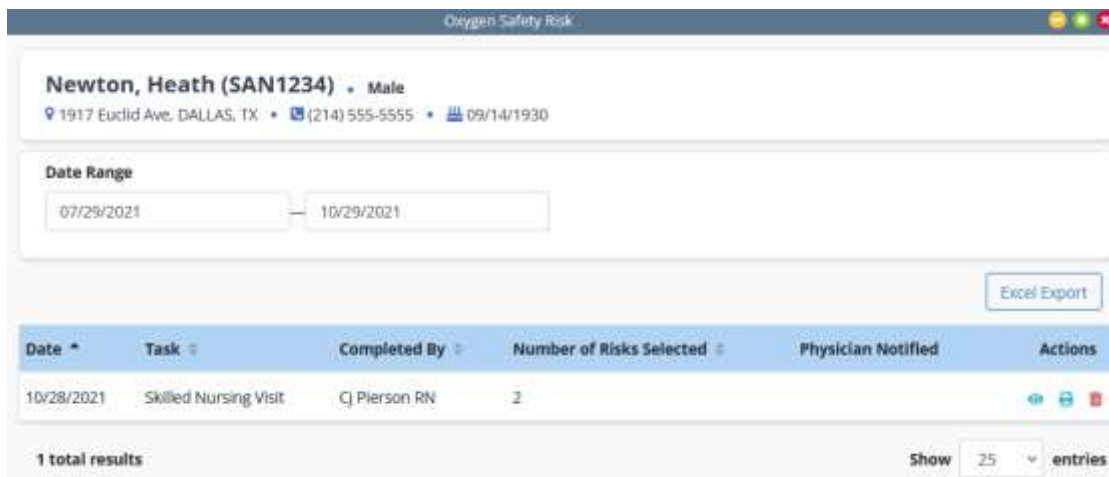
Bulk Print

Oxygen Safety Risk

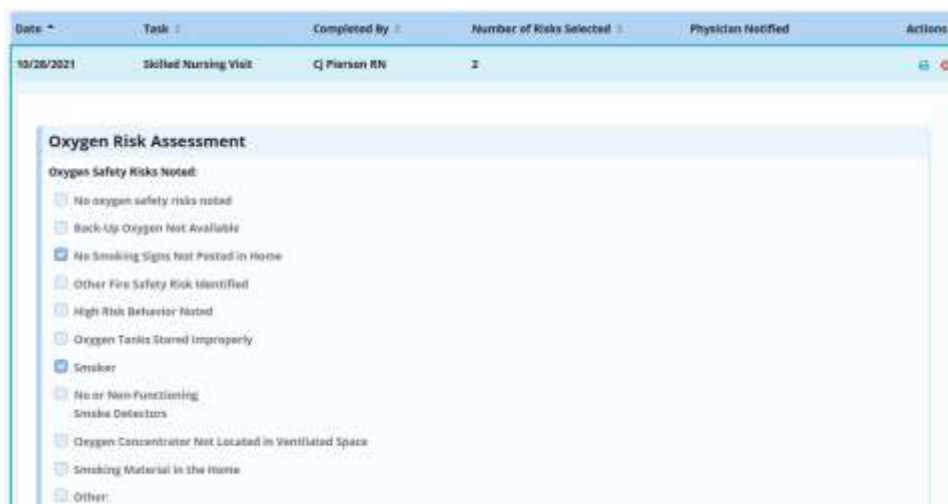
This quick report consolidates and displays oxygen risk addenda completed for clients who require oxygen. To enable the Oxygen Safety Risk quick report, users must identify a client’s need for oxygen in the client’s profile. To identify a client’s need for oxygen, edit the client’s profile and navigate to the **Medical Information** tab. In the Oxygen section, check the box next to “Click here if the client requires oxygen.” Select **Save** to finish identifying the client’s need for oxygen.



Once the client’s need for oxygen has been designated in the client’s profile, users can navigate to the Oxygen Safety Risk quick report to view each oxygen risk addendum completed for the client.



At the top of the report screen, enter a date range to display oxygen risk addenda completed within a specific time frame. The date range is limited to three months. Below the date range filter, users can view all oxygen risk addenda completed in the selected time frame. Depending on permissions, users can view, print and/or delete addenda using the icons in the Actions column.

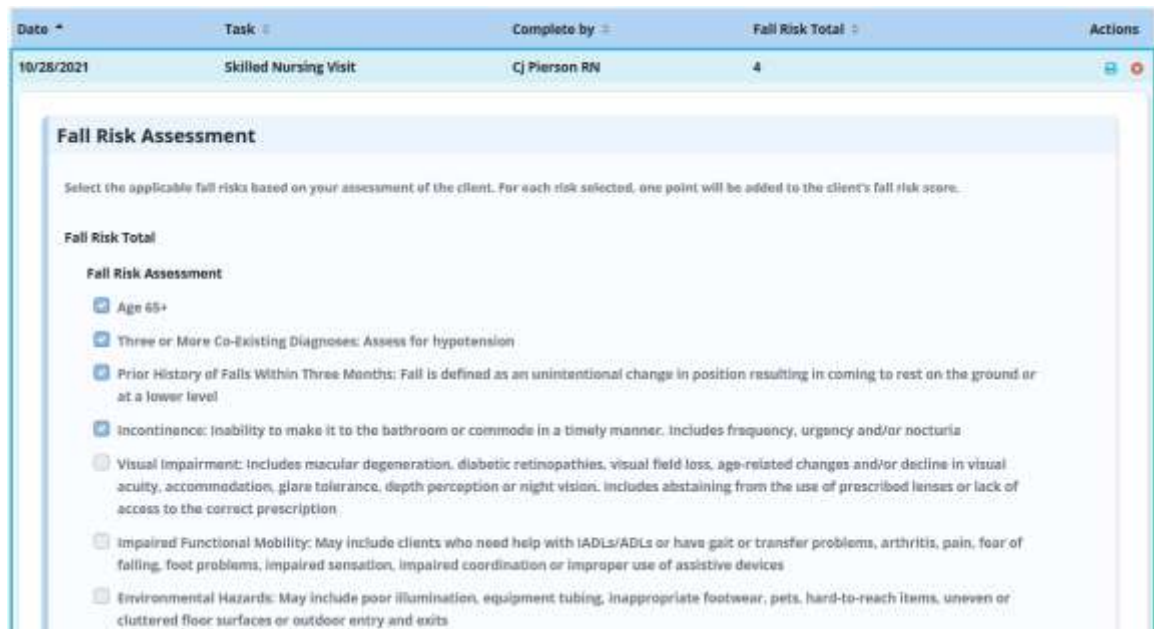


Fall Risk

The Fall Risk quick report displays each fall risk addendum completed for the client. At the top of the report screen, enter a date range to display fall risk addenda completed within a specific time frame. The date range is limited to three months. Below the date range filter, users can view all fall risk addenda completed in the selected time frame. Depending on permissions, users can view, print and/or delete addenda using the icons in the Actions column.



To view the answers selected in an assessment, select the view icon.



Visit Tracking

All tasks reassigned for an employee reason type will appear in the employee's Visit Tracking report.



Tracking Type	Task	Task Date	Reason	Client	Performed By	Performed On	Action
Reassign	OT Pediatric Evolve	11/04/2020	Distance	COLLINS, LCP	Rupal Anshakar LYN	11/04/2020	edit
Reassign	OT Pediatric Evolve	11/04/2020	IMC	COLLINS, LCP	Chesapeake Endless PH	11/04/2020	edit
Reassign	IVS Note- M & W - RA	11/14/2020	Non-reason	JOHNSON, RYAN	Rupal Anshakar LYN	11/04/2020	edit
Reassign	PT Pediatric Evolve	11/04/2020	Ray Pate	COLLINS, LCP	Chesapeake Endless PH	11/04/2020	edit
Reassign	PT Pediatric Evolve	11/19/2020	Termination	COLLINS, LCP	Chesapeake Endless PH	11/04/2020	edit
Reassign	PT Pediatric Evolve	11/15/2020	Family Emergency	ROHL, BILL	Chesapeake Endless PH	11/04/2020	edit
Reassign	PT Pediatric Evolve	11/16/2020	Client Compatibility	ROHL, BILL	Chesapeake Endless PH	11/04/2020	edit
Reassign	PT Pediatric Evolve	11/08/2020	Wrong reason	COLLINS, LCP	Chesapeake Endless PH	11/04/2020	edit

To edit the reason for a reassignment, select **Edit** from the **Actions** column.

Wound Flowsheets

The Wound Flowsheets enables users to track, and trend wound progress to facilitate quality improvement and optimize client outcomes. At the top of the report, users can filter by date range. Flowsheets completed during the selected date range will populate in the report.



Assessment Date	Location	Onset Date	Wound Type	Pressure Ulcer Stage	Measurements (in cm)	Drainage	Drainage Amount	Odor	Attachment	Actions
06/08/2022	left elbow	06/01/2022	abrasion	III	2 L x 4 W x 0 D	Serous	Minimal	No		edit
06/08/2022	Right knee	06/01/2022	Surgical Wound	III	9 L x 4 W x 0 D	Serosanguinous	Moderate	Yes		edit

To view an attachment, select the paperclip icon under Attachment. To view additional information, select the view icon under Actions. To export the list to an Excel spreadsheet, click **Export**.

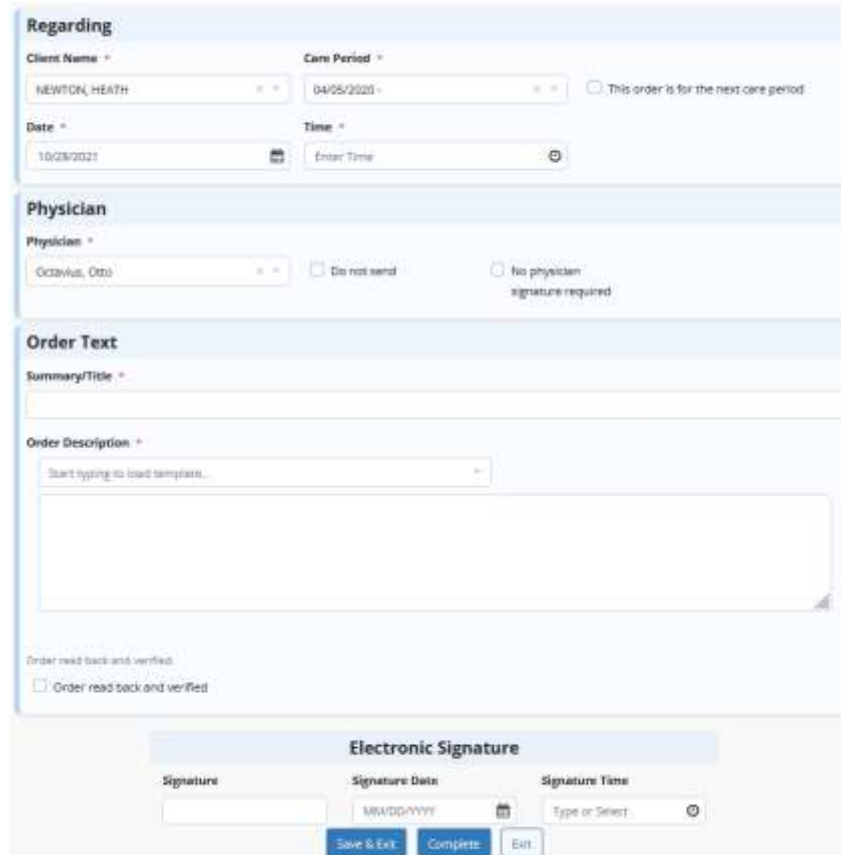
Deleted Tasks/Documents

See *Deleting a Task* below

CLIENT CHART TABS

Create - Order

Client Center/Create/Order

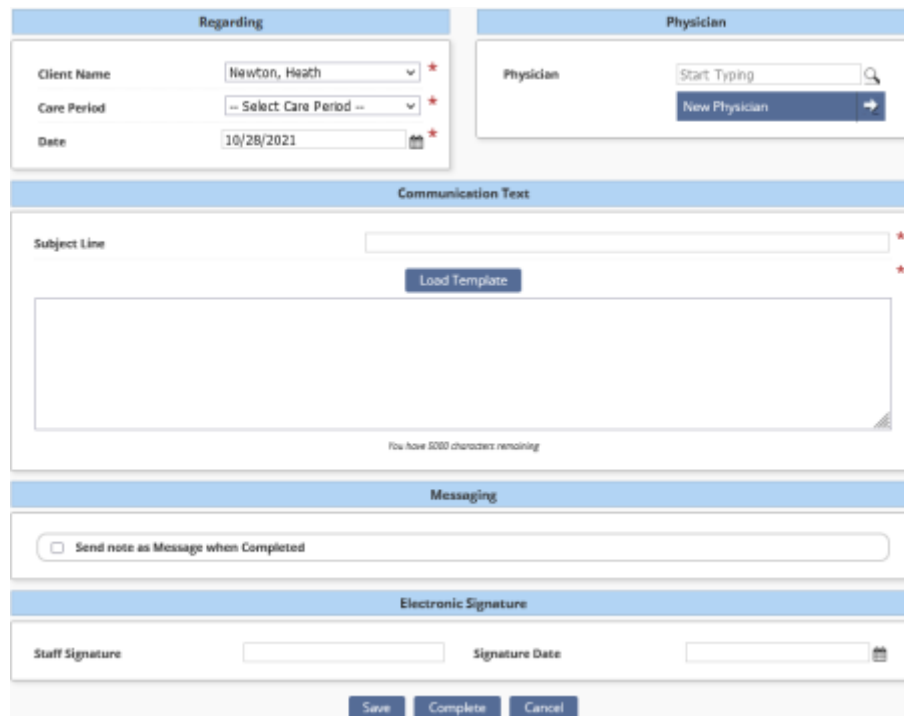


- Client Name - will auto-fill in the designated field.
- Care Period - will auto-fill in the designated field.
- Order is for next Care Period - check this box if the order will go to the next Care Period.
- Date - the date will default to today's date but can be changed if necessary.
- Time – enter time of order.
- Physician - will auto-fill in the designated field. Locate a different physician that will be signing order by starting to type name. Indicate whether order should not be sent or whether no signature required.
- Summary/Title - give this orders a title.
- Order Description - enter text given for order. Option available to **Load Template**.

- Read Back - indicate if the Order has been read back by selecting the check box.
- Enter Signature, Date and Time. Select **Save & Exit** to return later or select **Complete** when finished.

Create - Communication Note

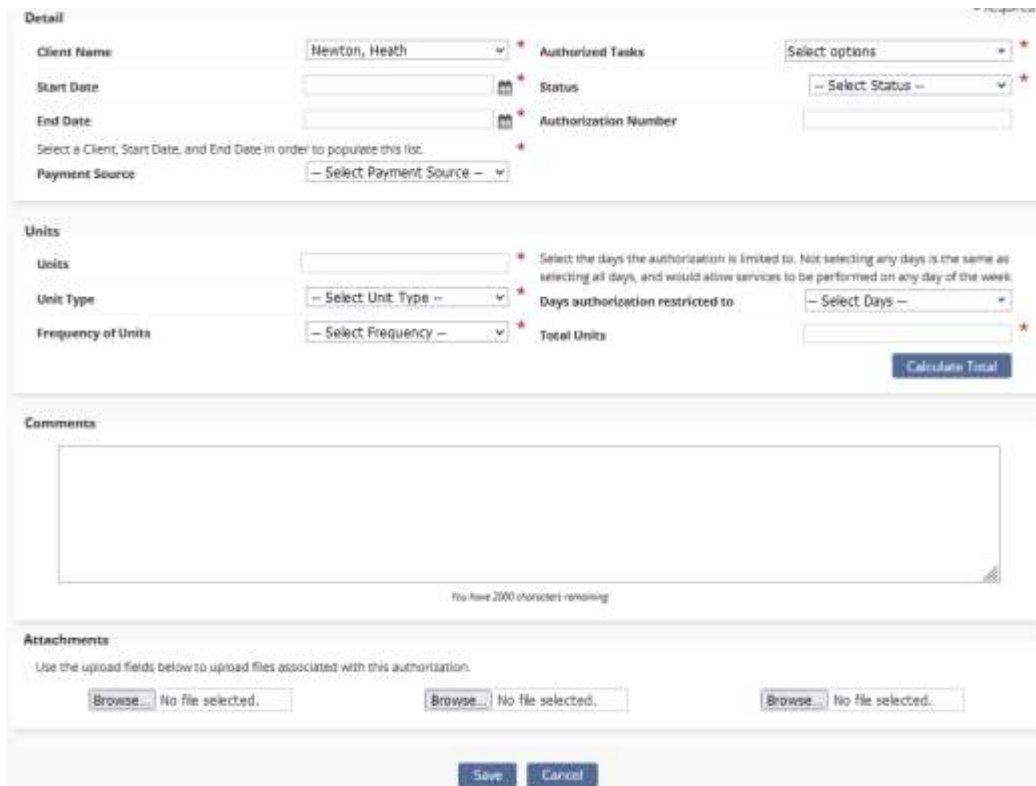
Client Center/Create/Communication Note



- Client's Name - automatically filled.
- Care Period - select the drop-down to select the care period assigned.
- Date - defaults to today's date but can be changed.
- Physician - start typing in the physician's name, and a drop-down box appears. If the physician is not currently in Axxess, select **New Physician** to enter the name.
- Subject Line - this is the area where the title and communication note is written - either free text or select one of the organization's templates.
- Send note as Message - check this box to send the note as a message to other users in the organization.
- Electronic Signature – enter staff's signature and signature date.
- Select **Save** to complete later or select **Complete** when finished.

Create - Authorization

Client Center/Create/Authorization



- Client's Name - automatically filled.
- Start and End Date - enter the date range of the authorization.
- Authorized Tasks – indicates which tasks will be covered by the authorization by checking specific boxes or select **Check all** to select all boxes/tasks.
- Payment Source - select payment source from the drop-down menu.
- Status - Indicate whether the authorization is active, pending, closed or denied.
- Units - enter how many units were authorized for this client.
- Unit Type - choose between per hour, per visit or per 15 min block.
- Frequency of Units - how often are the units used.
- Total Units - enter or select **Calculate Total** for the number to be generated.
- Enter any comments or attach any documents related to authorization. Select **Save** when complete.

View

Select the **View** tab to see any of the Quick Reports listed in the top right of the Client Center.

Profiles

Users can view the Client, Medication, Infectious Disease, Immunization and Allergy Profiles that are also available in the Quick Links shown above.

Schedule

Client Center/Schedule/Schedule Activity

Select **Schedule Activity** to be taken to the Schedule Center already filtered for the client. *See Schedule Center below.*

Documents

Client Center/Documents/New Document

To add any documents/attachments to the client’s chart, select **New Document**. A new window will open for a new document. Select **Browse...** to find a file saved on the computer and choose the Document Name. Then select **Upload**.



Client Center/Documents/View Documents

Documents that have been uploaded will display. Select the **Edit** or **Delete** hyperlink to make updates. Select the **File Name** to open or save a copy of the document. To upload a document, select the **Add Document** button.




Document Name	File Name	Created	Modified	Action
Labs	NEWTON Lab Results 102621.docx	10/28/2021	10/28/2021	Edit Delete
Admission Records 1	NEWTON Admit Records 102621.docx	10/28/2021	10/28/2021	Edit Delete

SCHEDULE CENTER

Client Center/Schedule Activity or Schedule/Schedule Center



The left column provides the ability to view client and employee calendars/schedules. The default search is by **Client**. Selecting **Employee** updates the criteria and results to employee. The Schedule Center has a list of menus located at the top of the screen that prepare and manage the client's schedule.



The calendar defaults to a month view of the current month. View by calendar or select the **List Tasks** button in the top right or the **List Tasks** tab in the bottom right to see tasks stacked in a grid. Select the **Hide List** tab to get back to the calendar view.

Task	A	Payment Source	Start Time	End Time	Employee	Status	Action
MSW Evaluation		Bob's Invoice	09/27/21 1:00 AM	09/27/21 2:00 AM	Wendy Amerson RN	Missed Visit(Complete)	
Custom Wait - Mobile		Bob's Invoice	09/28/2021	09/28/2021	Shwetha Lathi RN	Not Yet Started	
Infusion Initial		Bob's Invoice	09/29/21 2:00 AM	09/29/21 3:00 AM	Akiyuki Kato RN	Not Yet Started	
Life Skills 2		Bob's Invoice	09/30/2021	09/30/2021	Akiyuki Kato RN	Not Yet Started	
Continuous Care Flowsheet		Bob's Invoice	09/30/21 9:00 AM	09/30/21 1:00 PM	Eric Stone RN	Not Yet Started	
Infusion Initial		Bob's Invoice	10/01/21 6:00 AM	10/01/21 7:00 AM	Reymart Casas RN	Not Yet Started	

Tasks are shown in color that corresponds to the status of the task. The following is the color legend:

Scheduled
 Completed
 Missed
 Unassigned
 Care Period 07/26/20-

Returned
 No Access
 Unauthorized

SCHEDULING A TASK (PERMISSIONS-BASED)

Schedule Center/New/Client Task or select any free space on desired time of task.



Choose a shift length and whether to override shift length or schedule without time by selecting the checkboxes. Enter the from and to date and time. Choose the payment source, task, recurrence and the caregiver/employee completing the task. There is an optional comments box with a 1,000-character limit. Select **Save & Close** for adding a single task and select **Save & Add Another** if there is more than one.

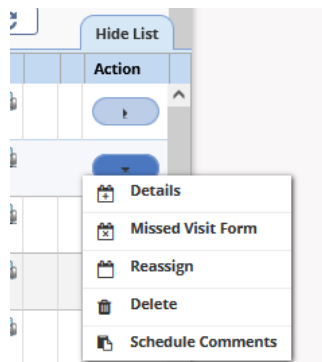


The image shows a screenshot of the 'Employee Scheduler' form. It includes fields for Client (ABABA, JESS L.), Shift Length (1 hours), and checkboxes for 'Override Shift Length' and 'Schedule without Time'. There are date pickers for 'From' and 'To' (both set to 10/28/2021), a 'Payment Source' dropdown, a 'Task' dropdown, and a 'Recurrence' dropdown set to 'None'. A 'Caregiver/Employee' section has a 'Filter by' dropdown set to '1 selected' and another dropdown set to 'Unassigned'. A 'Comments' text area is at the bottom with a character count. At the very bottom are buttons for 'Save & Close', 'Save & Add Another', and 'Cancel'.

After adding a task, hover over the task in the Schedule Center for more options. Depending on the status of the visit, there are options to document, print, edit the missed visit form, edit the scheduled date/time, reassign, restore, delete or view quick details.



Task Details: In the List Tasks view on the right-hand side of the screen (under the Action column) will be a Menu drop-down option Details for all tasks (permissions-based).



The window will open, displaying the details of the task. Make edits to the task, add comments, add attachments, add supplies or view the Activity Log. Select **Save** to keep any updates.

Details

Client: ABABA, JESS L. Care Period: 09/20/2021 - Open

MRN: GD511192030

Task: Skilled Nursing Visit [Load Matching Task Documents](#) Status: Not Yet Started

Scheduled Start Time: 10/04/2021 [Assigned To](#): Eric Stone RN [Reassign Task](#)

Scheduled End Time: 10/04/2021 [Surcharge](#): \$

Actual Visit Date/Time In: 10/04/2021 12:00 AM [Associated Mileage](#)

Actual Visit Date/Time Out: 10/04/2021 12:01 AM [Travel Time](#): mins

[Schedule without Time](#)

Payer: Private (Self) Pay [Load Payers](#) [Billable](#)

Payroll Details

Payable	Start Date	Start Time	End Date	End Time	Units	Rate	Rate Type	Paid	Actions
<input checked="" type="checkbox"/>	10/04/2021	12:00 AM	10/04/2021	12:01 AM	0	\$0.00	None Specified	No	✔

Gross Profit Forecast

Billing Amount: \$0.00 Payroll Amount: \$0.00

Gross Profit Percentage: 0%

Supply

[Supply Worksheet](#)

Comments [Yellow Sticky Note](#)

Return Reason [Orange Sticky Note](#)

[View Comments](#)

Attachments

There are 0 attachment(s). Use the upload fields below to upload files associated with this scheduled task.

[Browse...](#) No file selected.

[Browse...](#) No file selected.

[Browse...](#) No file selected.

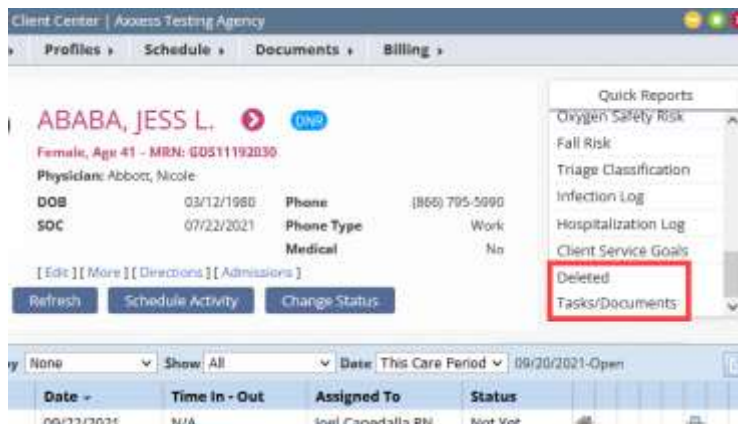
[Save](#) [Close](#)

DELETING A TASK (PERMISSIONS-BASED)

Hover over a task and select the trash icon or (from the Task List view) go to the Menu drop-down and select **Delete** to remove a task. The confirmation below will appear:



Select **Yes** and the task will be deleted, but still stored in the “Deleted Tasks/Documents” in the Clients Chart. Select the **Restore** hyperlink to reactivate.



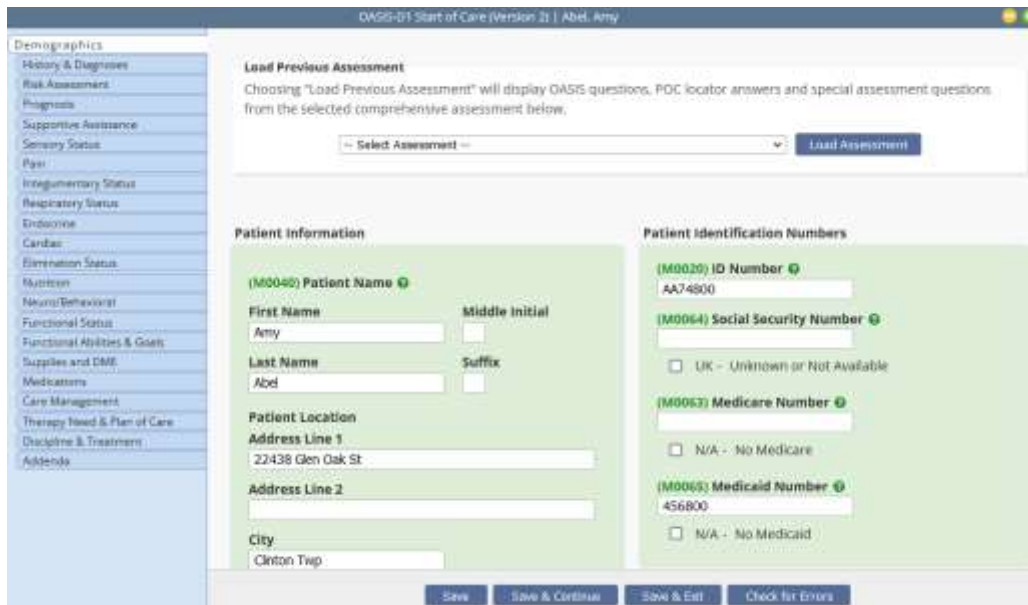
Client Deleted Tasks/Documents History | ABABA, JESS L.

Filter by Text Start Typing Refresh

Task/Document	Scheduled Time	Actual Time	Status	User	Action
Nutritional Assessment Form	11/22/2021 12:30 PM	11/22/2021 12:30 PM	Not Yet Due	Lorna Symonds RN	Restore
Homemaker Visit	10/19/2021 04:00 PM	10/19/2021 04:00 PM	Not Yet Started	Jan Sedayao	Restore
Homemaker Visit	10/19/2021 02:00 PM	10/19/2021 02:00 PM	Not Yet Started	Jan Sedayao	Restore
24 hour visit note	10/16/2021	10/16/2021	Not Yet Started	Rupali Kaware RN	Restore
Initial Pediatric Assessment-Training	10/16/2021	10/16/2021	Not Yet Started	Ladawn Pierce RN	Restore
AH MHA NOTE	10/14/2021 12:00 AM	10/14/2021 12:00 AM	Not Yet Started	Rupali Kaware RN	Restore
24 hour visit note	10/09/2021	10/09/2021	Submitted Pending Co-	Rupali Kaware RN	Restore

OASIS - START OF CARE



When charting information in the Start of Care (SOC) visit, some information has already pulled in from the client’s profile. Make sure all required questions get filled in the rest of the visit. This will be indicated by red asterisks.



- **Green Boxes** - Information in the Green boxes are the M questions that will be exported to CMS. At the end of the OASIS, select **Check for Errors** and the system will make sure all OASIS questions are answered and not conflicting.
- **Grey Boxes** - These questions will pull to the Plan of Care (sent to physician for signature).
- **Cream Boxes** - Physical Assessment questions.

When all information is complete, select the **Check for Errors** button. A window will open showing any warnings or errors.



Warnings will have a yellow triangle  icon. This message is the software letting users know of things they may want to look at before submitting the OASIS and is not a hard stop. A fatal error will be a red stop  icon. This message is the system letting users know this question either needed to be answered or answered differently. Users cannot finish this OASIS with red error messages. Confirm the HIPPS Code, OASIS Claim Matching Key, and HHRG scores all have a code. These codes are going to affect billing, so they should not be blank.

YOU HAVE 0 ERRORS AND 0 WARNINGS

None
No Errors, No Questions - Congratulations!

OASIS Information:

HIPPS Code: 18FKS HHRG Code: C2F151
 OASIS Claim Matching Key: 21KY21KY11CADAADA

Signature:

Time In: 10/12/2021 07:00 AM Time Out: 10/12/2021 08:00 AM
 Clinician Signature: _____ Date: _____ Time: _____

OASIS Scrubber
OASIS File
Return to OASIS
Complete

Before finishing the OASIS, users can run the **OASIS Scrubber** by selecting the red button in the bottom left. Axxess has integration in place with SHP for OASIS Audits. This will look for any inconsistencies or flags that the organization may want to address. These audits are not necessarily wrong, the scrubber is looking for inconsistencies.

Axxess Testing Agency 10000 Dallas Parkway suite 700 DALLAS, TX, 75240-0999 Phone: (214) 575-7711 Fax: (789) 797-7979	OASIS-D1 Start of Care Audit Logical and Clinical Inconsistency Check
Home Health Gold Edit Report	
Client Name: Newton, Heather MR: SAN1235 OASIS-D1 Start of Care assessed on 07/26/2020	
Clinical 79404C Inconsistency Flag (79404C) - The following may be inconsistent: (M1240) Formal Pain Assessment Conducted = 2 - Yes, indicates severe pain (M1720) When Anxious = 0 - None of the time	
Clinical 52114C Inconsistency Flag (52114C) - The following may be inconsistent: (M1240) Formal Pain Assessment Conducted = 2 - Yes, indicates severe pain (M1860) Ambulation = 1 - With the use of a one-handed device	
Clinical 92885C Inconsistency Flag (92885C) - The following may not be in accordance with agency policy. (M1028) Active Diagnoses 2 - Diabetes Mellitus (DM) = (NOT ASSESSED) CMS anticipates that (-) Not Assessed will be a rarely used response.	

After all audits have been addressed, make sure the Time In and Time Out is filled out. Then enter the signature, date, and select **Complete**. Once the OASIS is finished, it will be sent to the QA Center for approval.

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/>

