HOME CARE
MOBILE ANDROID
TRAINING MANUAL
November 2022

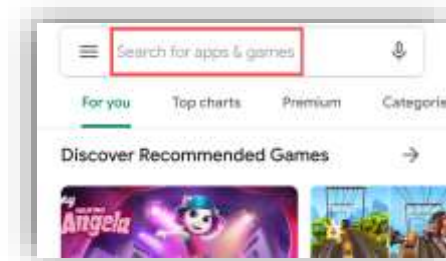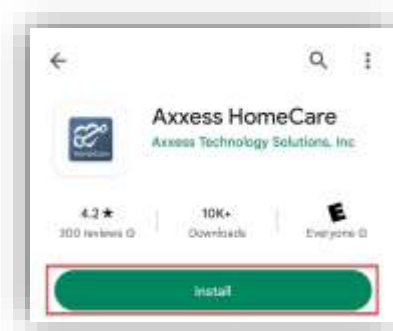## **Table of Contents**

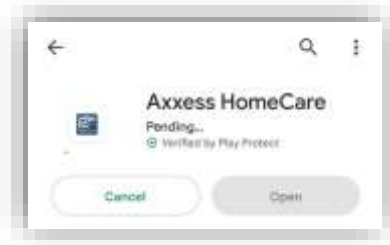## DOWNLOADING APP

Go to the Google Play Store.
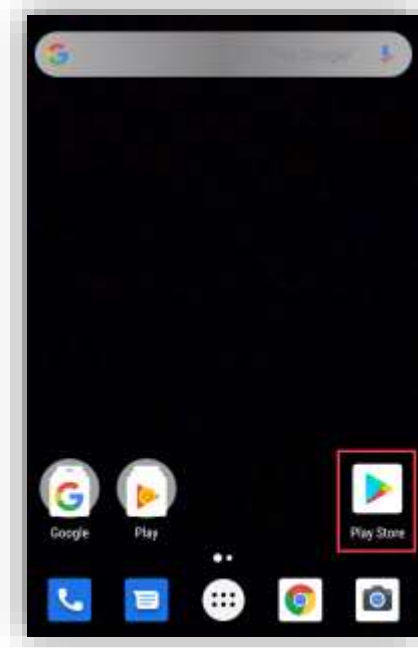
Select the search bar at the top of the page.

Search for Axxess Home Care. The app is blue and says Home Care at the bottom of the Axxess logo (heart and key). Select the search result and select the green **Install** button.
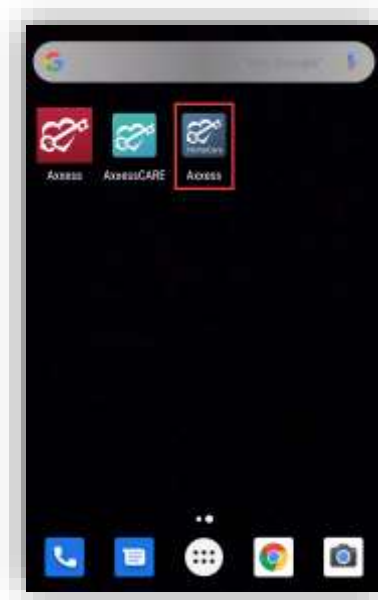
Then the download process will begin.

Once downloaded, select the **Open** button.

The app will be located with the rest of the user's apps. Always download the latest update from the Google Play Store for free.


Select the Axxess Home Care app to open. Allow Axxess to have access to the location. Allowing this feature is critical for the app to pinpoint the location accurately for Electronic Visit Verification (EVV), which will be covered later.
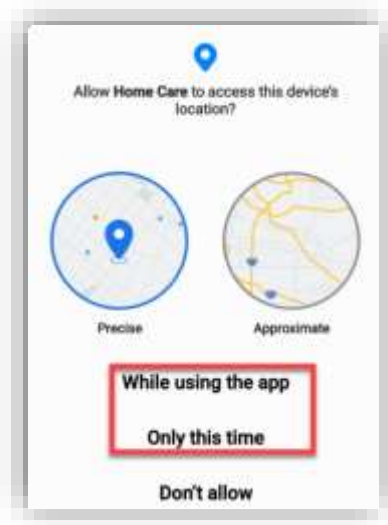
The following is the login screen. Enter the email that was provided to the organization and the established password while logging into the desktop version of Axxess Home Care.

If the password was forgotten, select the **Need Help?** hyperlink. Enter the email address associated with the account and then select the **Reset Password** button, which will send the password reset instructions to the email.

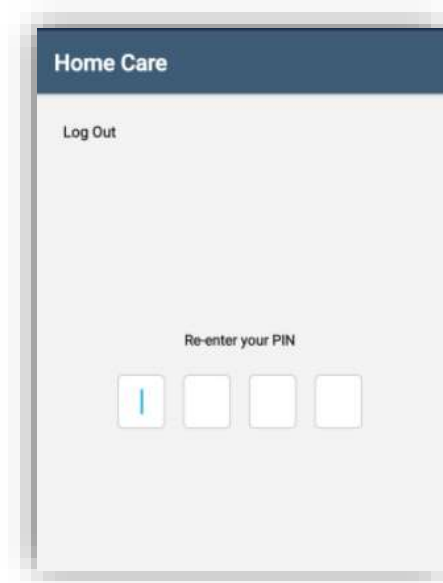Enter the email address and password, then select **Login**.
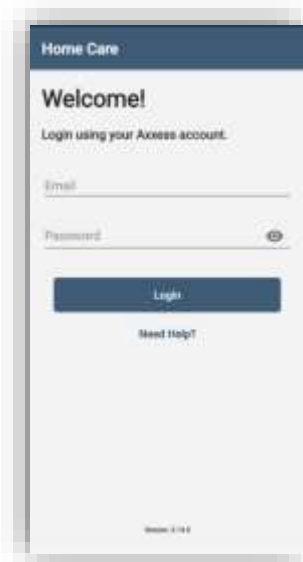
If the user completes notes for multiple organizations, they will be prompted to select the organization name they are currently documenting for. The user will then be required to create a four-digit PIN code.

Once a four-digit PIN code has been entered, confirm the PIN code by entering it one more time. **Any time the user leaves the app or the app times out due to inactivity, the PIN code must be reentered**.

NOTE: After five incorrect attempts, the user will be prompted to log back into the app and create a new PIN.
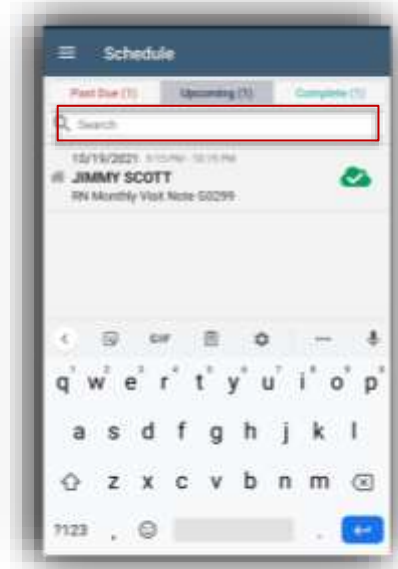
SCHEDULE

The following is the Schedule. The Schedule is split up between three tabs at the top of the page: **Past Due**, **Upcoming** and **Completed**. The tab being viewed is highlighted in gray. The number in parentheses next to the tab title is how many tasks or visits are in each category.


Visits will be listed one by one. It will show the visit date at the top and the planned visit time to the right. Below is the client's name in bold. Below that is the type of visit, and to the left is the EVV status. There are three different EVV statuses:


To narrow down the list, use the search bar below the schedule tabs. Select inside the search and start typing the name of the client.

Another way to narrow down the list of clients is by the **Filters** button at the bottom of the page. Search by client name, date range, EVV status or sort the schedule by client name, EVV status or date range. Once a filter has been chosen, select the **Apply Filters** button on the bottom right.
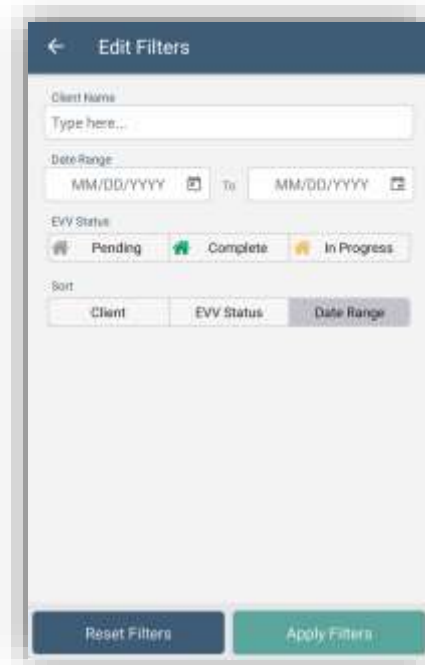
Select the **Electronic ID Badge** button for a quick view that users can show when seeing clients. Select **Upload Image** to take a photo or choose from the photo library for a picture of the user.
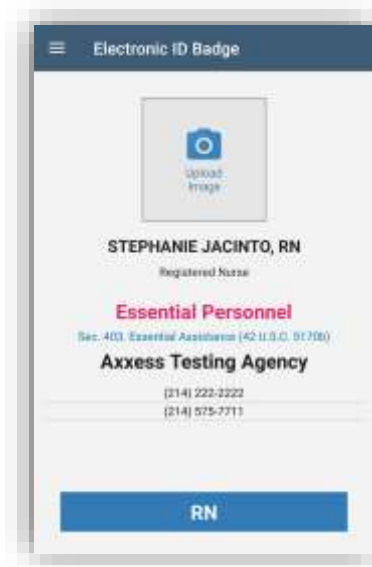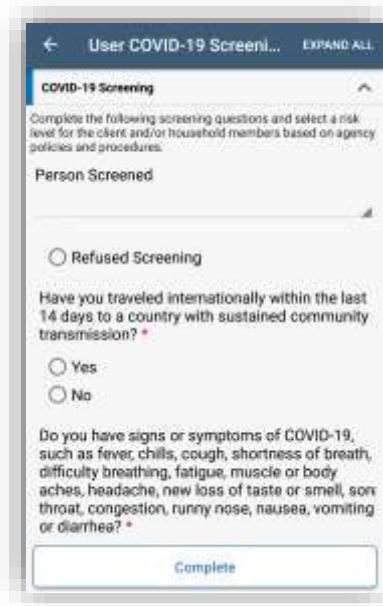
SCREENINGS

All mobile app users can complete a COVID-19 screening from a mobile device. From the **Schedule** screen, select the **Employee COVID-19 Screening** button or select the menu button in the top left and select Employee COVID-19 Screening.
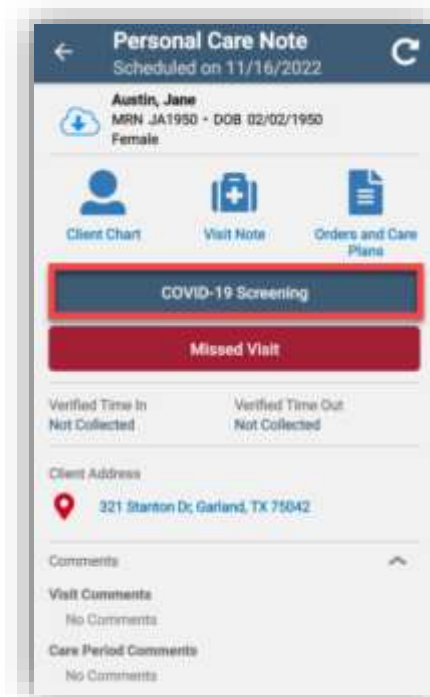
Complete the screening questions and assign a risk level based on the organization's policy. Select **Complete** to save the screening. Once completed, the screening information flows to the employee's Infectious Disease Profile.

To screen clients, select a client visit and select the **COVID-19 Screening** button.

Indicate who is being tested. Complete the screening questions and assign a risk level based on the organization's policy. Select **Complete** to save the screening. Once completed, the screening information flows to the client's Infectious Disease Profile.

ELECTRONIC VISIT VERIFICATION

To start the task verification process, select a visit from the schedule. It will show the client name, MRN, date of birth, task type, date and where the client is located on the Google map marked by the red push pin 📍 icon. Select **Clock In**.
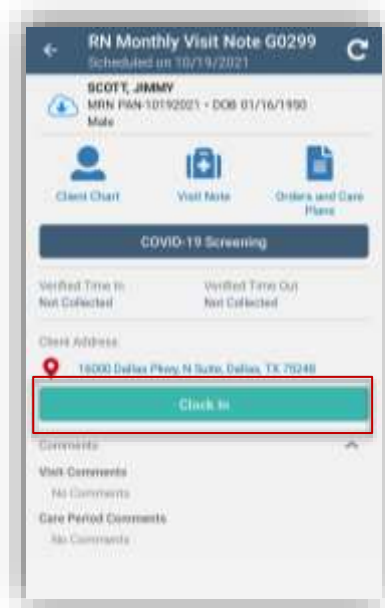
When a user attempts to clock into a visit that is scheduled at least one day but fewer than six days in the past, the app will provide a warning message informing the user that the visit is scheduled in the past.
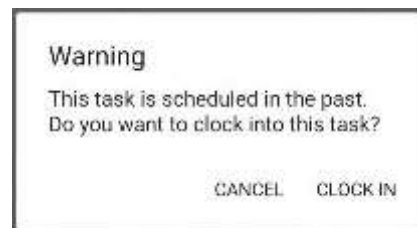
When a user attempts to clock into a scheduled visit over five days in the past, the app will provide an error message informing the user that the visit is over five days old. Users can select **OK** to exit the warning message without clocking into the visit. Users cannot clock in to visits that are older than five days. If a user

needs to complete a task that is older than five days, the task must be rescheduled.

If the user is not located within a reasonable distance to the client's home, the following error will display:
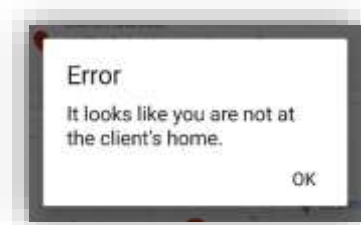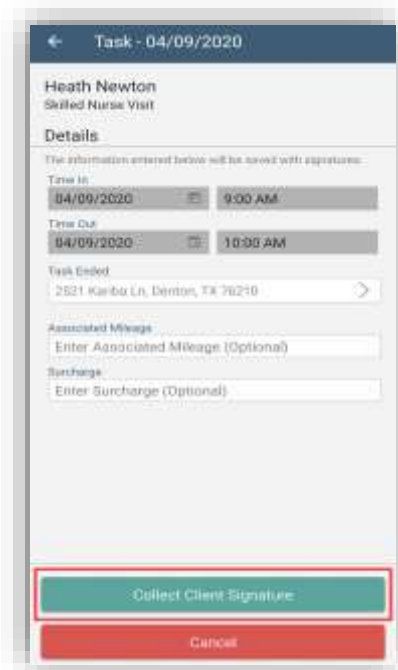

If the user is in range of the client's home, the app will begin retrieving the location. Once retrieved, the client's name is listed at the top of the page followed by the type of visit. Select the time in and out calendars and clocks to update. Enter any optional associated mileage or surcharge.

Once the caregiver clocks in, the visit timer becomes visible from the **Task Details** screen and **Visit Note** screen if applicable. Visit comments and care period comments are also visible along with direct links to the **Client Chart**, **Visit Note** and **Orders and Care Plans**.
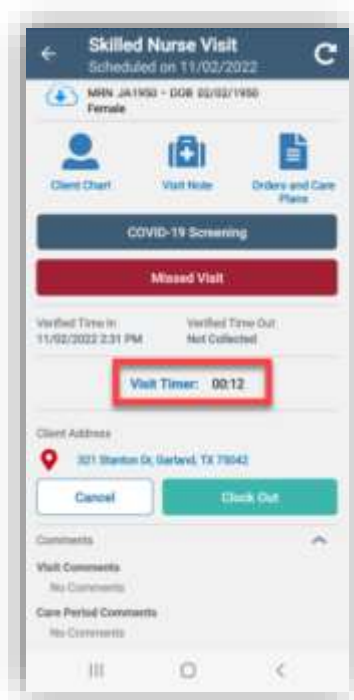
When the visit is finished, select the **Clock Out** button. Then select **Collect Client Signature**.

NOTE: This setting is chosen in Company Setup. Users may or may not have access to change the time in or out depending on setting choice.

NOTE: Only collect a signature if the user is ready to finish the visit.

Client Signature

Select **Collect Client Signature**.

Clients will be asked to confirm that the visit was performed by the user along with the visit date and time. Use a finger or stylus to have the client sign. Select **Clear Signature** for the client to redo their signature or **Submit** in the bottom right.

There will be confirmation that the EVV process is completed. Select **OK** to continue.

Select **View Visit Verification** to view the information collected. This page now includes the verified time in and out, client's signature, the task started location 📍 icon and the task ended location 📍 icon. Select the back arrow ← icon in the top left to get back to the schedule.
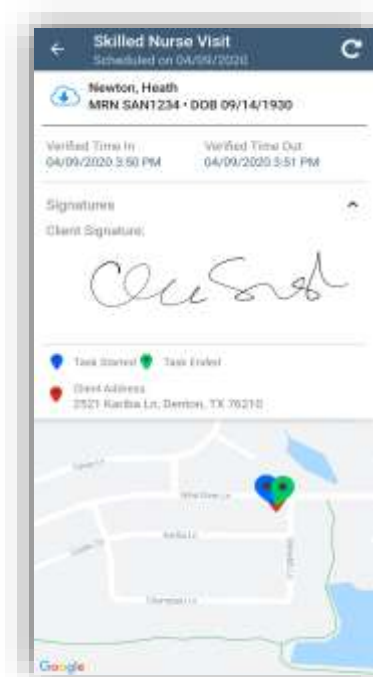
The EVV Status icon next to the client's name will update to green.

Unable To Sign

If the client is not able to sign the verification, select **Client Unable to Sign**.

Choose from the following options and select **OK**:
- Physical Impairment
- Mental Impairment
- Other

If **Other** is selected, the user must enter the reason in the free text space. If the caretaker signs on behalf of the client, they must verify if the visit was performed

by the user and the visit start and end time. Once verified, select **Collect Caretaker Signature**.

Then the staff/user performing the visit will sign, select **Collect Staff Signature**.

The staff will then sign with a finger or stylus and select **Submit** on the bottom right.

After the staff has signed, select **Submit**.

Client Voice Recording

Users can collect a patient voice recording after selecting **Client Unable to Sign**. When a client is unable to provide a signature to verify services, select **Client Unable to Sign** and select the reason that a client's signature cannot be obtained. After specifying a reason, select **Collect Patient Voice Recording** to capture the client's audio voice recording.

Select **Start Recording** and instruct the client to state his or her name and the date of service.
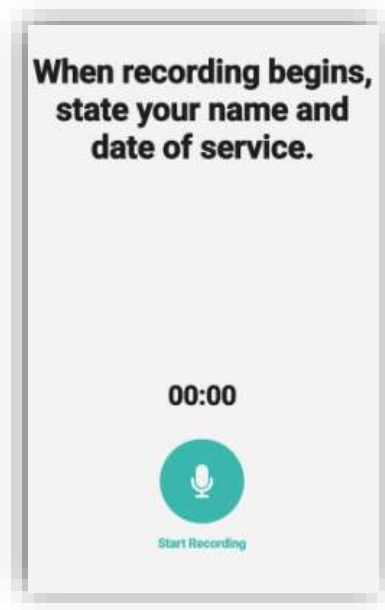
Select **Stop Recording** to end the recording once the client has stated their name and the date of service. The recording will stop automatically if not ended before 30 seconds.
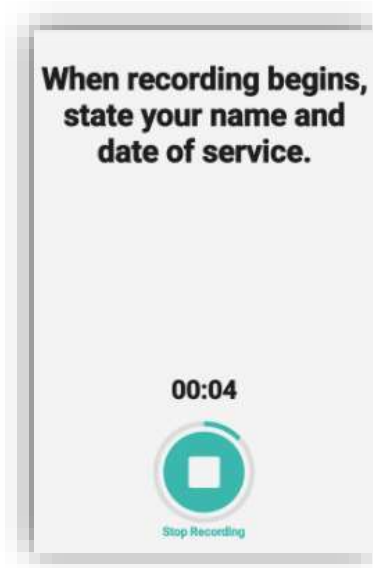
Select **Play** to play the recording, **Replace** to re-record or **Submit** to accept the recording.
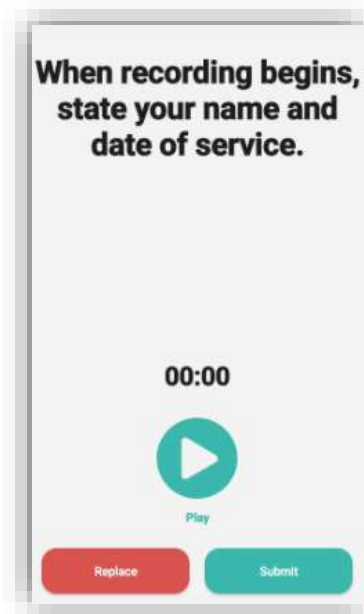
Once submitted, the **Client Voice Recording** button updates to green to indicate that the recording was saved. Once saved, the user can continue completing the visit.

The Client Voice Recording label will appear on the visit, instead of the client signature, to indicate that a voice recording was collected to verify the visit.

Once the visit is complete, the client voice recording is saved and stored on the Electronic Visit Verification (EVV) log screen. Users can play and download client recordings from this screen for auditing purposes. To access the Electronic Visit
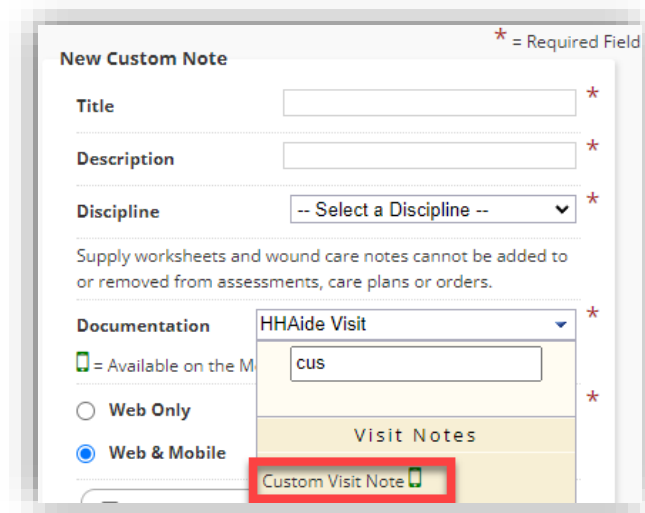
Verification (EVV) screen, navigate to the **Schedule Center** or **Client Center** and select the green house associated with the visit.

MOBILE DOCUMENTATION

Mobile custom visit notes are available on Android devices so caregivers can document visit information at the point of care. These must be set up in the Axxess Home Care web application by going to *Admin/Company Setup/Document Management* and selecting the **New** button then completing the New Custom Note box (permissions required).

In the **Documentation** field, select **Custom Visit Note** from the drop-down menu. The 📱 icon appears next to documents that are available in the Axxess Home Care mobile app. Select **Save** to create the note.
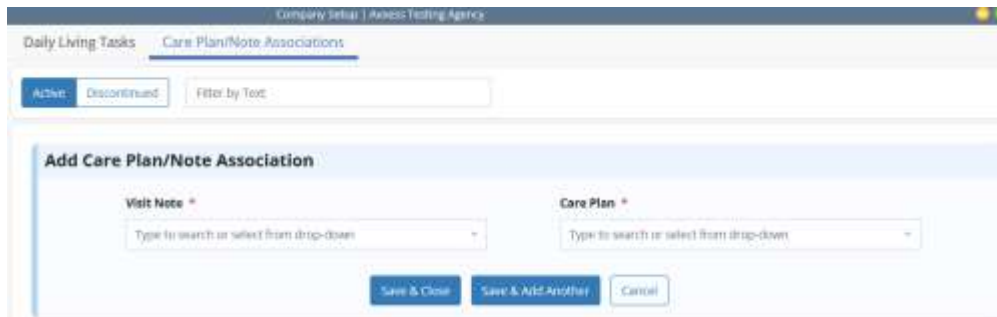
NOTE: Other mobile documentation notes can be added from here including skilled visit notes.

While setting up documentation, addendums can be added to the visits. These will also be available for completion through the Axxess Home Care app. Below is a list of available addendums. Select **Save** to add the visit.

NOTE: In and Out Logs (I/O), Vent Flowsheet and Fall Risk Assessments will need to be completed though the Axxess Home Care web application.

Navigate to the *Admin/Company Setup/Custom Care Documentation* tab/Care Plan/Note Association page to link the new note to a care plan. Select **Add New** in the top right corner. Select the note from the Visit Note drop-down menu and link it to a care plan using the Care Plan drop-down menu. Select **Save and Close**. Once set up, schedule the custom visit note for any future visits.

Select the **Visit Note** button to start mobile documentation inside the mobile app.
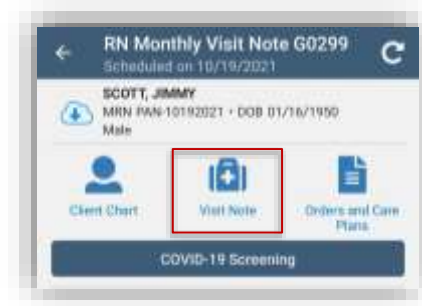
Below is a Skilled Nurse Visit. The visit is split up into categories. If available with permission, users can select the **Load Previous** button to load the previously completed notes and update the changes.
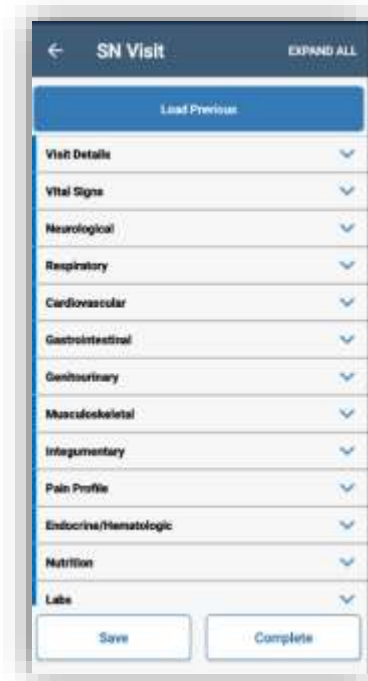
Select the category to expand the section or select **EXPAND ALL** in the top right to open every category at once. Tap **COLLAPSE ALL** to minimize all categories at once.
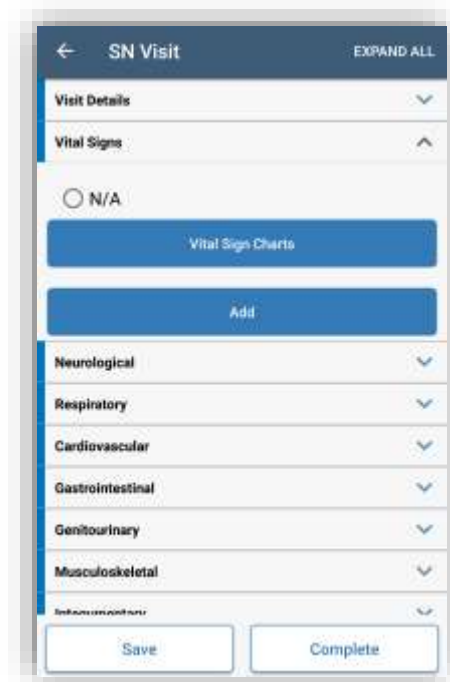
Below shows how users enter vital signs.

Some sections allow for entering comments, and other categories like Interventions can enter templates inside the comments section. Enter a keyword inside the search templates section and then select the applicable template.
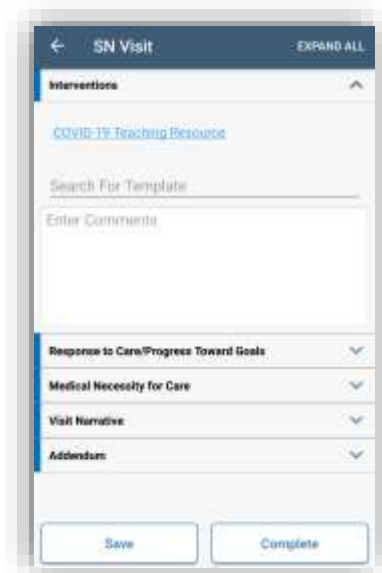
Some sections have buttons that must be completed in the web application and not the mobile application.
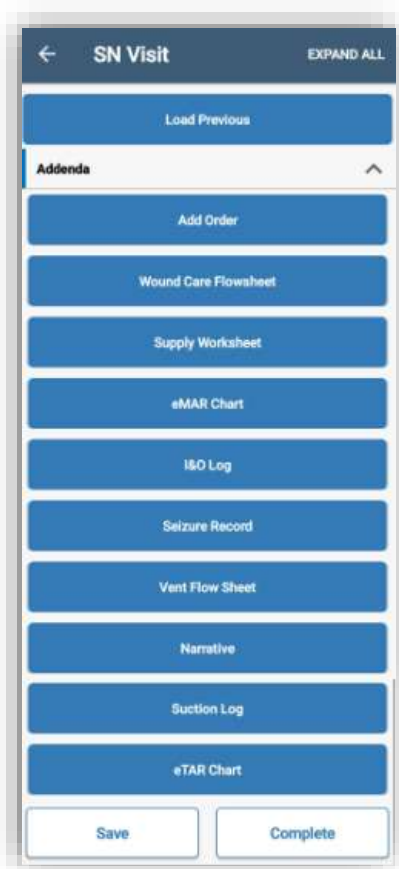
Users will see the following notification.
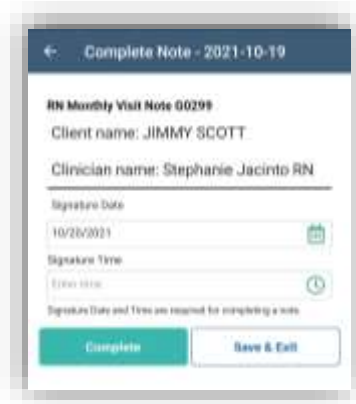
When documenting care in the Axxess Home Care mobile app, users can see the total number of errors in their documentation and follow step-by-step guidance on how to correct each error. Once a user finish documenting and selects **Complete**, guided validations appear.

Errors are highlighted in red with messages identifying how to correct each error. The total number of errors is provided in the red ribbon banner at the bottom of the note, and arrows in the bottom right corner enable users to navigate through each of the validation errors.
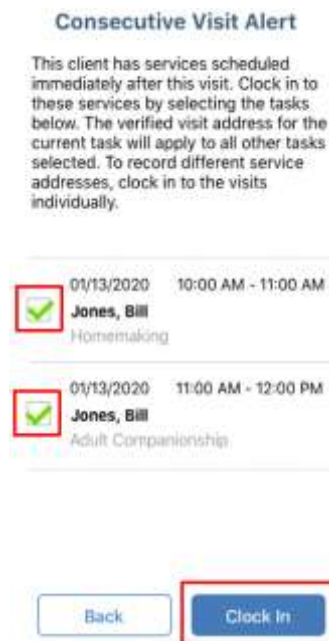
Select **Complete** in the bottom left when finished. Confirm the signature date and enter the signature time, then select the **Complete** button.

Once the signature has been entered, select **Submit**. A confirmation message will appear. Tap **OK**.

Consecutive Visits

To clock in and out for multiple consecutive visits at once, the caregiver must have two or more visits scheduled back-to-back for the same client. To clock in, select the earliest of the consecutive visits. On the selected visit screen, confirm that all information is accurate and select **Clock In**. If consecutive visits are scheduled, the **Consecutive Visit Alert** appears. Check the boxes next to the desired visits and select **Clock In**.

Users can cancel EVV clocking by selecting **Cancel** on the visit screen next to **Clock Out**. To cancel EVV clocking for multiple consecutive visits, caregivers

must cancel each consecutive visit individually. Once the visits have been completed, select **Clock Out.** Selecting **Clock Out** triggers the **Time Review** screen where caregivers can review **Verified Time In** and **Verified Time Out** for the completed visits.

The **Task Ended** field accommodates consecutive visits that start and end at different locations. To document visits that started and ended at different locations, click the arrow next to **Task Ended** and select the address where the last visit ended.

On the right side of the **Time Review** screen, enter the duration of each visit. The **Entered Time** will update in the bottom right corner as each visit duration is entered. In the bottom left, the **Total Time** reflects the time span from **Verified Time In** to **Verified Time Out**. To facilitate EVV compliance, the system prevents users from collecting the client's signature until the **Entered Time** and **Total Time** match.

Once the Entered and Total Times match, tap **Collect Client Signature** and sign and submit.

MENU

Select the three-line Menu button in the top left.
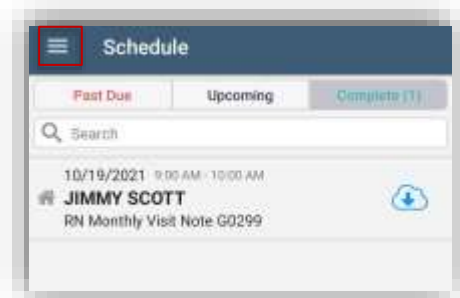
The options are **Schedule**, **Messages**, **My Clients**, **Help**, **Switch Agency**, **Log Out** and **Settings**. **Logout** will leave the app. A login will be required to get back in. Select outside of the side menu to collapse the menu.
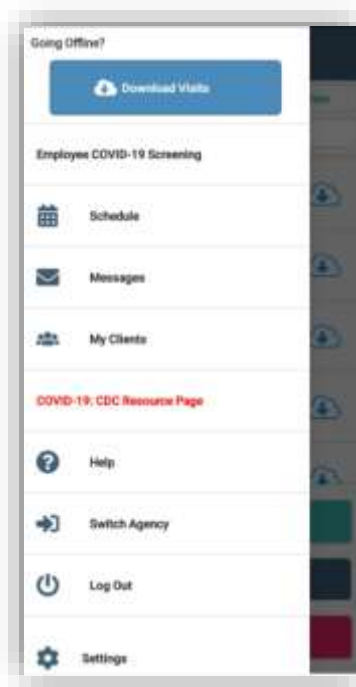
Select the **Download Visits** button and all visits for the current day and subsequent two days will download automatically.

DOWNLOADED VISITS

To use offline functionality, caregivers must first download upcoming visits that will be performed in areas without internet connectivity. To download visits, open the Axxess Home Care mobile app while still connected to the internet. Visits listed in **Schedule** can be downloaded by selecting the blue cloud icon to the right of the visit.


Once a visit has been downloaded, the ⬇ icon changes to an ✅ icon to indicate a successful download. Before going offline, confirm that all the necessary visits have green cloud icons indicating that they have been downloaded. Once all necessary visits have been downloaded, the user can go offline but must stay logged in to the Axxess Home Care app on the mobile device.

When the user has gone offline, a yellow banner will appear at the top of the screen to indicate that the user is offline, and the network connection has been lost. Visits that have not been downloaded appear with grey cloud icons indicating that they cannot be downloaded or performed offline.
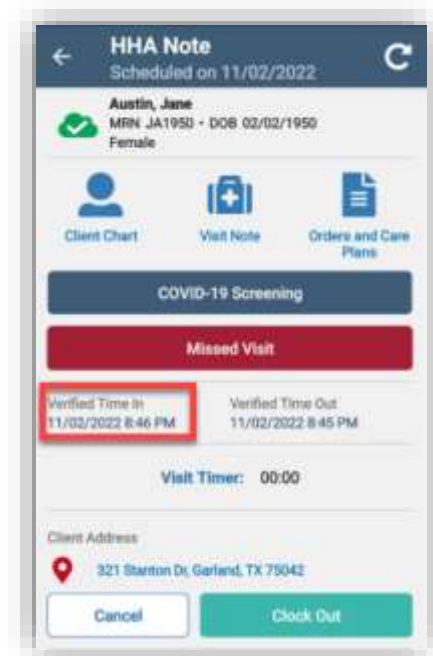

Select a visit to start offline documentation and/or EVV. Only visits with green cloud icons can be performed offline. To use offline EVV only, select the visit from the upcoming visits list and select **Clock In** on the start task screen.
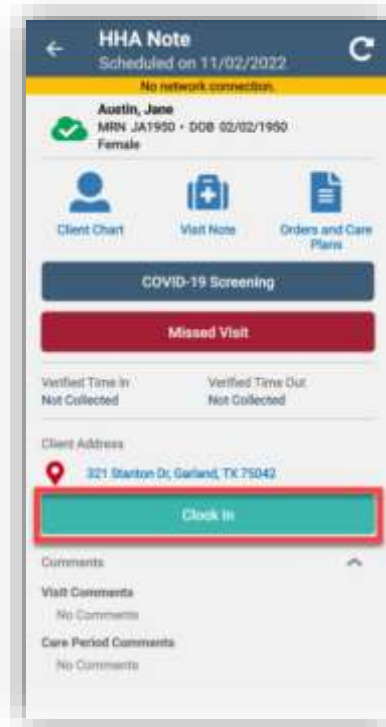
Select the **back arrow** in the top left corner of the screen.

The **Verified Time In** will populate.

To end EVV for a visit, select **Clock Out**. On the Visit Verification screen, the text box under "End Visit Location Does Not Match Client Address" enables users to document the reason that EVV location was not used.

Offline Documentation

After opening a visit on the mobile app, select **Visit Note** to start documenting offline. Document on the note as usual. When the visit is finished, select **Save** or **Complete**. When either button is selected, a message will confirm that offline documentation has been saved, but the note cannot be completed until the user is back online.

Once the visit is saved and connectivity is restored, the visit data must be synced. To sync the data, select the three-line menu in the top left corner and tap **PENDING SYNC**.


Sync items individually by selecting the ⬆️ icon or sync all items at once by selecting **Upload All**. Once visit data is successfully synced, the visit will no longer appear in the **Pending Sync** window.
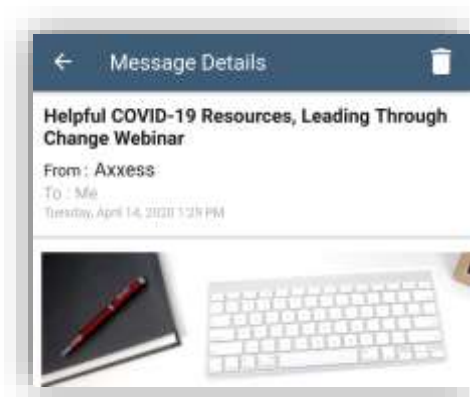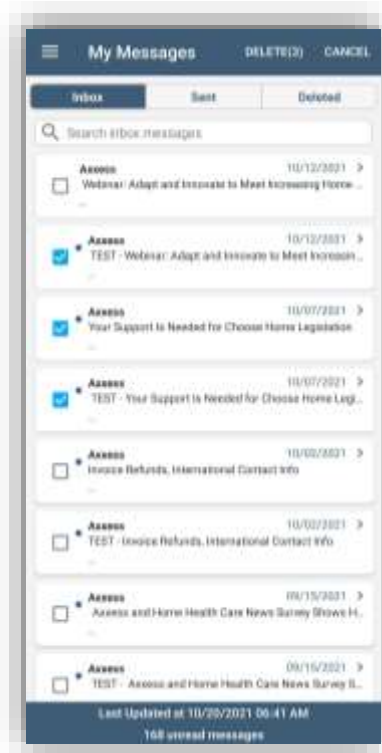

MESSAGES

Select **Messages**. This is the HIPAA-compliant, intra-organization messaging feature. Messages are separated into three tabs: **Inbox**, **Sent** and **Deleted** (blue tab when viewing). The bottom of the page will show the last time the messages were up to date, along with the total number of unread messages. Unread messages have a blue dot to the left. Swipe down to refresh the screen. To search through the messages, start typing in the text space below the tabs.
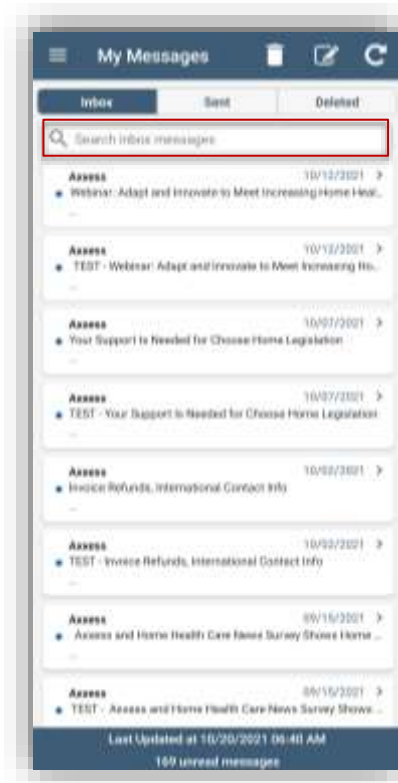
Select a message to view. Select the ▢ icon at the top to remove the message. After deleting, a notification will say the message is being deleted. Select the back arrow in the top left to get back to message list.


From **My Messages**, users can delete multiple visits at the same time. Select the trash icon at the top. Then select one or more messages. They will have blue check marks to the left. Choose all messages to be removed, then select **DELETE** at the bottom of the page. The number in parentheses is how many messages are selected. The messages will then move to the **Deleted** tab.

To compose a new message, select the [icon] icon. Start typing the name of the user in the "To" section. To search through the list of users, select the blue plus icon on the right.

Search through the list by users or tags. Select the user or tag to be included in the message.
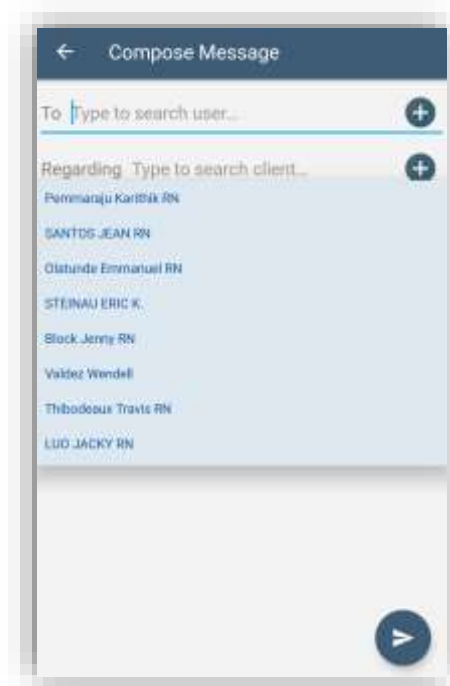

The regarding field lets users indicate if the message relates to a specific client. This is accomplished by typing their name in the "Regarding" section or selecting the blue plus sign to the right to search for one. Type in a "Subject", then continue with the body text of the message. Attachments can also be added by selecting the 📎 icon in the top right. Choose to either take a photo on the app by selecting **From Camera** or use an image already on the device by selecting **From File**.
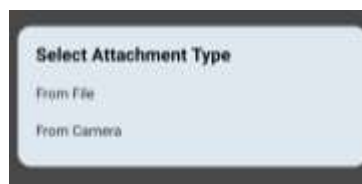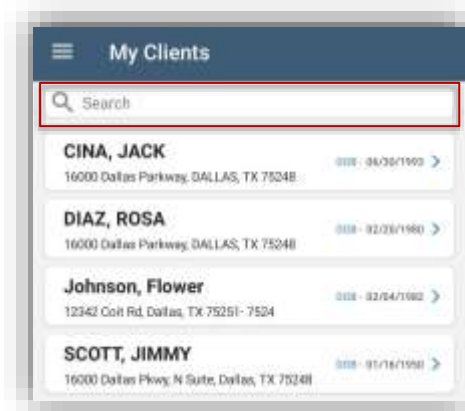

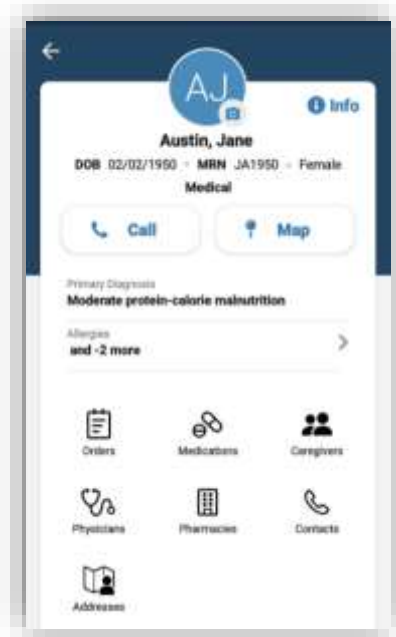When the message is complete, select the ➤ icon.

MY CLIENTS

My Clients is listed after **Messages**. Users can search and view their list of clients.
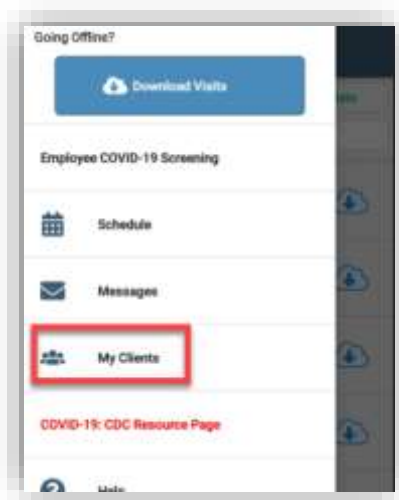
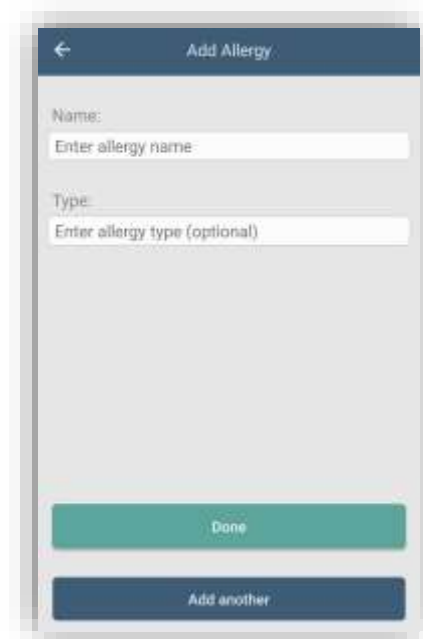Enter the first or last name of the client in the search bar.

Once the requested client has been found, select the name to view the client profile.
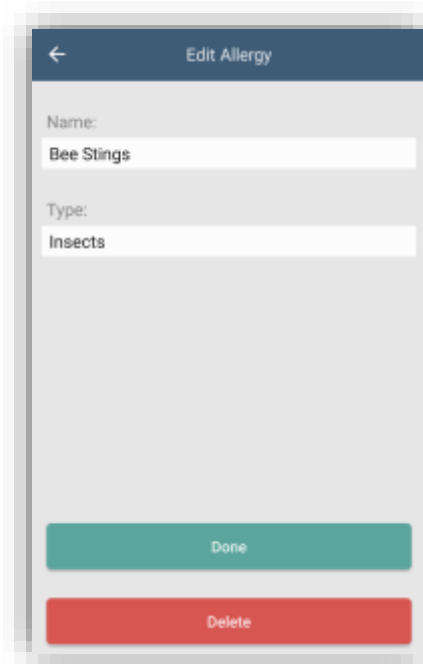
Select **Allergies** to make updates to the allergies list.

Select **Add Allergy** to add additional allergies. Enter the name and select inside the type box to see a list of categories. When finished, select the **Done** button or select **Add Another** button to add more allergies.

From the allergies list screen, select any active allergies to make edits to. When completed, select **Done**. Select the **Delete** button to remove.
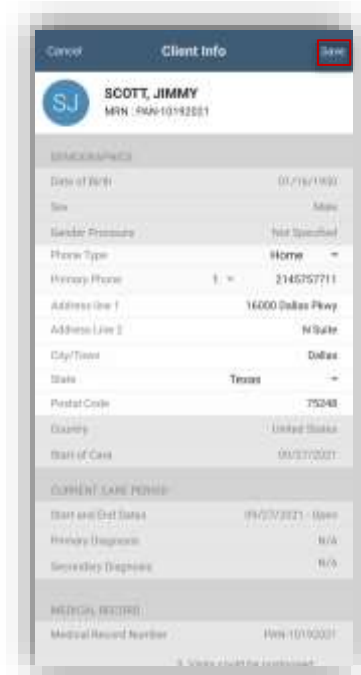

Select any deleted allergies. Once selected, select the **Restore** button to turn into an active allergy.
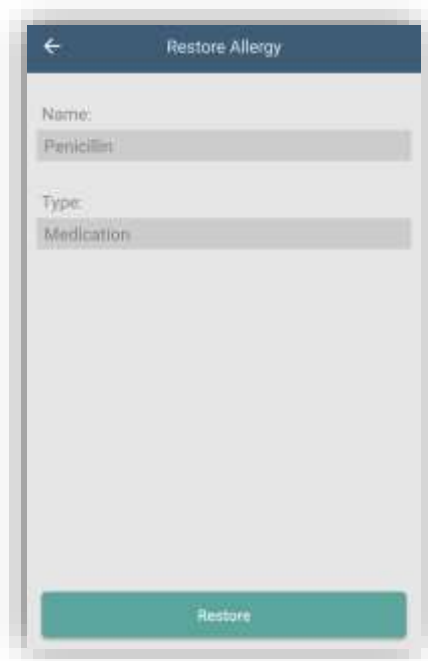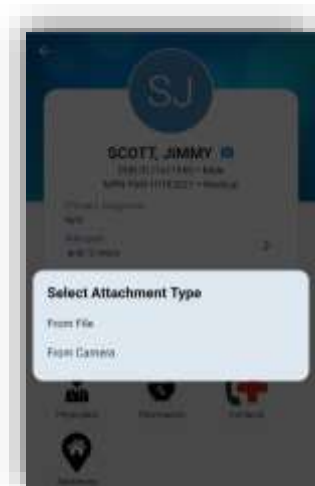
From the profile, users can view specific client info, including demographics, medical records, etc. by selecting **Info**.

Select **Edit** to make updates. Once updated, select **Save**.

From the profile, users can add a client profile image from the library or camera by selecting the icon.

Navigate to the client's location by selecting the **Map** button and Google Maps will automatically open. Users can also call the client's directly from the Client Profile by selecting the **Call** button.
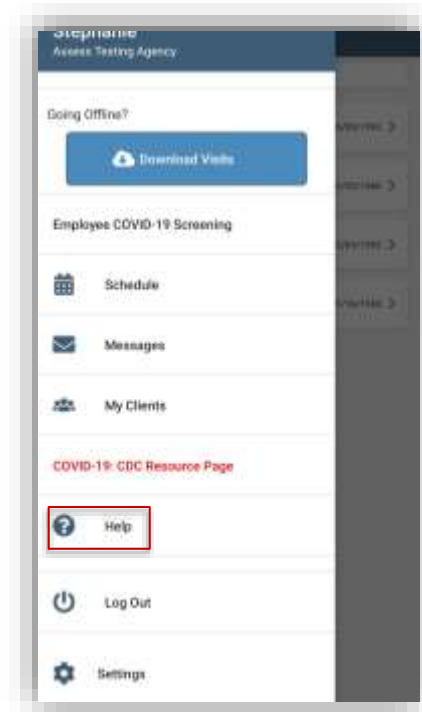
Select **Orders, Medications, Caregivers, Physicians, Pharmacies, Contacts** and **Addresses** to view lists. Contacts has quick links to call directly from the app.
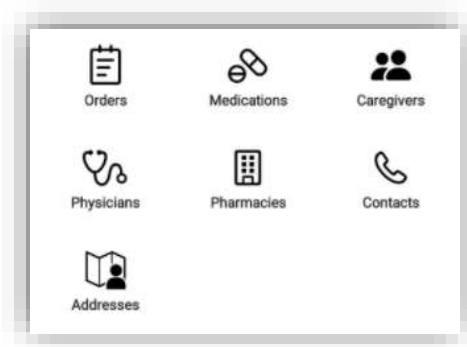
HELP
The **Help** section is found on the Home menu.

The top section is for resetting the password. Enter the email address associated with the account and select **Reset Password**. Axxess Support is available Monday - Friday from 5:00 a.m. to 9:00 p.m. CT. Select **Call Us** for assistance.

LOG OUT AND SETTINGS

The Log Out and Settings areas are found on the Home menu. After logging out, go the Axxess Home Care mobile app to get back in and enter passcode to resume. **Settings** will let users decide if they would like to use only Wi-Fi for downloading/syncing by switching on (default is off).

Caregivers can set their mobile devices to Spanish to view Spanish translations. Once the primary language on a caregiver's device is set to Spanish, the caregiver can log in to the mobile app to view menu items, error messages and labels in Spanish.