

# **HOME CARE ADMINISTRATOR TRAINING MANUAL**

December 2022

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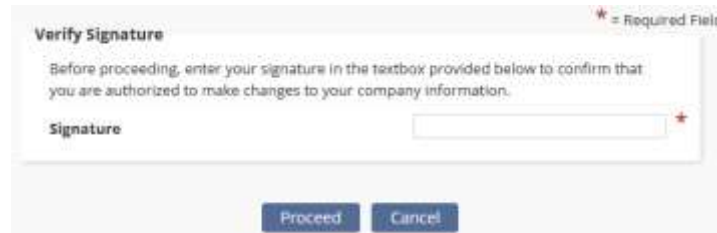
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## COMPANY SETUP

### Admin/Company Setup

The following window opens and requires the Signature of someone with a specific permission (found in *Edit User/Permissions/Administration/Agency*) in their user profile. After entering the Signature, select the **Proceed** button.



Verify Signature \* = Required Field

Before proceeding, enter your signature in the textbox provided below to confirm that you are authorized to make changes to your company information.

Signature

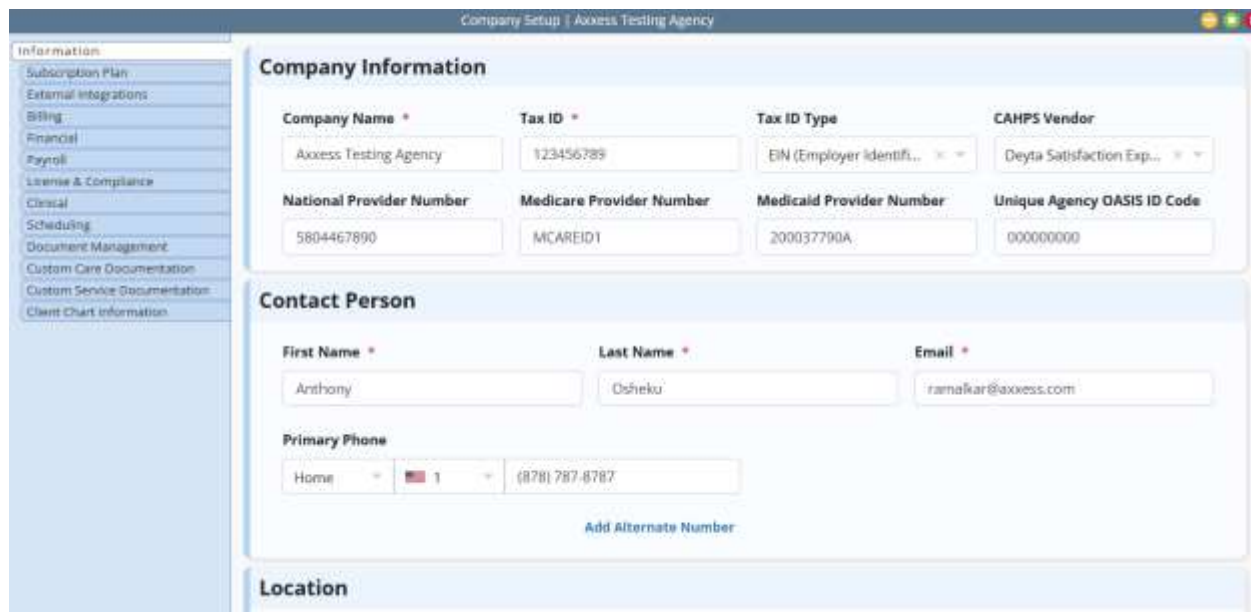
Proceed Cancel

**NOTE:** For updating the signature, see [Office Overview](#).

Company Setup is split into thirteen tabs found on the left side of the window.

**Information** - Where users enter the agency's information. ID's and Provider Numbers are retrieved outside of Axxess.

**NOTE:** Anything with a red asterisk (\*) means the information is required to save the page.



Company Setup | Axxess Testing Agency

Information

- Subscription Plan
- External Integrations
- Billing
- Financial
- Payroll
- License & Compliance
- Clinical
- Scheduling
- Document Management
- Custom Care Documentation
- Custom Service Documentation
- Client Chart Information

### Company Information

Company Name *	Tax ID *	Tax ID Type	CAHPS Vendor
Access Testing Agency	123456789	EIN (Employer Identifi...	Deyta Satisfaction Exp...
National Provider Number	Medicare Provider Number	Medicaid Provider Number	Unique Agency OASIS ID Code
5804467890	MCAREID1	200037790A	000000000

### Contact Person

First Name *	Last Name *	Email *
Anthony	Oshetu	ramafkar@axxess.com
Primary Phone		
Home	1	(878) 287-8787
<a href="#">Add Alternate Number</a>		

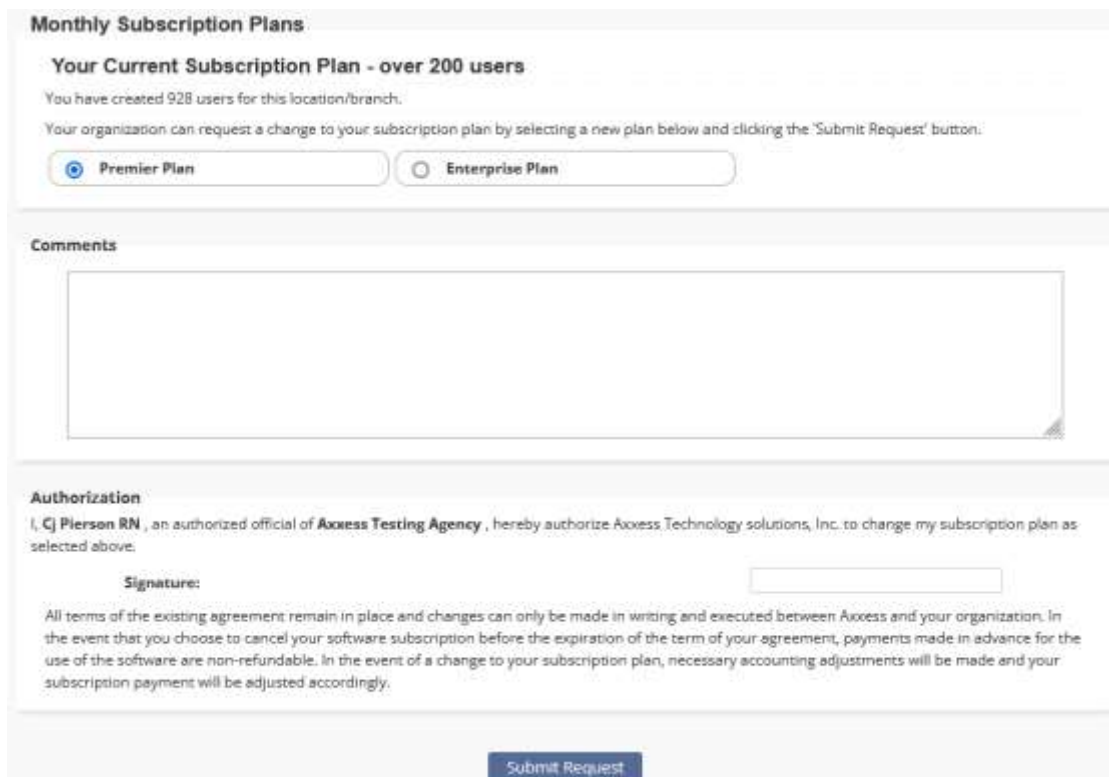
### Location

Select the following buttons to toggle through the Company Setup window.



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

**Subscription Plan** - In this section, the current monthly subscription plan is shown. This plan is based on the number of users and/or active census and can be adjusted by submitting a written request in the comments section. Enter the user's electronic signature and select the **Submit Request** button. Upgrade the plan can only be done through the request form here, if users wish to downgrade their plan, enter a ticket in the Support Ticketing Center.



The screenshot shows a web form titled "Monthly Subscription Plans". It includes a section for the current plan ("Your Current Subscription Plan - over 200 users") with a note about 928 users. Below this are two radio buttons for "Premier Plan" (selected) and "Enterprise Plan". A "Comments" section contains a large text area. The "Authorization" section features a signature line with a text input field and a disclaimer. At the bottom is a "Submit Request" button.

**Electronic Visit Verification** - The organization can connect their home care application to select outside vendors for services like Electronic Visit Verification (EVV). Enter the required information such as the provider, branches, state and payment source to connect (required information changes with integration).

Electronic Visit Verification [Remove Provider](#)

Provider: Utah Medicaid Branches: Addison Branch Location Dallas

State: Utah Payment Source: Integrated Test QA Insurance- RA

Note: This provider setup enables users to populate specific branches and payers in the Utah Medicaid report under Electronic Visit Verification Reports.

---

Provider: Teflus Solutions, LLC [Remove Provider](#)

State: Florida Branches: Dallas

Payment Source: Sunshine FL, Auto Insurance, MEDICAD, Medicaid FL, Missa's Test

Effective Date: 11/04/2020

Submit visits to Teflus in Completed status. [?](#)

Submit visits to Teflus in Completed-Hold status. [?](#)

**Billing** - This window enables users to decide billing settings. Indicate the weekly billing cycle, enable alternate remittance addresses and then fill in the address. Hover over the information [?](#) icon to get insight into questions.

**Billing**

Billing Week: Sunday-Saturday

Alternate Remittance Addresses  
\* Remember to save at the bottom of the form after adding or changing addresses

Enable  Disable

Address Type:  Claim  Invoice  Both Name: Dallas2

Country: United States Address Line 1: 16800 Litj NW

Address Line 2: SITE 600 City/Town: DALLAS

State: TX Postal Code: 75215 - 7521

Insert modifiable invoice columns and choose the number sequence. Add invoice comments by selecting the **Add New** button. Edit, remove or make default comments that have been previously added by selecting the corresponding

icons. If the organization wants to have a personal invoice message, check the box and fill out the subject line and body of the message.

### Invoice

**Modifiable Invoice Columns**

Line Number \* Description \* Date \* Hours \*  
and 1 more

**Invoice Number Sequence**

4837

**Invoice Comments**

[Add New](#)

Name	Comment	Actions
Standard	Thank you for trusting your care to the team of Axxess Testing Agency. We appreciate your business.	<a href="#">✎</a> <a href="#">✖</a>
Past Due	Your account is past due. Please remit payment immediately.	<a href="#">Make Default</a> <a href="#">✎</a> <a href="#">✖</a>
test	test test	<a href="#">Make Default</a> <a href="#">✎</a> <a href="#">✖</a>
Tianny's Invoice	For testing purposes.	<a href="#">Make Default</a> <a href="#">✎</a> <a href="#">✖</a>

**Email Message**

**Subject Line \***

Axxess Healthcare Invoice

**Body \***

Please submit payment to Axxess:  
16000 Dallas Pkwy #700n, Dallas, TX 75248

You have 426 characters remaining

Enable remittance posting to manage remittance and electronic fund transfer payments in a central location and then selecting the date to begin use.

### Remittance Posting

Remittance posting enables users to manage remittance and electronic fund transfer payments in a central location. Once enabled, users can post line item payments and adjustments from the Remittance Advice screen under the Billing tab. ⓘ

Enable
  Disable

Claims and selected invoices billed on or after this date must be processed through the Remittance Advice screen.

**Use remittance posting for claims billed on or after:**

11/01/2021

Enter new payer categories by selecting the **Add Payer Category** button. Once added, select the corresponding **Edit** and **Delete** hyperlinks to update.

**Payer Categories** Add Payer Category

NOTE: You can perform 'Edit' and 'Delete' actions on only one row at a time.

Payer Category Name	Payer Types	Actions
Contract/Staffing	Staffing, Contract	<a href="#">Edit</a> <a href="#">Delete</a>
Self-pay	Self-pay	<a href="#">Edit</a> <a href="#">Delete</a>
Medicare	Medicare (HMO/managed care), Medicare (traditional fee-for-service)	<a href="#">Edit</a> <a href="#">Delete</a>
medicaid	Medicaid (traditional fee-for-service), Medicaid (HMO/managed care)	<a href="#">Edit</a> <a href="#">Delete</a>
LTC Payer	LTC Insurance	<a href="#">Edit</a> <a href="#">Delete</a>
Other	Unknown, Other government, None, Title programs, Other(specify)	<a href="#">Edit</a> <a href="#">Delete</a>
Commercial Insurance	Workers compensation, Private/Commercial insurance, Private/Commercial HMO/managed care	<a href="#">Edit</a> <a href="#">Delete</a>

Determine the EVV time management settings. Decide how long the first and second alert will be for late arrivals and departures (in minutes) and who will be notified. Then determine whether the Axxess Home Care mobile app will allow for manual time entry or whether EVV will be the actual visit time.

**EVV Time Management**

**Late Arrival Alerts (Alert Center)**

First Alert ⓘ  \*  Second Alert ⓘ  \*

**Late Departure Alerts (Alert Center)**

First Alert ⓘ  \*  Second Alert ⓘ  \*

**User Notification Manager ⓘ**

**Mobile App Visit Time**

Allow manual entry of actual visit time. ⓘ

Use EVV times as actual visit time. ⓘ

**Financial** - Choose a date through which accounts are closed. Axxess will require an electronic signature from authorized personnel when saving a transaction date on or before the closing date. Select the Disable Closing Date checkbox to let users edit any records regardless of the closing date.



### Closed Accounting

**Date through which books are closed:** Date not set

Axxess will require an electronic signature from authorized personnel when saving a transaction dated on or before the closing date.

**Closing Date:**

**Disable Closing Date**

**Warning:** Disabling this feature will let users edit any records, regardless of closing date.

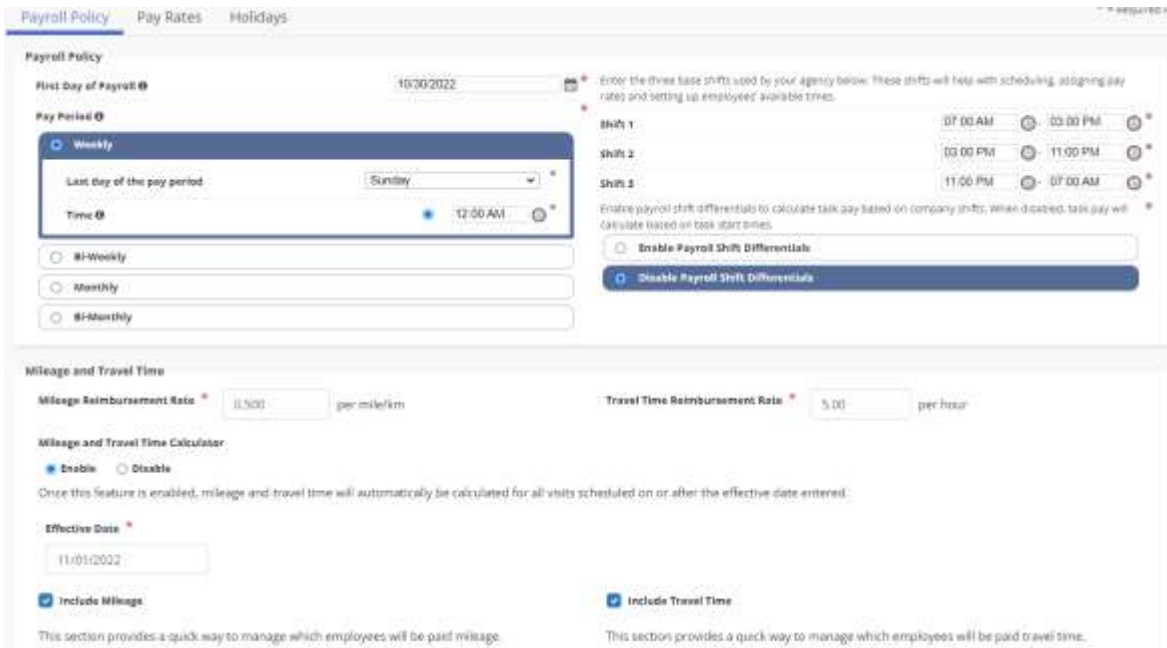
The Chart of Accounts Mapping enables users to assign account numbers based on the organization's accounting system which flow to the General Ledger report.

### Chart of Accounts Mapping i

10010	Cash	40100	Revenue - Self-pay	60060	Wages - Medicaid (traditional fee-for-service)
11110	Accounts Receivable - Trade	40130	Revenue - Other(specify)	60080	Wages - Title programs
11140	Unbilled AR	40170	Revenue - Unknown	60090	Wages - Other government
21030	Accrued Payroll	40110	Revenue - Contract	60010	Wages - Private/Commercial insurance
40160	Revenue - None	40122	Revenue - Workers compensation	60180	Wages - Private/Commercial HMO/managed care
40050	Revenue - Medicare (HMO/managed care)	40140	Revenue - Staffing	60100	Wages - Self-pay
40040	Revenue - Medicare (traditional fee-for-service)	40150	Revenue - LTC Insurance	60130	Wages - Other(specify)

## Payroll

**Payroll Policy** - Determine how and when employees will be paid when it comes to mileage, travel time, payroll date and cycle. Also, determine what will be listed as the three base shifts of the day.



Enter the mileage and travel time reimbursement rates. Decide to enable the mileage and travel time calculator. When enabled, choose an effective date and decide if it will include mileage and/or travel time. Then decide which of the organization’s employees will be allowed to manage paid mileage and/or paid travel time.

Determine if the organization will round start or end time for shifts (selecting ‘none’ is available). Enable unpaid meal breaks and set up shift duration requirements.

Enter the maximum and defaults if the organization pays overtime. Add municipalities by selecting the **Add Municipality** button if employees are paid a certain rate per region. After they have been added, they can be edited or removed by selecting **Edit** and **Delete**.

Maximum Time/Overtime Defaults

Maximum Daily Limit: 8 Hours  
 None  Warning Message  Error & Stop Scheduling \*

Maximum Weekly Limit: 40 Hours  
 None  Warning Message  Error & Stop Scheduling \*

Time-and-a-Half Daily Limit: 9 Hours  
 None  Warning Message  Error & Stop Scheduling \*

Time-and-a-Half Weekly Limit: 16 Hours  
 None  Warning Message  Error & Stop Scheduling \*

Double Time Daily Limit: 12 Hours  
 None  Warning Message  Error & Stop Scheduling \*

Double Time Weekly Limit: 20 Hours  
 None  Warning Message  Error & Stop Scheduling \*

Manage Municipalities

Filter by Text

Name	Code	Pay Rate	Actions
75418- Dallas	01	\$25.00	Edit   Delete
Addison Branch	12	\$27.00	Edit   Delete
Dade	Dad	\$15.00	Edit   Delete
Delaware Municipality	000	\$20.00	Edit   Delete

**Pay Rates** – Set up organization pay rates for all employees. Individual pay rates can be added under the **Employee Center**. Use the section at the top of the page to filter for specific Employee, Payment Source, Client and/or Task status by selecting one or multiple drop-down menus. Then select **Generate**. The legend below the filter explains that in the main section of the tab, the default rate will be shaded blue and the specific rate will show as green. The orange exclamation point will indicate “A rate will override this in the future” and the green exclamation point indicates that a “Future rate has been applied.”

Branch \*  Employee

Payment Source  Client

Task status



Default Rate 
  Specific Rate 
  ! A rate will override this in the future 
  ! Future rate has been applied

The main stage of the tab displays how a task is paid per day

Task	Sun	Mon	Tue	Wed	Thu	Fri	Sat
AV-HHA visit	\$15.00/hour	\$15.00/hour	\$15.00/hour	\$15.00/hour	\$15.00/hour	\$15.00/hour	\$15.00/hour
CG1 Standard Visit	\$4.00/15 min 7:00 am-3:00 pm				\$3.00/15 min 7:00 am-11:00 pm	\$3.00/15 min 7:00 am-11:00 pm	\$4.00/15 min 7:00 am-3:00 pm
	\$5.00/15 min 3:00 pm-11:00 pm						\$5.00/15 min 3:00 pm-11:00 pm
	\$6.00/15 min 11:00 pm-7:00 am						\$6.00/15 min 11:00 pm-7:00 am
Coordination Of Care	\$17.00/visit	\$35.00/visit 7:00 am-3:00 pm	\$35.00/visit 7:00 am-3:00 pm	\$35.00/visit 7:00 am-3:00 pm	\$35.00/visit 7:00 am-3:00 pm	\$35.00/visit 7:00 am-3:00 pm	\$17.00/visit

Hovering over a rate will give you more specifics about the rate and select the **Edit** or **Delete** hyperlinks to make updates.

RATE HISTORY					
Rate	Mileage Rate	Travel Rate	Shift	Effective Date	Actions
\$3.00	\$0.42(Default)	\$7.00(Default)	7:00 am-11:00 pm		<a href="#">Edit</a>   <a href="#">Delete</a>

Select the **New** button in the top right to add a rate. Choose the branch (if more than one) and task from the drop-down, enter the dollar amount, choose the time type, and enter the effective date or select the calendar icon. Then select the box to determine which employee, payment source and/or client for which the rate is applicable. To search for a specific employee, payment source and/or client, enter keywords for search. Select the All checkbox(es) if the rate applies to all employees, payment sources and/or clients. Then decide if the rate applies to a specific shift or days of the week. Select the green check mark  icon if the rate applies to all shifts and/or days. Select the red X  icon to uncheck all boxes. Determine if the pay rate should include mileage and/or travel time. If either box is selected, enter the rate. If they are not checked, the default payroll policy rate will be applied for mileage and travel time. Select **Save & Close** to complete. Select **Save & Add Another** to enter additional rates.

### New Pay Rate

<b>Branch *</b>	<b>Task *</b>
Select Branches	Select...
<b>Rate *</b>	<b>Effective Date</b>
	Type or Select
<b>Employee</b>	<input checked="" type="checkbox"/> All
<b>Payment Source</b>	<input checked="" type="checkbox"/> All
<b>Client</b>	<input checked="" type="checkbox"/> All
<b>Shifts *</b>	<b>Days of the Week *</b>
Select...	Select...
<input type="checkbox"/> <b>Mileage Rate</b> - If not selected, the agency's default rate of 0.55/mile will be used.	
<input type="checkbox"/> <b>Travel Time Rate</b> - If not selected, the agency's default rate of 7/hr will be used.	

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

**Holidays** – Users can enter default holidays or create their own organization-specific holidays. Holidays can be edited, deleted and/or deactivated by selecting any of the hyperlinks. Select **Add Default Holidays** to choose from the following list:

- Inauguration Day
- Washington's Birthday
- Easter Sunday
- Independence Day
- Labor Day
- Columbus Day
- Veterans Day
- Thanksgiving Day
- Christmas Eve

Choose time and rules then select **Add Holidays** to add to the rest of the list. Select **New** to add an organization-specific holiday.

Name	Shifts	Occurrence Rule	Next Date	Travel Time	Actions
Christmas Day	One, Two, Three	Every December 25	12/25/2022	✗	Edit   Delete   Deactivate
Christmas Eve	One, Two, Three	Every December 24	12/24/2022	✗	Edit   Delete   Deactivate
Test Holiday	One	Every December 24	12/24/2022	✗	Edit   Delete   Deactivate
Day After Thanksgiving (Black Friday)	One, Two, Three	The Fourth Thursday in November, 1 Day Offset	11/25/2022	✗	Edit   Delete   Deactivate
Thanksgiving Day	One, Two, Three	The Fourth Thursday in November	11/24/2022	✗	Edit   Delete   Deactivate
Veterans Day	One, Two, Three	Every November 11	11/11/2022	✗	Edit   Delete   Deactivate

Enter the payroll holiday name, then decide how often the holiday will occur and the time. Then determine whether the holiday follows specific rules. Select **Save** once completed.

**Create Payroll Holiday**

Name:

Occurrences:

Fixed

Floating

Easter

Time:

Use Shifts

Use Custom Time

Rules

Pay rules apply to travel time

Applies to All Tasks and Travel Time

Multiplier

Applies to All Except Per Visit Tasks

Additional Per Hour

Applies to Per Visit Tasks

Additional Per Visit

For Hourly and Per-15-Minute tasks, rules apply to fractional hours (e.g. 1.25 hours).

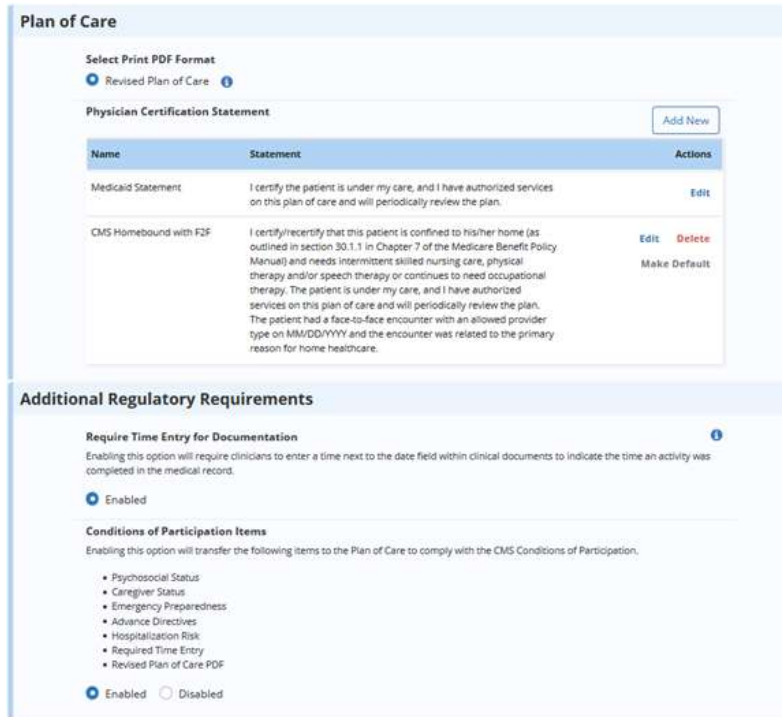
**NOTE:** The License, Scheduling, Document Management, Custom Care Documentation and Custom Service Documentation tabs have search functionality at the top of the screen to narrow down results. There are also options in some tabs to filter between active or inactive entries.

Click Save Changes to save any edits, deletions or new information you add to the grid below.

**License & Compliance** - Enables organizations to manage licenses or compliance items that must be completed/updated. Select **Add New Type of License/Compliance** and a free text space will open below. Enter the name, then select **Save Changes**. If any licenses were added in error, select **Delete**.



**Clinical** - Determine the print PDF format for the Plan of Care. There are options to **Add New, Edit, Make Default** or **Delete** the Physician Certification Statements. Enable or disable requiring clinicians to enter a time next to the date within clinical documents to indicate the time an activity was completed. Enable or disable Conditions of Participation items from transferring to Plan of Care. Enable or disable caregivers from viewing or editing documentation on a task until the date of the scheduled task. Also, determine whether to enable or disable custom service documentation.





### Documentation Requirements

**Prevent Future Documentation** ⓘ  
 Enabling this feature will prevent caregivers from viewing or editing documentation on a task until the date of the scheduled task.

Enabled  Disabled

---

### Custom Service Documentation

**Custom Service Documentation** ⓘ  
 Enabling this option activates the following set of features in the application.

- Client Services in the Quick Reports menu of Client Charts
- Service Plans in Admin Lists
- Service Plan and Service Task documents on the Document Management tab of Company Setup
- Service Scoring Lists on the Visit-Care Plan Relationships tab of Company Setup
- Service Plan/Task Association on the Visit-Care Plan Relationships tab of Company Setup
- Service Plan Reports in the Report Center under Client Reports

Enabled  Disabled

**Scheduling** - Organizations must determine if they will allow users to schedule billable tasks without an authorization and what the crossover time limit will be. Then decide to enable scheduling conflict filtering and/or fee-based scheduling.

### Scheduling

When scheduling how should billable tasks with no authorizations found affect the process?

Warn the scheduler, and provide an option to continue scheduling tasks outside of authorization parameters.

Alert the scheduler and prevent scheduling outside of authorizations.

Crossover time limit for visits to appear as a multi-day visit?  ⓘ

Enable Scheduling Conflict Filtering ⓘ

Enable Fee-Based Scheduling ⓘ

The family care settings must be selected. Choose whether to turn on the Client Advocate Role, Family Provider Limits and Prevent Scheduling features. Specific branches can also be added to have custom limits.

### Family Care

**Client Advocate Role**  
 Selecting this feature activates the Client Advocate role in the employee file and the ability to designate advocates in the client file.

**Family Provider Limits** ⓘ  
 This feature enables limits to be set on the number of weekly hours select caregivers can provide care. The limit will not apply to caregivers that you do not identify in the Family Providers section of the client chart.

**Default Limit**

**Prevent Scheduling**  
 Select to restrict scheduling beyond the default limit. A warning message will display when prevent scheduling is not selected.

**Custom Provider Limits**

**Add New, Edit and Deactivate** visit types in Visit Management.



Visit Management

Active Inactive Add New

Category	Type	Reason	Created	Modified	Actions
Missed Visit	Employee	Availability	09/24/2013	09/24/2013	Edit Deactivate
Missed Visit	Employee	Bereavement	09/24/2013	09/24/2013	Edit Deactivate
Reassign	Employee	Bereavement	09/24/2013	09/24/2013	Edit Deactivate
Missed Visit	Client	Cancellation of Care	09/24/2013	09/24/2013	Edit Deactivate
Missed Visit	Client	Caregiver Able To Assist Client	09/24/2013	09/24/2013	Edit Deactivate
Missed Visit	Client	Client Reason CE	02/10/2021	02/10/2021	Edit Deactivate
Reassign	Employee	Client Compatibility	09/24/2013	09/24/2013	Edit Deactivate
Missed Visit	Employee	Client Compatibility	09/24/2013	09/24/2013	Edit Deactivate
Missed Visit	Client	Client Hospitalized	09/24/2013	09/24/2013	Edit Deactivate
Missed Visit	Client	Client Reason RA 1	02/10/2021	02/10/2021	Edit Deactivate


1 2 3 4 5 48 total results Show 10 entries


Select **Add Custom Criteria** to limit scheduling to only those employees' meeting criteria, i.e., language, smoker and pet friendly. A free text space will open right below. Choose a category from the drop-down menu and then enter the Client and Employee Matching Criteria. Select **Save Changes** to keep the changes. If any criteria were added in error, select the **Delete** hyperlink to the right.

Add Custom Criteria Save Changes Cancel Changes

Category	Client Matching Criteria	Employee Matching Criteria	Active for Matching
Category: General			
General	Sign Language	Signs	Yes (Delete)
General	Speaks Filipino	Fluent in Filipino	Yes (Delete)
General	likes island food	can cook island food	Yes (Delete)
General	enjoys eating durian	is okay being around durian	Yes (Delete)
General	Miami County	Miami County	Yes (Delete)
General	Sign Language	Signs Language	Yes (Delete)

**Document Management** - The organization can create custom notes. Select **New** in the top right to add a custom note. Notes created here will appear in the Schedule Center, allowing staff to schedule visits.

Title	Description	Discipline	Billable	Payable	Order	Supplies	eMAR	I/O	Woun
12-Hour Tasks	12-Hour Tasks	Nursing	✓	✓	✓	✓	✓	✓	✓
24 hour visit note 	24 hour visit note	HHA	✓	✗	✗	✓	✓	✗	✗
30 Day Summary/Case Notes	30 Day Summary/Case Notes	Nursing	✓	✓	✓	✓	✓	✓	✓
60 Day Summary	60 Day Summary	ST	✓	✓	✓	✓	✓	✓	✓
AA - Compliance training	Employee mandatory training	Employee Tasks	✗	✓	✗	✗	✗	✗	✗
AA - mileage between two clients	Employee mileage between two clients	HHA	✗	✓	✗	✗	✗	✗	✗

Give the note a title, description and then choose the discipline and what type of assessment will be in the note. Any documentation choice with an  icon is available on the mobile app. Then indicate whether the note will be billable or payable, whether users can record an order, supplies used, wounds, eMAR, I/O, Seizure Record, Vent Flow Sheet, a narrative, Oxygen Risk Assessment, Adult Fall Risk Assessment and/or Pediatric Fall Risk Assessment. Select **Save** when completed. If custom notes need to be edited or no longer apply, select the **Edit** and **Deactivate** hyperlinks to make updates.

**New Custom Note**

Title:

Description:

Discipline:

Supply worksheets and wound care notes cannot be added to or removed from assessments, care plans or orders.

Documentation:

Available on the Mobile App

Billable

Payable

Record Order


Record Supplies

Record Wounds


Record eMAR

Record I/O

Record Seizures

Record Vent Flowsheet 

## Custom Care Documentation

**Daily Living Tasks** - Organizations can determine what daily living tasks that their employees can be asked to perform. Select **Add New Category** to add to the list. A free text space will appear, and a title and description must be entered. Select **Save Changes**. Select the plus sign  icon to expand the category and then select **Add New Task**. Enter the title and instructions of the task, then select **Save Changes**. Change the order by selecting either up or down arrows for tasks or categories. If any tasks or categories were added in error, select the **Delete** hyperlink to remove. The changes made in Daily Living Tasks will appear on the personalized aide note or Custom Visit Note.



The screenshot shows a web interface for managing custom care documentation. It features two main sections: 'Categories' and 'Tasks'.

**Categories Section:**

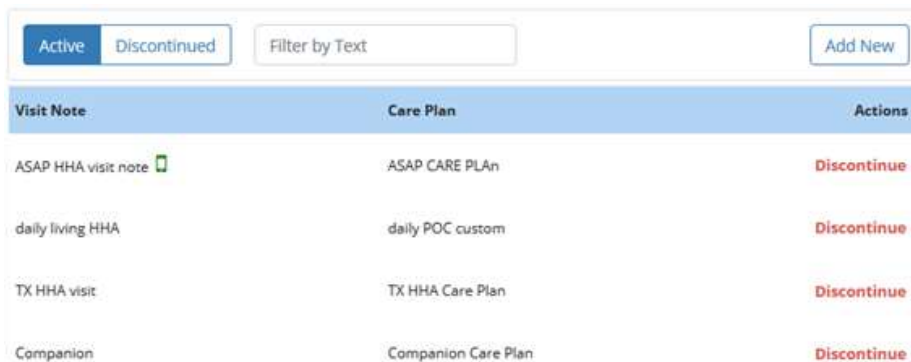
- Buttons: **Add New Category**, **Save Changes**, **Cancel Changes**
- Table with columns: **Title**, **Description**, **Delete**, and an arrow icon for reordering.
- Rows:
  - Grace Daily Living Tasks
  - Medical/Skilled Tasks
  - Companion

**Tasks Section:**


- Buttons: **Add New Task**, **Save Changes**, **Cancel Changes**
- Table with columns: **Title**, **Instructions**, **Delete**, and an arrow icon for reordering.
- Rows:
  - Walking
  - Reading

At the bottom, there is a 'Personal Care' category with a 'Delete' button and a reordering arrow.

**Care Plan/Note Associations** - Organizations can add relationships between custom visit notes and custom care plans. The **Care Plan/Note Associations** tab is automatically filtered to show active associations. Search by name in the search bar. Select **Add New** to add and link one of the combinations.



The screenshot shows the 'Care Plan/Note Associations' interface. It includes a filter section with 'Active' and 'Discontinued' buttons, a 'Filter by Text' search bar, and an 'Add New' button.

Visit Note	Care Plan	Actions
ASAP HHA visit note 	ASAP CARE PLAN	<b>Discontinue</b>
daily living HHA	daily POC custom	<b>Discontinue</b>
TX HHA visit	TX HHA Care Plan	<b>Discontinue</b>
Companion	Companion Care Plan	<b>Discontinue</b>

Choose from the drop-down menu for Visit Note and Care Plan, then select **Save & Close** or select **Save & Add Another** for additional associations. Select the **Discontinue** hyperlink if the relationship needs to be removed.

### Add Care Plan/Note Association

**Visit Note \***

**Care Plan \***

Save & Close
Save & Add Another
Cancel

**Custom Service Documentation** – Select the **Scoring List** tab to enforce score entry when a caregiver indicates the completion of a client’s goal. Select **Add New** to set up a scoring list. On the Add Scoring List window, name the list and select a scoring type. The scoring type defaults to **Yes/No**. Select **Numeric** to create a numbered scoring list. For each value, choose whether to require secondary responses. Check the box next to **Secondary Response** to require additional information from a caregiver when the respective response is selected.

Active
Discontinued

### Add Scoring List

**Name \***

**Scoring Type \*** Yes/No Numeric

**Value \***

Yes

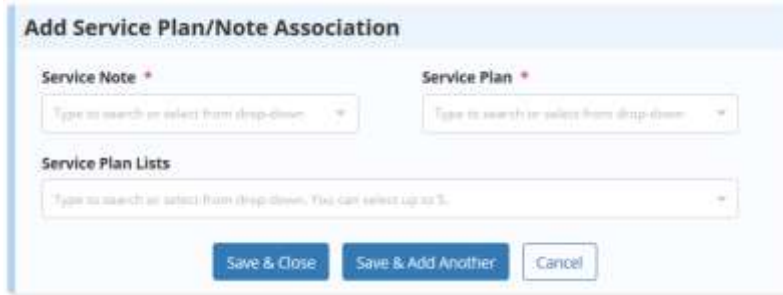
No

**Secondary Response**

Save & Close
Save & Add Another
Cancel

Name	Scoring Type	Created	Actions
Redding Scoring	Yes/No	May 01, 2020	<a href="#">View</a> <a href="#">Discontinue</a>
Darlene Scoring	Numeric	Mar 17, 2020	<a href="#">View</a> <a href="#">Discontinue</a>

Click **Save & Close** to finish or **Save & Add Another** for additional entries. Once a scoring list is created, caregivers will be required to enter a score when documenting completion of a client goal. The scoring lists will be available to link to client goals in service plans. Select **View** in the Actions column to review existing values for a particular scoring list.



The screenshot shows a form titled "Add Service Plan/Note Association". It contains three search fields: "Service Note", "Service Plan", and "Service Plan Lists". Each field has a placeholder text "Type to search or select from drop-down". Below the fields are three buttons: "Save & Close", "Save & Add Another", and "Cancel".

Select the **Service Plan/Note Associations** tab to make links following the same process as Care Plan/Note Associations but for service plans instead of care plans. The same filters and search apply. Select **Add New** to add and link one of the combinations. Choose from the drop-down menu for service note, service plan and service plan lists (up to five may be selected), then select **Save & Close** to finish or select **Save & Add Another** for additional associations. Select the **Discontinue** hyperlink if the relationship needs to be removed.

### Client Chart Information

**Emergency Triage Levels** - The organization can choose from either default triage levels or add ones of their own. Select the **Add Default Triage Levels** to add a preset triage level. Select the **Edit** or **Delete** hyperlinks to make updates. The Default Triage Levels are:

- Priority 1 - Life threatening (or potential)
- Priority 2 - Not life-threatening but would suffer severe adverse effects
- Priority 3 - Visits could be postponed 24-48 hours without adverse effects
- Priority 4 - Visits could be postponed 72-96 hours without adverse effects
- Priority 5 - Not Serious

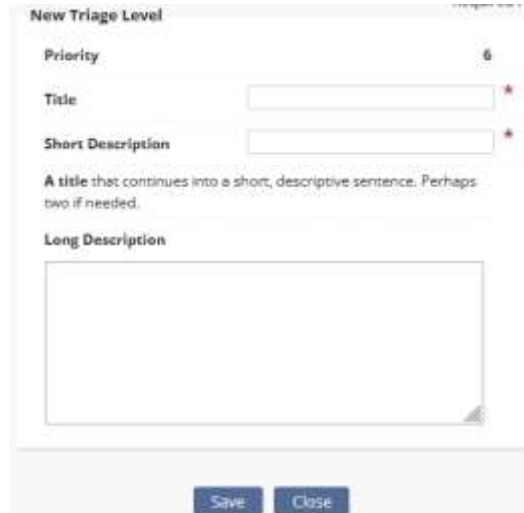
Select **New** to add an organization specific level.



The screenshot shows a table with columns for Priority, Short Description, and Actions. The table lists five default triage levels. Above the table are buttons for "New", "Add Default Triage Levels", and "Refresh".

Priority	Short Description	Actions
1	<b>Life-threatening (or potential)</b> and requires ongoing medical treatment. When necessary, appropriate arrangements for evacuation to an acute care facility will be made.	Edit   Delete
2	<b>Not life-threatening but would suffer severe adverse effects</b> from interruption of services (e.g., daily insulin, IV medications, sterile wound care of a wound with a large amount of drainage).	Edit   Delete
3	<b>Visits could be postponed 24-48 hours</b> without adverse effects (e.g., new insulin-dependent diabetic able to self-inject, sterile wound care with a minimal amount to no drainage).	Edit   Delete
4	<b>Visits could be postponed 72-96 hours</b> without adverse effects (e.g., post-op with no open wound, anticipated discharge within the next 10-14 days, routine catheter changes)	Edit   Delete
5	<b>Not Serious</b> Nothing to worry about	Edit   Delete

The priority level will default to the next number and cannot be edited. Enter a title, descriptions and select **Save**.



**Services Required** - Organizations can add default services and/or create new services. Select **Add Default Services Required** to fill the table with typical default services found in home care. Select **New** to add an organization specific service.



Name	Description	Client Type -
Speech Therapy	Speech Therapy	Medical
Skilled Nurse	Skilled Nurse	Medical
Physical Therapy	Physical Therapy	Medical
Occupational Therapy	Occupational Therapy	Medical
Medical Social Worker	Medical Social Worker	Medical
Personal Care Aide	Personal Care Aide	Non-Medical
Companion	Companion	Non-Medical
Sitter	Sitter	Non-Medical

Enter the name, choose the client type from the drop-down menu and enter a description. Select **Save** when complete.



**New Service Required** — requirement

Name  \*

Client Type -- Select -- \*

Description

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

**Durable Medical Equipment** - Organizations can add default Durable Medical Equipment (DME) and/or create new DME. Select the **Edit** or **Delete** hyperlinks to make updates to the DME list. Select **Add Default DMEs** to fill the table with typical default equipment found in home care. Select **New** to add an organization specific DME.

[New](#) [Add Default DMEs](#) [Refresh](#)

Name -	Description	Actions
Bedside Commode	Bedside Commode	<a href="#">Edit</a>   <a href="#">Delete</a>
Cane	Cane	<a href="#">Edit</a>   <a href="#">Delete</a>
Elevated Toilet Seat	Elevated Toilet Seat	<a href="#">Edit</a>   <a href="#">Delete</a>
Grab Bars	Grab Bars	<a href="#">Edit</a>   <a href="#">Delete</a>
Hospital Bed	Hospital Bed	<a href="#">Edit</a>   <a href="#">Delete</a>
Nebulzer	Nebulzer	<a href="#">Edit</a>   <a href="#">Delete</a>
Oxygen	Oxygen	<a href="#">Edit</a>   <a href="#">Delete</a>
Tub/Shower Bench	Tub/Shower Bench	<a href="#">Edit</a>   <a href="#">Delete</a>

Enter the name and description, then select **Save**.



**New Durable Medical Equipment** — requirement

Name  \*

Description

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



## ADDING A NEW USER

### *Employees/New User*

A window will open and the user's information must be entered. All asterisked items are required. The new user window is divided into seven tabs:

**Information** - Fill out the demographics of the user. The **Permissions** tab and the email address will no longer be required if the "User has access to the software" option is unchecked. Fill in all available information.

Select the **Check for User Conflict** button to prevent adding duplicate users, which will check for the user's name and date of birth.

Choose credentials and title. Select additional boxes by selecting the Agency Branch drop-down menu if the user works at more than one branch. Enter the hire date and any tags associated with the user.

**NOTE:** The tagging feature may be used in: Messaging, Employee Center and Schedule Center. Several Reports also allow for filtering and/or displaying associated tags. Tag examples include teams or location.



Other Information

Credentials  \* Employee ID

Title  \* Agency Branch  \*

Payroll Classifications

Pay Type  Employment Status

Exempt Status  Employment Type

Hire Date

Tags

Clinician Provider NPI#

Clinician Other Provider ID

There are four different payroll classifications that may be chosen by check box. Enter the ID if the user being entered is a provider. Check the box for agency defaults for maximum time/overtime, which was created in the previous section of the manual. Indicate if the mileage and/or travel time calculator should be used for the user by checking the corresponding boxes. Roles are important in the software because they determine what a user can or cannot see, select, delete or undo.

There is also a restriction function that will allow organizations to limit the times that users can use the software. For example, if the “Allow Weekend Access” box is not checked and a user attempt to log in on a Saturday, the system will not allow entry. Times can also be adjusted for the earliest time a user can log in and/or when they are automatically logged out of the Home Care application.

Select the checkbox if the user should be notified for late EVV clock in/out to the Alert Center. Enter optional comments with a 500-character limit. Select **Create & Next** to save progress and go to the next tab.

Maximum Time/Overtime

Use Agency Defaults

Mileage and Travel Time Calculator

Mileage  Travel Time

System Roles

<input type="checkbox"/> Administrator	<input type="checkbox"/> Director of Nursing	<input type="checkbox"/> Case Manager
<input type="checkbox"/> Nursing	<input type="checkbox"/> Clerk (non-clinical)	<input type="checkbox"/> Physical Therapist
<input type="checkbox"/> Speech Therapist	<input type="checkbox"/> Occupational Therapist	<input type="checkbox"/> Medical Social Worker
<input type="checkbox"/> Home Health Aide	<input type="checkbox"/> Scheduler	<input type="checkbox"/> Biller
<input type="checkbox"/> Quality Assurance	<input type="checkbox"/> Physician	<input type="checkbox"/> Office Manager
<input type="checkbox"/> Community Liaison Officer/Marketer	<input type="checkbox"/> External Referral Source	<input type="checkbox"/> Driver/Transportation
<input type="checkbox"/> Office Staff	<input type="checkbox"/> State Surveyor/Auditor	<input type="checkbox"/> Client Advocate

Access & Restrictions

Allow Weekend Access

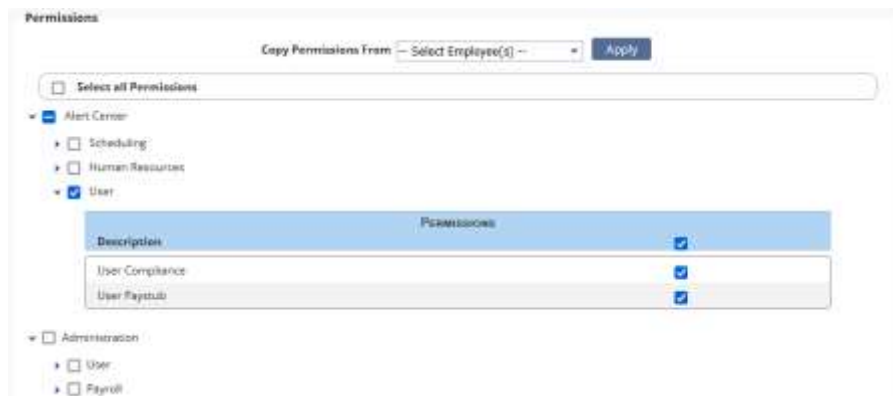
Earliest Login Time  Automatic Logout Time

Electronic Visit Verification (EVV) Time Management

Send notifications for late electronic visit verification clock in/out to the Alert Center

A green disappearing notification will display that confirms, “User has been created.”

**Permissions** - The permissions can be copied from a previously entered user using the “Copy Permissions From” drop-down menu. For example, if the organization is entering a new RN, a current on staff RN can be selected that will have the same software access. Select the **Apply** button to finish the copy. To save time, there is a “Select all Permissions” check box that will check every permission box below. There are categories, sub-categories and individual permissions. In the example below, Alert Center is the category, User is the sub-category and User Compliance is the individual permission. The categories are Alert Center, Administration, Billing Clerical, Clinical, QA (Quality Assurance) and Reports.



Description	Permissions
User Compliance	<input checked="" type="checkbox"/>
User Playstub	<input checked="" type="checkbox"/>

At the bottom of the window are five buttons that can navigate through the new user window.



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

**License & Compliance** - Organizations can keep track of a user’s licenses and compliance in this section. Select the edit or delete icons to make updates. Select the paperclip icon to view attachments. Select **New License/Compliance** to add licenses.

License Type	License Number	Category	Issue Date	Expiration Date	Attachments	Actions
RN License	123456	License/Certifications	12/22/2021	12/22/2022	AA	

1 total results Show 50 entries

Enter the license number, choose the type, category and state from the corresponding drop-down menus. Choose or enter the issue date. Then choose the timeframe of when the expire date occurs in the drop-down menu. Enter the expire date and add any scanned documents by selecting the **Browse** button and finding the file on the computer. Select Alert User or Alert HR to set a reminder in the system to follow up on the user's license or compliance. Select **Save** when complete.

### New Employee License

<b>License Number</b> <input type="text" value="License Number"/>	<b>License Type</b> <input type="text" value="Select License Types"/>	<b>Category</b> <input type="text" value="Select Category"/>	<b>State</b> <input type="text" value="Select State"/>
<b>Issue Date</b> <input type="text" value="MM/DD/YYYY"/>	<b>Expires in</b> <input type="text" value="Select a Time Frame"/>	<b>Expire Date</b> <input type="text" value="MM/DD/YYYY"/>	
<b>File Attachment</b> <small>NOTE: You can attach up to three documents</small> <input type="text" value="Choose File"/> <input type="button" value="Browse"/>		<input type="checkbox"/> Alert User <input type="checkbox"/> Alert HR	

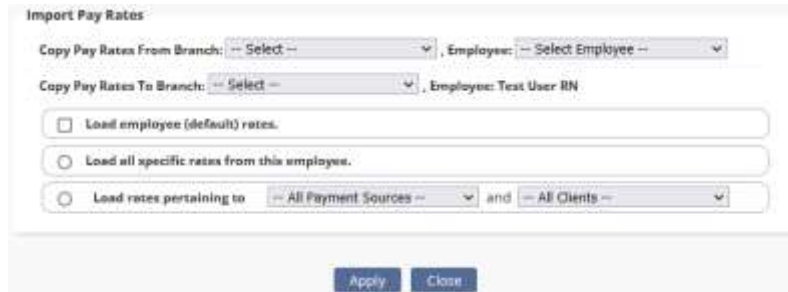
**Pay Rates** - See *Admin/Company Setup/Payroll/Pay Rates* for the functionality of sorting, viewing and updating rates. Select the **Copy Existing Rates** button to duplicate rates from another user.

Branch: Dallas    Payment Source: -- Default --    Client: -- Default --

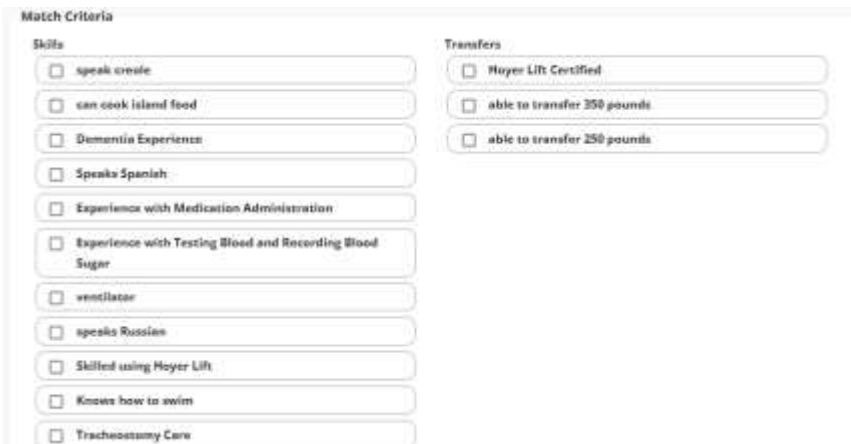
Default Rate     Specific Rate    ! A rate will override this in the future  
! Future rate has been applied

Task	Sun	Mon	Tue	Wed	Thu	Fri	Sat
PT Discharge							
12-Hour Tasks							
24 hour visit note							
30 Day Summary/Case Notes							
60 Day							
60 Day							
60 Day Summary							
789							
AA - Compliance training							
AA - mileage between two clients							
AA- Assessment							

Choose an employee from the copy pay rates from the drop-down menu. Check the box to load employee (default) rates or select the bullets to load specific rates and/or load rates about specific payment sources or clients. Select **Apply** when complete.



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



**Availability** - Enter the user’s availability to work in the following grid. Select squares in the grid using the plus icon. After selecting, the square will turn green. Choose an employee from the “Load another employee’s availabilities” drop-down menu and select **Load** to copy availability from another user. Select the **All** button to select every square in the grid or select **Clear** to remove all green squares.

### Employee Availabilities

Available

Load another employee's availabilities.

-- Select Employee --

		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>Shift 3</b> 11 PM - 7 AM	12 AM (Midnight)							
	1 AM							
	2 AM							
	3 AM							
	4 AM							
	5 AM							
	6 AM							
<b>Shift 1</b> 7 AM - 3 PM	7 AM							
	8 AM							
	9 AM							
	10 AM							
	11 AM							
	12 PM							

**Immunization** - User immunizations are tracked in this section. Immunization lists can be exported to an Excel spreadsheet by selecting the **Export to Excel** button in the top right. To add an immunization, select the **Add Immunization** button in the top left.

ACTIVE IMMUNIZATIONS						
Immunization	Administered?	Date Administered / Documented	Administered By	Lot #	Reason	Action
Influenza	Yes	12/22/2021	Clinic			<a href="#">Delete</a>   <a href="#">Deactivate</a>

INACTIVE IMMUNIZATIONS						
Immunization	Administered?	Date Administered / Documented	Administered By	Lot #	Reason	Action
COVID-19, Single Dose	Declined	12/23/2021				<a href="#">Delete</a>   <a href="#">Reactivate</a>

A new window will open in which organizations must choose the type of immunization and who it was administered by from their corresponding drop-down menus. Then select the administration date by writing or selecting the date in the calendar. Users can select **Save & Close**, or if there is more than one immunization to add, select **Save & Add Another** to continue with another blank "Immunization Log Information" window.



It will then show up under the Active Immunizations section. If a user declines an immunization, it can also be added by selecting the **Decline/Contraindicate Immunization** button at the top of the page. It will open another log information window where the type of immunization must be chosen again. Either write in or select the date from the calendar. Select whether comorbid condition is present. Then, mark whether the immunization was declined or contraindication. Users can select **Save**, or if there is more than one declined immunization to add, select **Save & Add Another** to continue with another blank “Immunization Log Information” window.



There is also an option to **Delete** or **Inactivate** an immunization by selecting the hyperlinks in the far right under Action. Once an immunization is not active, it falls under the Inactive Immunizations section, where it then can also be Deleted or Reactivated.

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

Select the **Exit** button at the bottom to leave the New User window. Select **Yes** to add another worker or select **No** to move on.

## EDITING A USER

*Admin/Lists/Users*

A window will open that will show a list of all current users. To filter for users, choose the status from the drop-down menu and start typing any user information in the search bar. A new user can also be added from here, selecting the **New User** button in the top right.

Organizations can export the list of all users to an Excel spreadsheet by selecting the **Excel Export** button in the top right. The organization can **Delete** users by selecting the hyperlink to the far right under the Action column. To edit a user, select the **Edit** hyperlink under the action column. The total number of active users will show at the bottom of the window.



Name	Title	Email	Phone	Mobile	Employment Type	Sex	Action
Aayush Kumar RN	Alternate Administrator	akumar@axxess.com	+1 939-327-28	(858) 603-3869	Employee	Male	Edit   Delete
Abby St Thomas HHA	Home Care Aide	Abby.St.Thomas@aol.com		(407) 591-0365	Employee	Female	Edit   Delete
Abdul Baute RN	Alternate Administrator	abaute@axxess.com		(123) 455-2333		Male	Edit   Delete

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

**Emergency Contacts** - Where user emergency contacts are managed. To add a contact, select the **Add Contact** button in the top right. In the New Contact window, enter the emergency contact's information. To make the contact the employee's primary emergency contact, check the box next to Mark as Primary. Only one emergency contact can be marked as the primary contact.

### New Contact

<b>First Name *</b>	<b>M.I.</b>	<b>Last Name *</b>	<b>Relationship *</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	Select Relationship
<b>Primary Phone *</b>		<b>Email</b>	
Home	<input type="text" value="1"/>	<input type="text" value="Enter Phone Number"/>	<input type="text"/>
<a href="#">Add Alternate Number</a>			
<b>Country *</b>	<b>Address Line 1 *</b>		
United States	Street and number, P.O. box, c/o		
<b>Address Line 2</b>	<b>City/Town *</b>		
Apartment, suite, unit, building, floor, etc.	<input type="text"/>		
<b>State *</b>	<b>Postal Code *</b>		
- Select State -	<input type="text"/>	<input type="text"/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

In the Actions column, users can edit, delete and mark emergency contacts as primary.

### Emergency Contacts

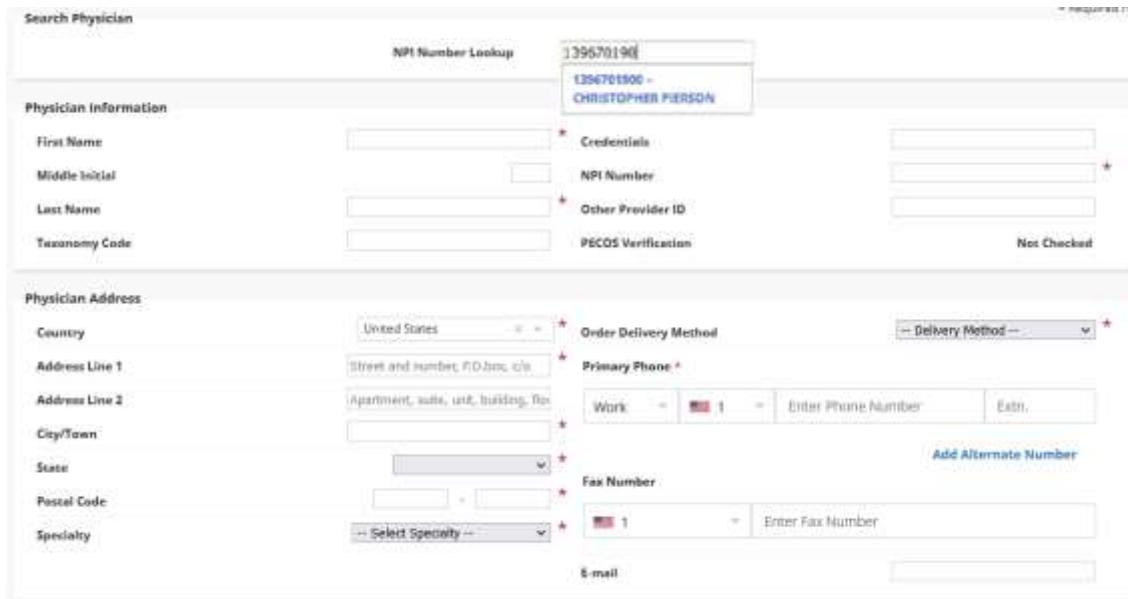
First Name	Last Name	Primary Phone	Relationship to Employee	Email Address	Actions
Ivy	Pierson	(214) 704-0935	Spouse		<a href="#">Mark as Primary</a> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

## ADDING A PHYSICIAN

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

A new window will open. The quickest way to enter a physician is to begin entering their NPI number. As the number is typed, physicians and their corresponding NPI numbers will appear below for selection. After selecting the physician and selecting the tab key, the Physician Information and Address will auto-fill based on the information that is in the NPI registry. This can still be edited. Everything with a red asterisk is required.





**NOTE:** If the NPI number is unknown, use the following website:  
[NPPES NPI Registry \(hhs.gov\)](http://nppes.hhs.gov)

Notice if the physician is already listed in the NPI registry, then the system will automatically do a PECOS Verification. A green check mark indicates they are PECOS verified; a red "X" indicates they are not.

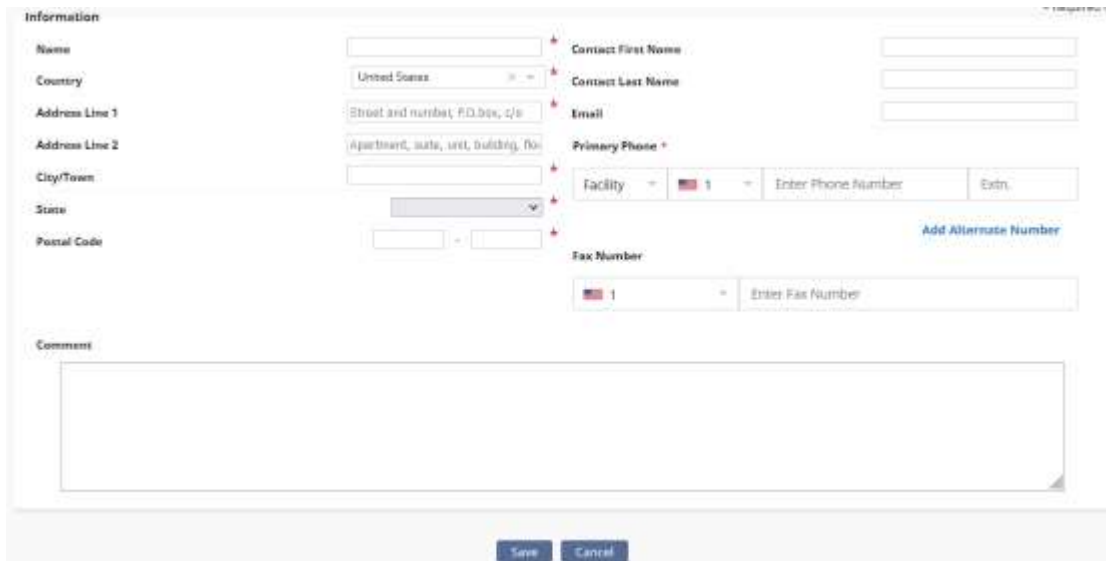
Select the **Add License** button to add any licenses tied to the physician. Enter the license number, choose the state, enter the issue and expiration date with the option to add attachments (only after a physician is saved). Select **Save** once complete.



## ADDING A NEW FACILITY

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

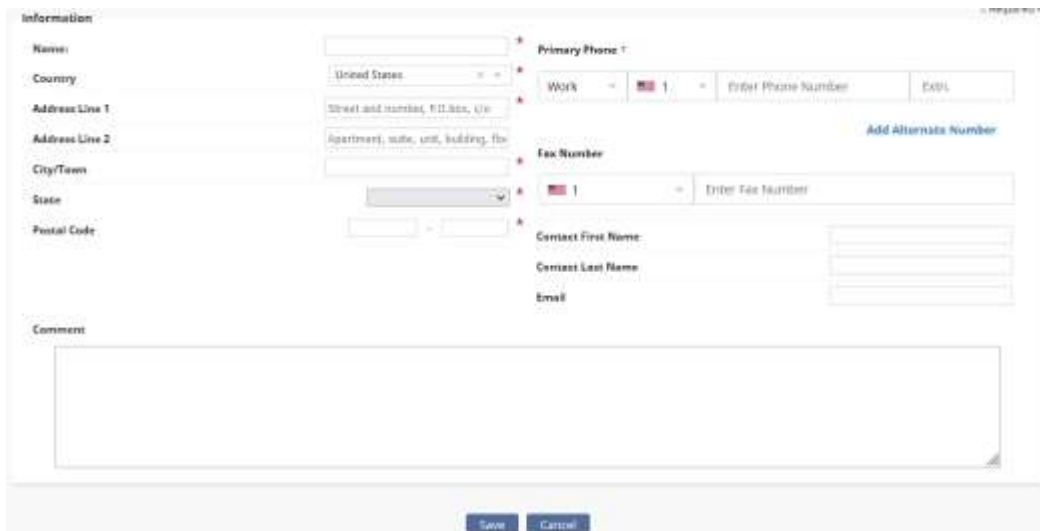
A new window will open. Enter the name, address and primary phone. When finished, select the **Save** button at the bottom.



## ADDING A NEW PHARMACY

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

A new window will open. Enter the name, address and primary phone. When finished, select the **Save** button at the bottom.



## OASIS TRANSMISSION

View/OASIS Management/OASIS Ready for Export

A new window will open. Filter for OASIS by choosing the branch (if more than one) from the drop-down menu. Then select **Refresh**. The client OASIS visits that meet the criteria will appear below.



There are checkboxes to the left of every client name listed. Select one or multiple then choose one of the buttons down below. If **Generate OASIS File** is chosen, the system will download the raw OASIS file on the computer to be uploaded to the Center for Medicare and Medicaid Services (CMS).

**NOTE: Create a folder on the computer where OASIS files can be stored for easy access.**

Once OASIS file(s) have been sent to CMS and accepted per the Final Validation report, go back inside the window, check the OASIS boxes that were submitted again (far left) and select the **Mark Selected as Exported** button at the bottom. A new window will open confirming that the OASIS file(s) have been accepted by CMS. To confirm, select **Yes**.

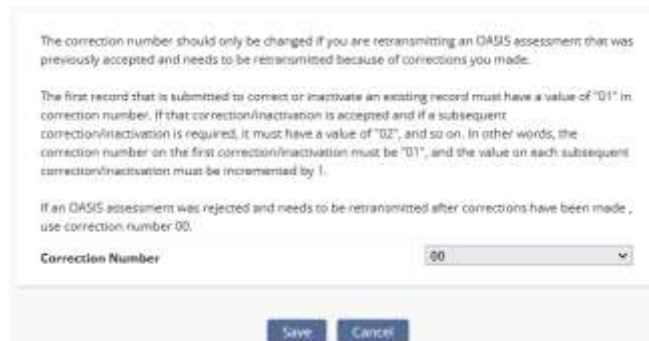


Similarly, if an OASIS needs to be marked as completed, but was not exported, check the box next to the client's name and select the **Mark Selected as**

**Completed (Not Exported)** button at the bottom of the page. A confirmation window will open, select the **Yes** button.




The OASIS list can be exported to an Excel spreadsheet by selecting the **Excel Export** in the top right of the window. If submissions have been rejected and a corrected OASIS is being resubmitted, users can change the correction number by selecting the **Edit** hyperlink on the far right of each OASIS line. A new window will open, and a warning will appear. Change the correction number by selecting from the drop-down menu and then selecting the **Save** button.



## **ORDERS MANAGEMENT**

### *View/Orders Management*

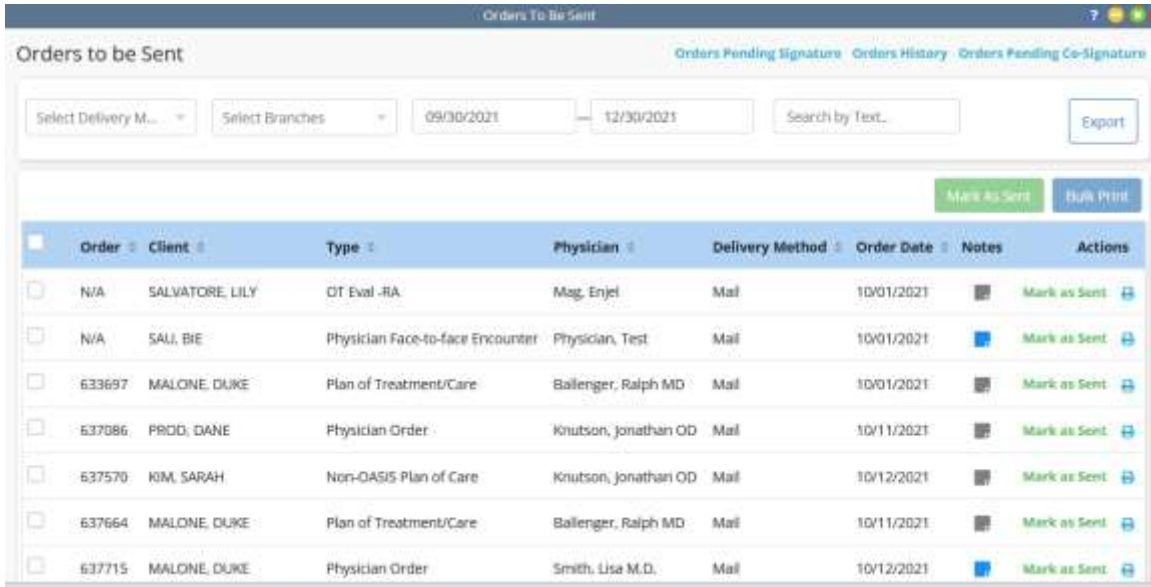
Orders Management is split into four sections. Navigate between the sections by selecting the desired section in the top right of each window.

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


To enter a new note, select **Add Note**. To update a note, click on the edit  icon. To remove a note, select the **Resolve** hyperlink.

**Orders To Be Sent** - This window houses orders that are ready to be sent to the physician for signature. Filtering for orders begins with the delivery method and the branch (if more than one) from the drop-down menu. Choose the date

range of the orders planning to be sent. Start typing any order (number), client, type or physician name in the free text space.

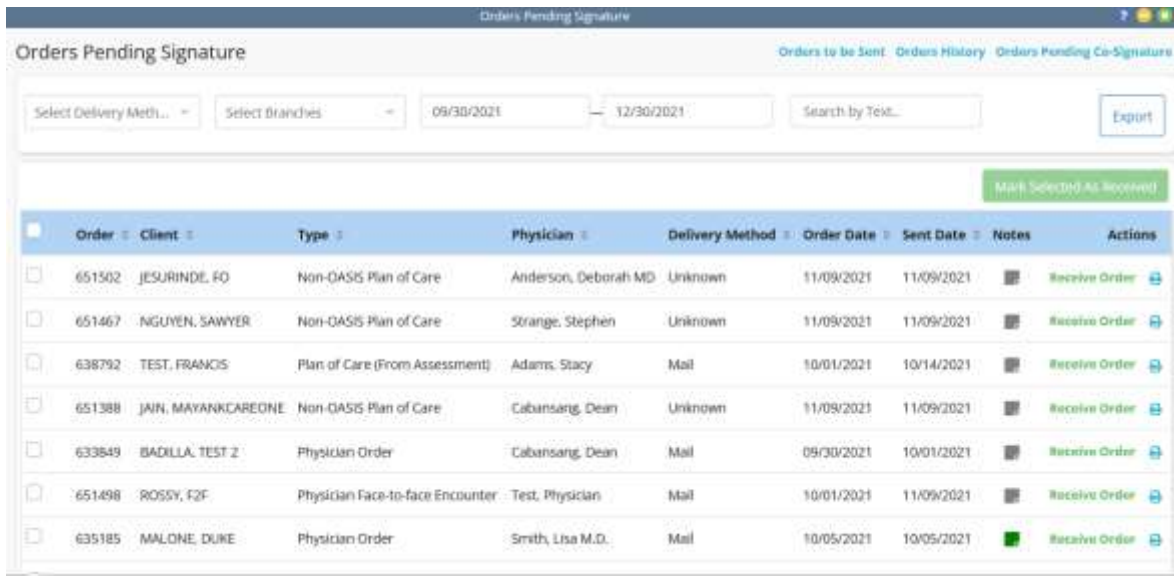


Order	Client	Type	Physician	Delivery Method	Order Date	Notes	Actions
<input type="checkbox"/>	N/A	SALVATORE, LILY	OT Eval -RA	Mag, Enjel	Mail	10/01/2021	<a href="#">Mark as Sent</a>
<input type="checkbox"/>	N/A	SALI, BIE	Physician Face-to-face Encounter	Physician, Test	Mail	10/01/2021	<a href="#">Mark as Sent</a>
<input type="checkbox"/>	633697	MALONE, DUKE	Plan of Treatment/Care	Ballenger, Ralph MD	Mail	10/01/2021	<a href="#">Mark as Sent</a>
<input type="checkbox"/>	637086	PRODD, DANE	Physician Order	Knutson, Jonathan OD	Mail	10/11/2021	<a href="#">Mark as Sent</a>
<input type="checkbox"/>	637570	KIM, SARAH	Non-OASIS Plan of Care	Knutson, Jonathan OD	Mail	10/12/2021	<a href="#">Mark as Sent</a>
<input type="checkbox"/>	637664	MALONE, DUKE	Plan of Treatment/Care	Ballenger, Ralph MD	Mail	10/11/2021	<a href="#">Mark as Sent</a>
<input type="checkbox"/>	637715	MALONE, DUKE	Physician Order	Smith, Lisa M.D.	Mail	10/12/2021	<a href="#">Mark as Sent</a>

To print an order, select the printer icon  on the far right of the order. Once printed, check the boxes to the left of the order and select the green **Mark As Sent** button for multiple orders. Select the green **Mark as Sent** hyperlink for individual orders. They will then be marked as sent to the physician, and a green disappearing notification will confirm.


Select more than one checkbox and then select the **Bulk Print** button to print more than one order at once. To export the list of orders that meet the search parameters, select the **Export** button in the top right.

**Orders Pending Signature** - This window houses orders that need to be marked as signed by the physician. Filtering for orders begins with the delivery method and the branch (if more than one) from the drop-down menu. Choose the date range of the orders planning to be signed. Start typing any order (number), client, type or physician name in the free text space.



Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Notes	Actions
<input type="checkbox"/>	651502	JESURINDE, FO	Non-OASIS Plan of Care	Anderson, Deborah MD	Unknown	11/09/2021	11/09/2021	<a href="#">Receive Order</a>
<input type="checkbox"/>	651467	NGUYEN, SAWYER	Non-OASIS Plan of Care	Strange, Stephen	Unknown	11/09/2021	11/09/2021	<a href="#">Receive Order</a>
<input type="checkbox"/>	638792	TEST, FRANCIS	Plan of Care (From Assessment)	Adams, Stacy	Mail	10/01/2021	10/14/2021	<a href="#">Receive Order</a>
<input type="checkbox"/>	651388	JAIN, MAYANKAREONE	Non-OASIS Plan of Care	Cabansang, Dean	Unknown	11/09/2021	11/09/2021	<a href="#">Receive Order</a>
<input type="checkbox"/>	633849	BADILLA, TEST Z	Physician Order	Cabansang, Dean	Mail	09/30/2021	10/01/2021	<a href="#">Receive Order</a>
<input type="checkbox"/>	651498	ROSSY, F2F	Physician Face-to-face Encounter	Test, Physician	Mail	10/01/2021	11/09/2021	<a href="#">Receive Order</a>
<input type="checkbox"/>	635185	MALONE, DUKE	Physician Order	Smith, Lisa M.D.	Mail	10/05/2021	10/05/2021	<a href="#">Receive Order</a>

To mark a single order as signed, select the green **Receiver Order** hyperlink to the right of the printer icon. Multiple orders can be marked as signed by checking the boxes to the left of the order then select the **Mark Selected as Received** button.



Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Notes	Actions
<input checked="" type="checkbox"/>	651502	JESURINDE, FO	Non-OASIS Plan of Care	Anderson, Deborah MD	Unknown	11/09/2021	11/09/2021	<a href="#">Receive Order</a>
<input checked="" type="checkbox"/>	651467	NGUYEN, SAWYER	Non-OASIS Plan of Care	Strange, Stephen	Unknown	11/09/2021	11/09/2021	<a href="#">Receive Order</a>
<input type="checkbox"/>	638792	TEST, FRANCIS	Plan of Care (From Assessment)	Adams, Stacy	Mail	10/01/2021	10/14/2021	<a href="#">Receive Order</a>

A new window will open to confirm or enter the received and physician signature date, then select the **Mark** button. The date auto-populates with today's date. Once marked as signed, they will disappear from the Orders Pending Signature window and be in the Orders History section.



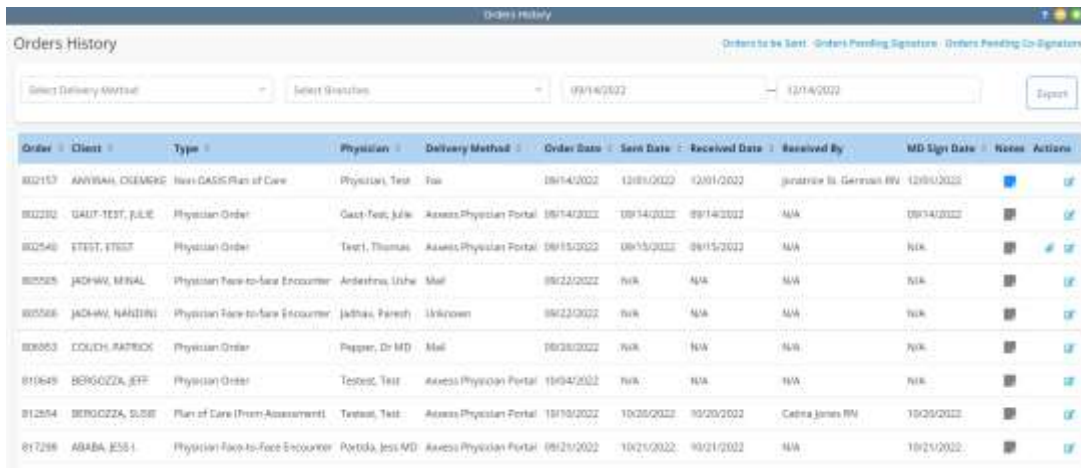
Received Date \*      Physician Signature Date \*

12/30/2021      12/30/2021

[Mark](#)   [Cancel](#)

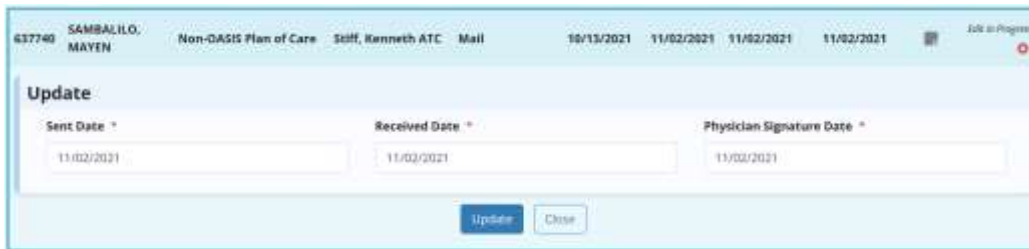


**Orders History** - This is where all orders in every status are housed. Filtering for orders begins with the branch (if more than one) from the drop-down menu and choosing the date range. The results can be sorted by selecting the column heading: Order, Client, Type, Physician, Delivery Method, Order Date, Sent Date, Received Date and MD Sign Date.



Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	Received By	MD Sign Date	Notes	Actions
802157	ANWYAH, OSEMKE	New OASIS Plan of Care	Physician, Test	Fax	08/14/2022	12/01/2022	12/01/2022	Janetree St. Germain RN	12/01/2022		[Edit] [Delete]
802292	GAUT-TEST, JULIE	Physician Order	Gaut-Test, Julie	Access Physician Portal	08/14/2022	08/14/2022	08/14/2022	N/A	08/14/2022		[Edit] [Delete]
802540	TEST, THOMAS	Physician Order	Test, Thomas	Access Physician Portal	08/15/2022	08/15/2022	08/15/2022	N/A	N/A		[Edit] [Delete]
802525	JACHAN, MURAL	Physician Face-to-face Encounter	Andersho, Ulha	Mail	08/22/2022	N/A	N/A	N/A	N/A		[Edit] [Delete]
802526	JACHAN, MURAL	Physician Face-to-face Encounter	Jachan, Paresch	Unknown	08/23/2022	N/A	N/A	N/A	N/A		[Edit] [Delete]
806853	COLECH, PATRICK	Physician Order	Pepper, Dr MD	Mail	08/28/2022	N/A	N/A	N/A	N/A		[Edit] [Delete]
810649	BERGOZZA, JEFF	Physician Order	Testot, Test	Access Physician Portal	10/04/2022	N/A	N/A	N/A	N/A		[Edit] [Delete]
812854	BERGOZZA, SUDE	Plan of Care (From Assessment)	Testot, Test	Access Physician Portal	10/10/2022	10/20/2022	10/20/2022	Cedra James RN	10/20/2022		[Edit] [Delete]
817298	ABABA, JESS I	Physician Face-to-Face Encounter	Portida, Jess MD	Access Physician Portal	08/21/2022	10/21/2022	10/21/2022	N/A	10/21/2022		[Edit] [Delete]

Select the edit icon to make updates. The line will expand, type in the date or select the calendar icon to adjust the order's sent, received and/or physician signature date. Select **Update** to save.



637740 SAMBALILO, MAYEN Non-OASIS Plan of Care Staff, Kenneth ATC Mail 10/13/2021 11/02/2021 11/02/2021 11/02/2021 [Edit] [Delete]

**Update**

Sent Date \* 11/02/2021 Received Date \* 11/02/2021 Physician Signature Date \* 11/02/2021

[Update] [Close]

Select the **Export** button in the top right to create an Excel spreadsheet of all orders in the window (based off search parameters).

**Orders Pending Co-Signature** - This is where orders are housed that need a co-signature because the user who signed the order requires a co-signature (per their permissions). To find a specific order, choose the branch (if more than one) from the drop-down menu, then select a date range. Start typing an order, date, client, MRN, type, physician, clinician and/or sign date in the free text space to narrow down the order list even further.

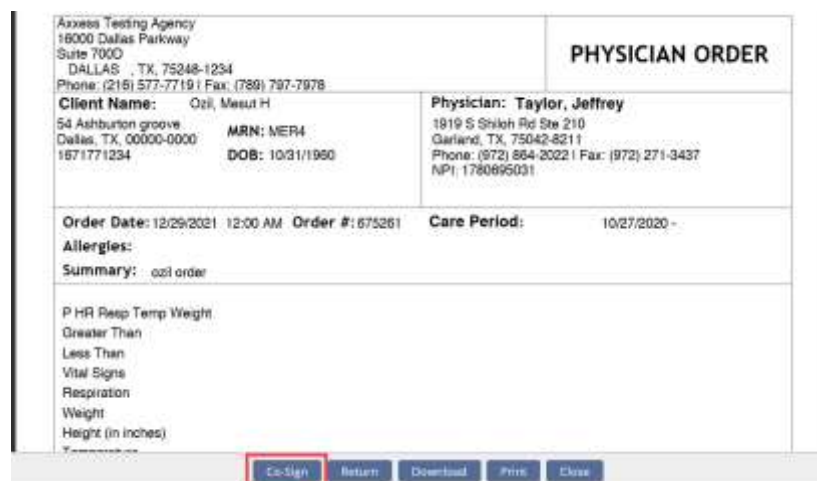
The list of orders can also be exported to an Excel spreadsheet by selecting **Excel Export** spreadsheet button in the top right of the window.



Order	Order Date	Client	MRN	Type	Physician	Clinician	Sign Date
677783	01/04/2022	SALVATORE, IAN	ALMPROD_002	Kim's Physician Order	Mag, Angel	Angel Magdugo RN	01/04/2022
678565	12/31/2021	SALVATORE, CANDICE	ALM111	Physician Order	Mag, Gel	Angel Magdugo RN	01/01/2022
675261	12/29/2021	OZIL, MESUT H.	MER4	Physician Order	Taylor, Jeffrey DO	Abdulmumin Shehu RN	12/29/2021

Total: 3

Selecting the client name hyperlink will take the user to the client's chart. To co-sign an order, select the hyperlink under the column **Type**. A new window will open, showing the printed version of the order. There are five options/buttons of what to do with the order (depending on permissions). The **Return** button works identically to a QA clinician returning a task to the submitter. **Download** will download a PDF version of the order on the computer. Select **Co-Sign**.



Axxess Testing Agency  
16000 Dallas Parkway  
Suite 7000  
DALLAS, TX, 75248-1234  
Phone: (214) 573-7719 | Fax: (789) 797-7978

**PHYSICIAN ORDER**

**Client Name:** Ozil, Mesut H  
54 Ashburton grove  
Dallas, TX, 00000-0000  
1871771234

**MRN:** MER4  
**DOB:** 10/31/1960

**Physician:** Taylor, Jeffrey  
1819 S Shiloh Rd Ste 210  
Garland, TX, 75042-8211  
Phone: (972) 854-2022 | Fax: (972) 271-3437  
NPI: 1780695031

**Order Date:** 12/29/2021 12:00 AM **Order #:** 675261 **Care Period:** 10/27/2020 -

**Allergies:**  
**Summary:** ozil order

P HR Resp Temp Weight  
Greater Than  
Less Than  
Vital Signs  
Respiration  
Weight  
Height (in inches)

The co-signature window will open (shown below). After entering the co-signature, the user can either choose to **Co-Sign** the order or **Co-Sign And Approve**. After co-signing, the order will disappear from the Orders Pending RN Co-Signature window.





## ADDING A PAYMENT SOURCE

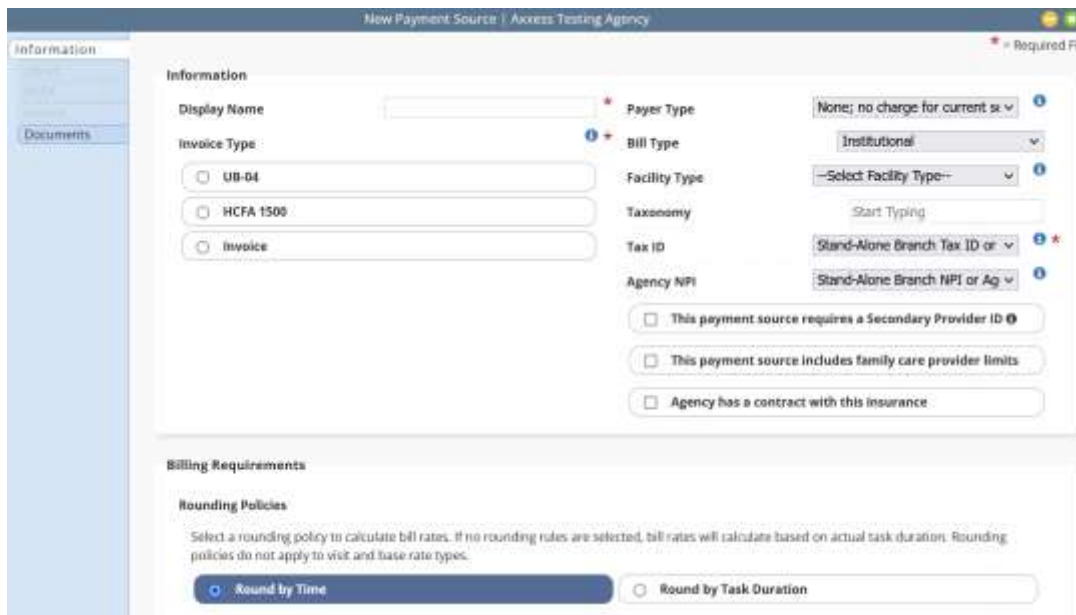
*Admin/New/Payment Source*


A new window will appear. The new payer window is split up into five tabs:

**Information** - Enter the display name and select the invoice type. Whichever type is chosen will dictate which tabs will be available on the left.

Choose the payer and bill type from the drop-down menus. Enter the Taxonomy, Tax ID and select the Agency NPI. Select whether the payment source requires a Secondary Provider ID, or the organization has a contact with the insurance.

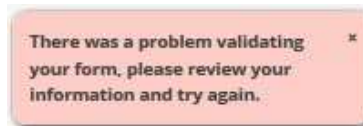
Decide on billing requirements including rounding policies and roll-up services. If UB-04 or HCFA 1500 were chosen, a clearinghouse will have to be chosen. Indicate if the payer will split overnight shifts into two billing lines. Then the organization must decide who is doing the billing (organization, Axxess or vendor). Then enter the payer information.



**NOTE:** The information  icon is a reference. Hover over the icon for more insight about that question or section.

Enter the person used to communicate at the payment source and then decide on how authorizations will be setup. Select **Save & Close** if the new payment source is complete or **Save** to continue to the next tab (depending on Invoice Type).

**NOTE:** If all required information is not entered, the following disappearing notification will appear:



The required sections that are missing information will be highlighted in red:



**UB-04** - Depending on how the insurance pays out, whether episodic or per visit, will determine if this tab is active. The payer being added in the screenshot below is for the UB-04. Fill out the locator sections 31a through 81CCd on the form and their corresponding dates.

**UB-04 Print Specification**  
 Check here if you want to print it on a pre-print form.

**UB-04 Locator Specification**

Locator 13 — Check here if the payor requires the admission hour

Locator 31a

Locator 31b

Locator 32a

Locator 32b

Locator 33a

Locator 33b

Locator 38—Charge Payor Name? (Print Only)

Locator 38a

Locator 38b

Locator 38c

Locator 38d

Locator 44 — Check here if the payor requires HIPPIS code

Locator 44a

Locator 44b

Locator 44c

Locator 44d

Locator 50a

Locator 50b

Locator 50c

Locator 50d

Locator 64a


Locator 64b

Locator 64c

Locator 64d

Locator 81CCa

Locator 81CCb

Below are the Additional Providers and Bill Rates sections. Select the **Add Provider** button to enter an additional provider. A line will appear in the Provider section, choose the qualifier, locator field and value source drop-down menus. If providers need to be removed, select the red  icon. Decide if mileage is billable. Then select the **Add Bill Rate** button.

**Additional Providers** ⓘ

[Add Provider](#) →

Qualifier	Locator Field ⓘ	Value Source ⓘ	Other ID Qualif. NPI	Other ID	Taxonomy Code	First Name	Last Name
-- Select Prio --	-- Select Loc --	-- Select Val --	-- Select OI --				

Check here to map service providers at line item level in ANS1 file.

Check here to create separate claims by rendering clinician.

**Billable Items**

**Billable Mileage/Kilometers** ⓘ

Yes  No

**Bill Rates**

[Add Bill Rate](#) →

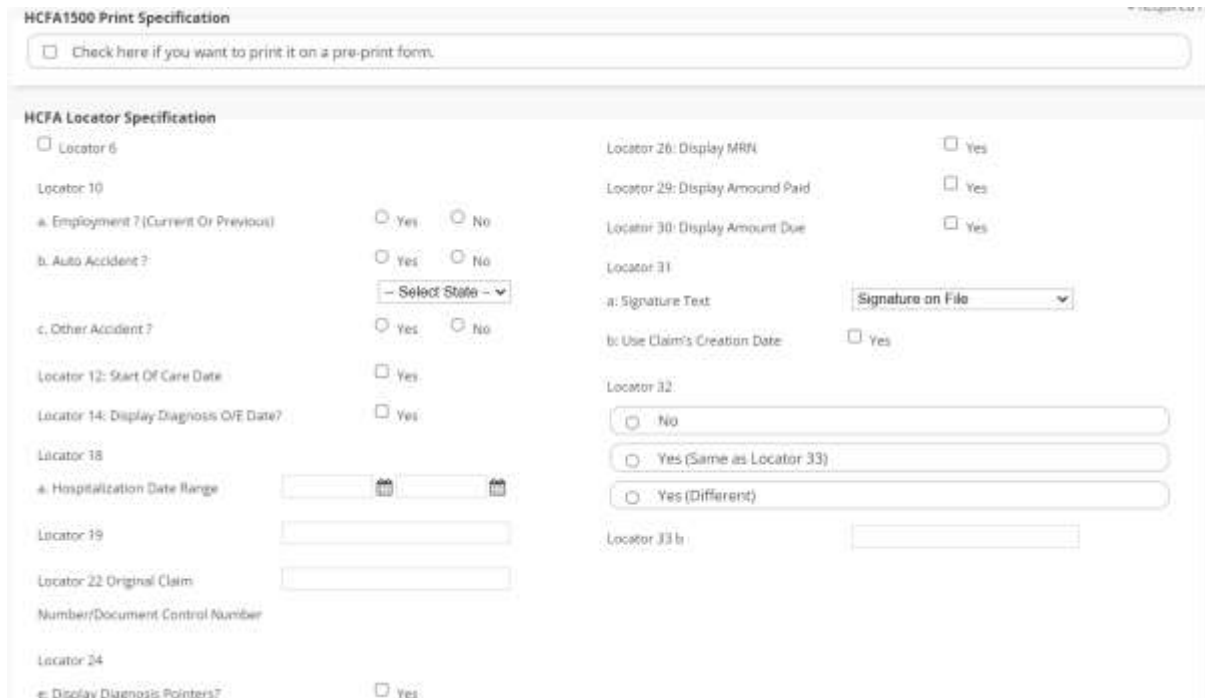
Task	Description	Rev. Code HCPCS	Rate	Unit Type	Modifiers	Time Limit	Action
------	-------------	-----------------	------	-----------	-----------	------------	--------


A new window will open. Fill out the Add Visit Information form and select **Save & Exit** or select **Save & Add Another** for additional entries.

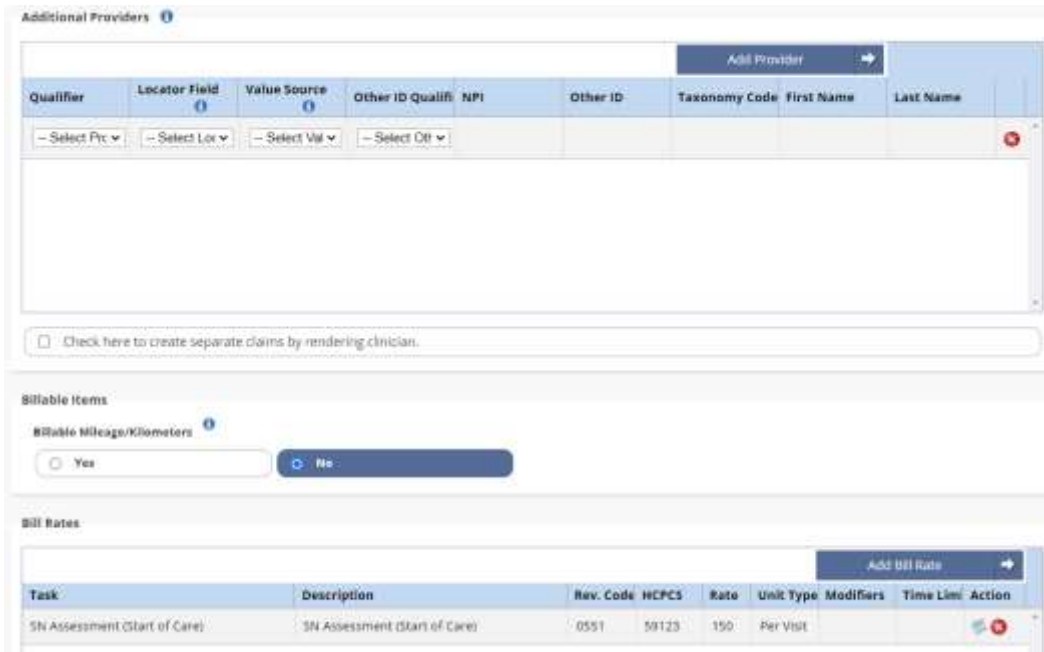


Select the **Previous** button to get back to the **Information** tab or select the **Save & Close** button at the bottom to complete the payment source.

**HCFA** - In this step, the organization will need to decide if they want HCFA 1500 printed on a pre-print form. After that, the HCFA Locators must be entered and chosen.



Below the locators are the additional providers and bill rates. Selecting the **Add Provider** button to enter an additional provider. A line will appear in the Additional Providers section, choose the qualifier, locator field and value source drop-down menus. If providers need to be removed, select the red  icon. Decide if mileage is billable. Then select the **Add Bill Rate** button.





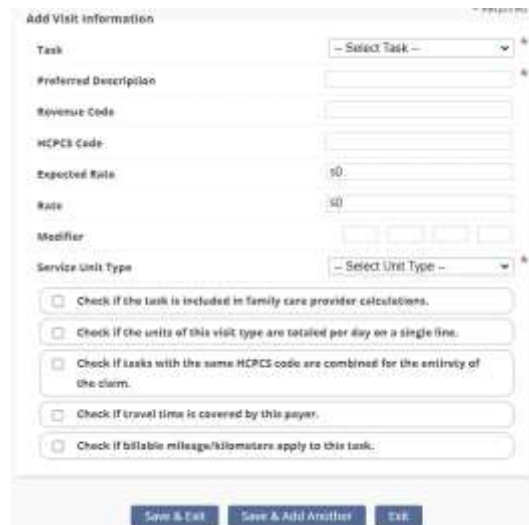
The screenshot shows two main sections: 'Additional Providers' and 'Bill Rates'.

**Additional Providers:** This section has a table with columns: Qualifier, Locator Field, Value Source, Other ID Qualifi, NPI, Other ID, Taxonomy Code, First Name, and Last Name. Below the table are four dropdown menus: '- Select Ptc', '- Select Loc', '- Select Val', and '- Select Oth'. There is an 'Add Provider' button with a right arrow and a red X icon in the top right corner. Below the table is a checkbox:  Check here to create separate claims by rendering clinician.

**Billable Items:** This section has a label 'Billable Mileage/Kilometers' and two radio buttons: 'Yes' and 'No'.

**Bill Rates:** This section has a table with columns: Task, Description, Rev. Code, HCPCS, Rate, Unit Type, Modifiers, Time Lim, and Action. There is an 'Add Bill Rate' button with a right arrow. The table contains one row: SN Assessment (Start of Care), SN Assessment (Start of Care), 0551, 59123, 150, Per Visit.

A new window will open. Fill out the Add Visit Information form and select **Save & Exit** or **Save & Add Another** for additional entries. To edit previously entered bill rates, select the edit  icon or if they need to be removed, select the red  icon.



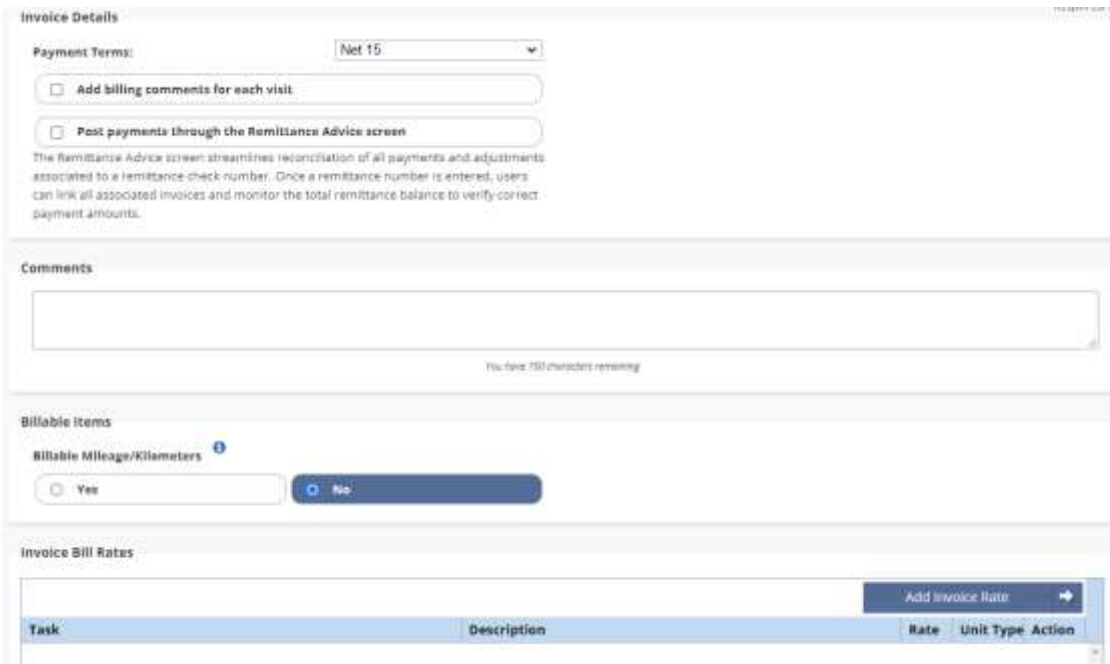
The 'Add Visit Information' form contains the following fields and options:

- Task:
- Preferred Description:
- Revenue Code:
- HCPCS Code:
- Expected Rate:
- Rate:
- Modifier:
- Service Unit Type:
- Check if the task is included in family care provider calculations.
- Check if the units of this visit type are totaled per day on a single line.
- Check if tasks with the same HCPCS code are combined for the entirety of the claim.
- Check if travel time is covered by this payer.
- Check if billable mileage/kilometers apply to this task.

At the bottom, there are three buttons: 'Save & Exit', 'Save & Add Another', and 'Exit'.



Select the **Previous** button to get back to the **Information** tab or tap on the **Save & Close** button at the bottom to complete the payment source.

**Invoice** - The last tab allows for organizations to set up payment sources that require an invoice. First, decide the Payment Terms. Select the checkbox(es) if the organization needs to add billing comments for each visit or post payments through the Remittance Advice screen. There is space for comments and decide if mileage is billable. Select **Add Invoice Rate** to add a new invoice rate.



The screenshot shows the 'Invoice Details' form with the following sections:

- Payment Terms:** A dropdown menu set to 'Net 15'.
- Checkboxes:**
  - Add billing comments for each visit.
  - Post payments through the Remittance Advice screen.
- Remittance Advice Note:** A text block explaining that the Remittance Advice screen streamlines reconciliation of all payments and adjustments associated to a remittance check number.
- Comments:** A large text area for entering comments, with a note 'You have 100 characters remaining'.
- Billable Items:** A section for 'Billable Mileage/Kilometers' with radio buttons for 'Yes' and 'No' (selected).
- Invoice Bill Rates:** A table with columns for Task, Description, Rate, Unit Type, and Action. An 'Add Invoice Rate' button is located at the top right of the table.

Choose the task and service unit type then enter the preferred description, rate, service units per visit and if mileage applies to the task. Select **Save & Exit** to finish or select **Save & Add Another** for additional entries. To edit previously entered invoice rates, select the edit  icon or if they need to be removed, select the red  icon.



The screenshot shows the 'New Visit Information' form with the following fields:

- Task:** A dropdown menu with the text '- Select Task -'.
- Preferred Description:** A text input field.
- Rate:** A text input field containing the value '50'.
- Service Unit Type:** A dropdown menu with the text '- Select Unit Type -'.
- Check if billable mileage/kilometers applies to this task:** A checkbox that is currently unchecked.

At the bottom of the form are three buttons: 'Save & Exit', 'Save & Add Another', and 'Close'.

## EDITING AN EXISTING PAYMENT SOURCE

*Admin/Lists/Payment Sources*

Select the **Edit** hyperlink to the far right of the screen under the Action column. To search for a payment source, start typing any part of the name, payer type, payer category, payer ID, invoice type, phone or contact person in the white free text space at the very top of the page.

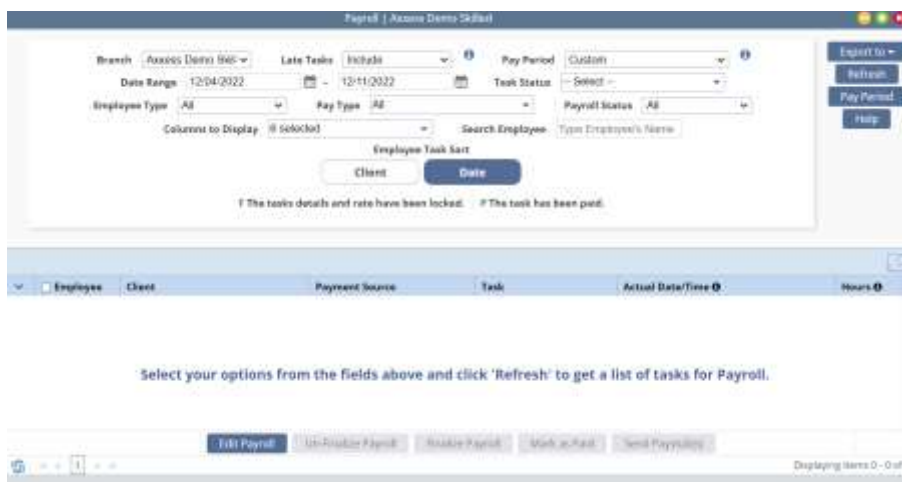


Name	Payer Type	Payer Category	Payer ID	Invoice Type	Phone	Contact Person	ENV Integration	Action
Private (Self) Pay	Self-pay	Self-pay		Invoice				Edit
AA Insurance - AJM	Self-pay	Self-pay	60054	HCFA 1500	(408) 505-5555			Edit
Aetna	Medicaid (HMO/managed care)	Medicaid	112343	HCFA 1500		CONTACT FIRST NAME CONTACT LAST NAME	Sandata	Edit
Aetna HCFA	Medicaid (HMO/managed care)	Medicaid	60054	HCFA 1500	(408) 464-7397		Sandata	Edit
Aetna Intrepid	Private/Commercial HMO/managed care	Commercial Insurance	60054	HCFA 1500	(507) 687-6876		Sandata	Edit
Aetna Intrepid	Private/Commercial HMO/managed care	Commercial Insurance	60054	HCFA 1500	(507) 687-6876		Sandata	Edit
Aetna-AP	Private/Commercial HMO/managed care	Commercial Insurance	555555	HCFA 1500				Edit
Aflac	Self-pay	Self-pay		Invoice				Edit

## PAYROLL

*Employees/Payroll*

The following window will open with only search criteria at the top. Select the branch from the drop-down menu (if there is more than one). Select the Late Tasks, Pay Period, Task Status, Employee Type, Pay Type and Payroll Status.



Branch: Axxess Demo S&B | Late Tasks: Include | Pay Period: Custom | Date Range: 12/04/2022 - 12/11/2022 | Task Status: -- Select -- | Employee Type: All | Pay Type: All | Payroll Status: All

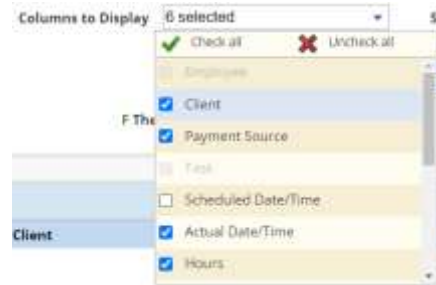
Columns to Display: [Selected] | Search Employee: [Type Employee's Name]


Employee Task Start: Client | Date

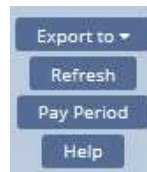
Select your options from the fields above and click 'Refresh' to get a list of tasks for Payroll.

Buttons: Edit Payroll, Un-Freeze Payroll, Freeze Payroll, Mark as Paid, Send Payroll

Select which columns to display by checking the corresponding boxes. Selecting the green check mark will select all statuses and selecting the red X will uncheck all choices. Search for employees by name and then decide whether to sort employee tasks by client or date. Then select the **Refresh** button to see the results.



To minimize the search window to see more employees, select the collapse  icon. Employees will be grouped by their name with a check box next to them. Selecting the > icon to the left of their name will expand their list of payable items. They are organized in the following columns: Client, payment source, task, actual date/time and hours. For the top-right menu items, export the payroll list by selecting the **Export to** button and select Excel. Select the **Pay Period** button to create a new pay period.



The dates auto-generate to after the newest created pay period. Select the **Create** button.



Select the **Help** button to get more insight on how to setup payroll.



Payroll Help

### Payroll Help

- Initial Payroll SetUp
- Payroll Parameters
- Processing Payroll
- Send PayStubs
- Edit Payroll

## Initial Payroll SetUp

The first step in using the payroll module is to complete the payroll tab in Admin-Manage Company Information. Once the Payroll Tab has been completed Pay Periods can be created in the payroll module.

## Payroll Parameters

### Branch

Select the location you are processing payroll for.

### Late Tasks

Are defined as, unpaid tasks whose service date is prior to the start of the selected pay period. This parameter provides the ability to include/exclude/show only tasks that fall within this category. If selected to include, late tasks are highlighted in yellow to assist in the identification.

### Pay Period

This contains a drop down list of the agency created pay periods. To create a pay period select Pay Period

Select the **Refresh** button to see the search results below based on the parameters.

Employee	Client	Payment Source	Task	Actual Date/Time	Hours
Badilla, Charlene RN					
Baute, Abdul RN					
<input checked="" type="checkbox"/>	AKHTAR, PALISHA	Invoice CE	Skilled nurse visit	11/21/2021 12:00 AM - 01:00 AM	1.00
<input checked="" type="checkbox"/>	AKHTAR, PALISHA	Invoice CE	Skilled nurse visit	11/22/2021 12:00 AM - 01:00 AM	1.00
					2.00
					Hours
Bhardwaj, Pranav RN					
BHADWAI, DIPTI					
Total: 2 of 88 Checked					
<input type="button" value="Edit Payroll"/> <input type="button" value="Un-Finalize Payroll"/> <input type="button" value="Finalize Payroll"/> <input type="button" value="Mark as Paid"/> <input type="button" value="Send Paystub(s)"/>					
					Displaying Employees 1 - 19 of 19

Select the **Employee** checkbox to check all employee boxes and again to deselect all. After selecting all employees in a previous pay period, the blue buttons at the bottom become active. To make payroll edits, select the box(es) next to the client name and select the **Edit Payroll** button.

<input checked="" type="checkbox"/>	AKHTAR, PALISHA	Invoice CE
<input checked="" type="checkbox"/>	AKHTAR, PALISHA	Invoice CE
		2.00
		Hours
88 Checked		<input type="button" value="Edit Payroll"/> <input type="button" value="Un-Finalize Payroll"/>

The actual date/time becomes editable. Enter to select different days and times for tasks. When done editing, select the **Save** button.



The screenshot shows a task entry form with two rows of data. The first row is highlighted in light blue and contains the text 'Invoice CE', 'Skilled nurse visit', a date '11/22/2021', a time '12:00 AM', and a duration '1.00'. The second row is highlighted in light orange and contains the text 'Invoice CE', 'Skilled nurse visit', a date '11/22/2021', a time '01:00 AM', and a duration '2.00 Hours'. A red box labeled '1' highlights the date and time fields in the first row. A red box labeled '2' highlights the 'Save' button at the bottom of the form.

Select an employee and then the **Finalize Payroll** button.



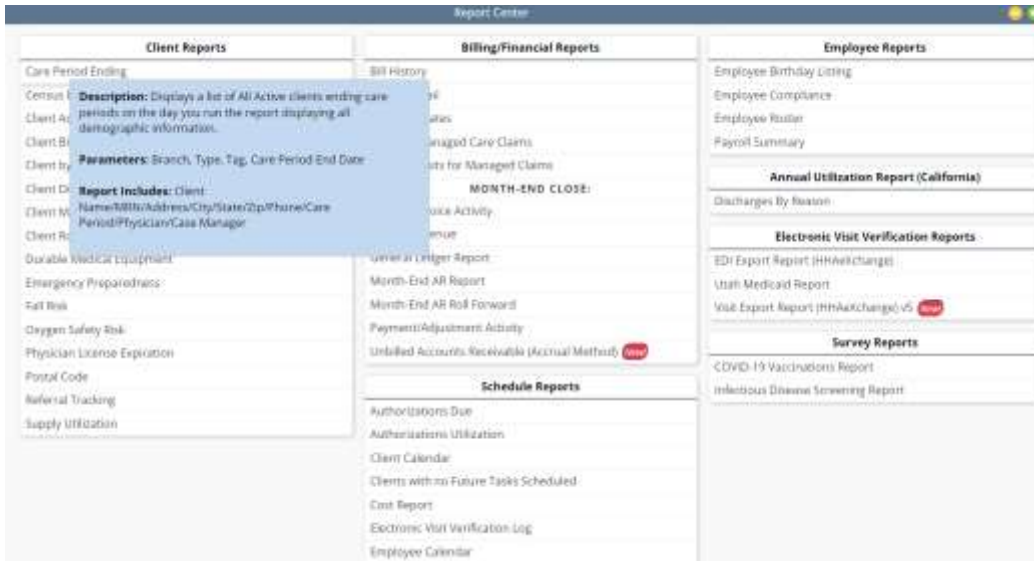
The screenshot shows a list of employees with checkboxes. The first employee, 'Aute, Abdul RN', has a checked checkbox. Below the list, there are three buttons: 'Edit Payroll', 'Un-Finalize Payroll', and 'Finalize Payroll'. The 'Finalize Payroll' button is highlighted with a red box.

The task updates with a green **F** next to the checkbox meaning the task details and rate have been locked. If an employee was marked as finalized but should not have been, select the box next to their name and then select the **Un-Finalize Payroll** button, and the green **F** will be removed. If you select the same employee checkbox and then select the **Mark as Paid** button, the task then updates with a green **P** next to the checkbox meaning the task has been paid.

## **REPORT CENTER**

### *Reports/Report Center*

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



Most of the reports function the same way. In the example report below, Client Roster, parameters must be chosen, then select the **Generate** button to the right to display the results below.

Selecting the **Excel Export** will put the information into an Excel spreadsheet. Selecting the **Reports Home** button will go back to the list of all reports.




Some reports do not generate instantaneously; they must be requested. To do this, select the parameters then select the **Request Report** button to the right of the parameters. The request then goes to a different window. It can be found in *Reports/Completed Reports*.

Here, users can retrieve a copy of the finished report and see who ran the report and when. Search through the completed reports by typing the name, format, status, requested by, started and completed date in the free text space at the top of the screen.

To view the report, select the hyperlink text listed under the **Name** column. To remove the report, select the **Delete** hyperlink to the far right under the Action column or to remove multiple, check the box(es) next to the report and then select the **Delete** button.



The refresh  icon is available in the bottom left of the window to get the latest update or select the **Refresh** button in the top right of the window.

## **ADDING TEMPLATES**

*Admin/New/Template*

The window below will appear. Create a name for the template. Then write the template inside the white free text section. The section is limited to 10,000 characters. Once completed, select the **Save** button.

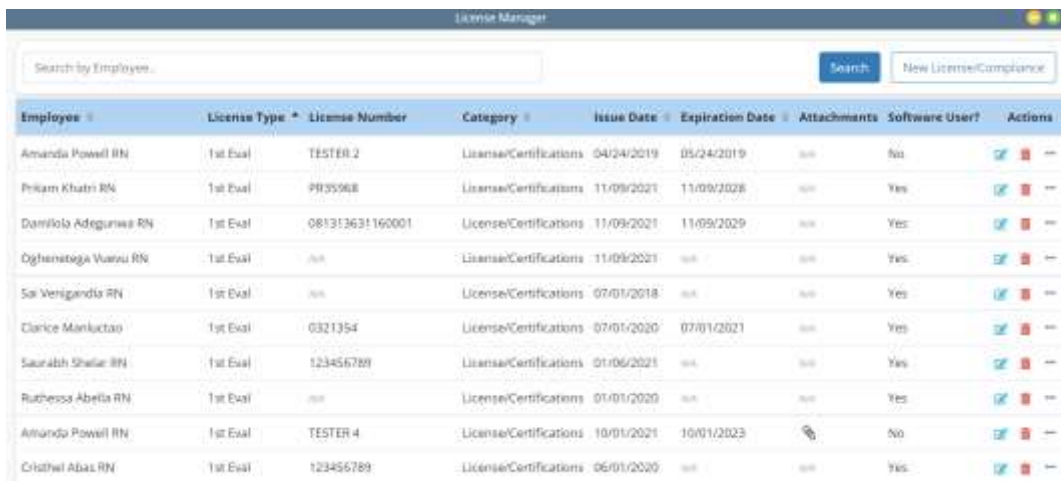

































**NOTE:** Templates can be used to save time for writing orders, goals, care plans, physician statements, narratives and other places inside visits

## LICENSE MANAGER

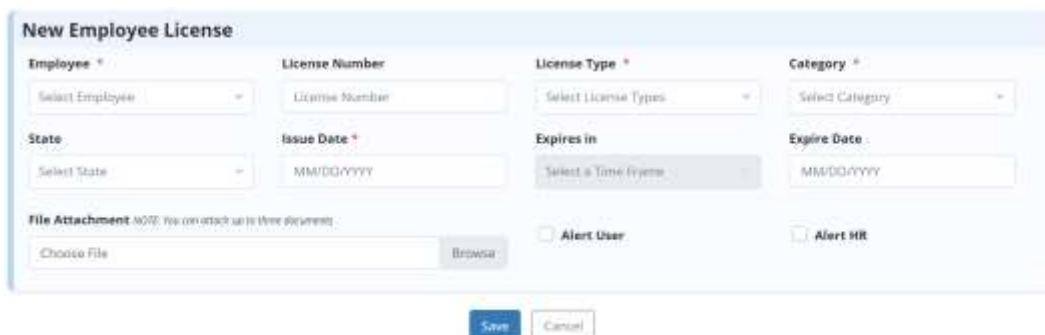
### Employees/License Manager

A window will open that will show all current user licenses. Start typing an employee, license type, number, category, issue date, expire and/or software user to narrow down the list. Results are shown over multiple pages and the number shown can be adjusted at the bottom of the page. Select the **New License/Compliance** button in the top right.



Employee	License Type	License Number	Category	Issue Date	Expiration Date	Attachments	Software User?	Actions
Amanda Powell RN	1st Eval	TESTER 2	License/Certifications	04/24/2019	05/24/2019	...	No	  
Priyam Khatri RN	1st Eval	PR35968	License/Certifications	11/09/2021	11/09/2028	...	Yes	  
Damilola Adegunwa RN	1st Eval	081313631160001	License/Certifications	11/09/2021	11/09/2029	...	Yes	  
Oghenitaga Vuvu RN	1st Eval	...	License/Certifications	11/09/2021	...	...	Yes	  
Sai Venigandla RN	1st Eval	...	License/Certifications	07/01/2018	...	...	Yes	  
Clarice Mankutao	1st Eval	0321354	License/Certifications	07/01/2020	07/01/2021	...	Yes	  
Saunath Sheila RN	1st Eval	123456789	License/Certifications	01/06/2021	...	...	Yes	  
Ruthessa Abella RN	1st Eval	...	License/Certifications	01/01/2020	...	...	Yes	  
Alfonso Powell RN	1st Eval	TESTER 4	License/Certifications	10/01/2021	10/01/2023		No	  
Cristhel Abas RN	1st Eval	123456789	License/Certifications	06/01/2020	...	...	Yes	  

A New Employee License line expands. Choose the employee, license type, category and state from the drop-down menu. Enter the license number, issue and expire date. Add a file attachment by selecting the **Browse** button. If the organization would like the system to remind the user or HR about the expiring license, check the alert user and/or alert HR boxes and designate an alert date. Select the **Save** button when complete.





**New Employee License**

Employee:  License Number:  License Type:  Category:

State:  Issue Date:  Expires in:  Expire Date:

File Attachment:    Alert User  Alert HR

Select the edit  icon on the far right under the Action column to edit the information from the previous screenshot or the delete  icon to remove the employee license altogether.

## ADDING SUPPLIES

*Admin/New/Supply*

The New Supply window opens. Enter the description, HCPCS, revenue code and the unit cost. Then select the **Save** button.



The screenshot shows a 'New Supply' window with the following fields: Description (text input), HCPCS (text input), Revenue Code (text input), and Unit Cost (text input). There are 'Save' and 'Cancel' buttons at the bottom.

## ADDING ADJUSTMENT CODES

*Admin/New/Adjustment Code*

The New Adjustment Code window opens. Enter the code, description and choose from a negative or positive type. Then select the **Save** button.



The screenshot shows a 'New Adjustment Code' window with the following fields: Code (text input), Description (text input), and Type (dropdown menu with '-- Select Type --'). There are 'Save' and 'Exit' buttons at the bottom.

## ADDING DOCUMENT TYPES

*Admin/New/Document Type*

The New Document Type window opens. Enter the document name and choose from a client, employee, client and employee or payer category. Then select the **Save** button.

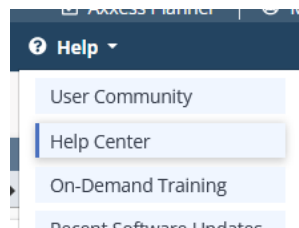


The screenshot shows a 'New Document Type' window with the following fields: Document Name (text input) and Category (dropdown menu with '-- Select --'). There are 'Save' and 'Cancel' buttons at the bottom.

## 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/>

