

Hospice Job Roles and Workflow Duties

Job Role	Description	Workflow	Features That Streamline Workflow
Intake Staff	Intake staff coordinate referrals, identify and verify payer sources and benefits, review prior hospice benefit periods used and current home health episodes, and obtain patient history and physicals for clinical eligibility review. They serve as liaisons among physicians, the hospice team, and patients; may schedule patient hospice information visits, preadmission evaluations and RN admission assessments; and track and report referral, admission and non-admission data.	<ul style="list-style-type: none"> Creates referrals, including: <ul style="list-style-type: none"> Obtains the patient's history and physical along with a copy of the referral order from the referring physician to evaluate the patient for admission to hospice Documents patient demographics Documents patient's legal representative or next of kin Documents patient location Documents clinical information included in the history and physical Documents advance directive status when copies of advance directives are provided Verifies and documents payer source Shares history and physical information with DCS/clinical manager for eligibility desk review Contacts patient/legal representative to discuss hospice referral, hospice services and referral to admission process. May schedule admission assessment appointment, coordinating the patient's preferred visit time with the DCS/clinical manager to ensure the RN is available to make the admission visit Follows up on referrals that have not been admitted Reports daily referrals, admissions, conversion rates and non-admits 	<ul style="list-style-type: none"> Inquiries allow for documentation of potential referrals Inquiries can be converted to referrals when a patient is referred for evaluation Patient HOPE demographic and payer data flows to patient admission documents Eligibility checks for Medicare benefits that identify prior and current benefit periods are performed instantly Document upload and referral notes support real-time collaboration between intake, clinical leadership and admission staff Preadmission evaluations can be scheduled directly from referrals Inquiries and referrals include narrative note sections that provide visibility into their statuses Admin Dashboard displays referrals, admissions and conversion rates by referral source

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Team Secretary	Under the direction of the DCS or clinical manager, team secretaries manage clinical documents, including physician orders, clinical notes and communications related to patient care, and collect and maintain IDG documentation within patients' medical records, including physician orders, certifications of terminal illness, recertification documentation, plans of care and visit notes. They ensure physician orders are sent for signature, tracked and returned promptly. Team secretaries also track census data, admissions, discharges and deaths, and may schedule visits or collaborate with the scheduler to ensure visits are scheduled and completed according to the patient's plan of care, preferences and staff availability.	<ul style="list-style-type: none"> Tracks orders from creation to Returned With Physician Signature status Prepares for IDG meetings, compiling visit notes, orders, certifications of terminal illness, face-to-face visits and patient level of care changes Tracks patient census Collaborates with scheduler to ensure team schedules update according to admissions, discharges and level of care changes 	<ul style="list-style-type: none"> Automated orders management Recertifications Due widget displays patients with past-due, at-risk and upcoming recertifications with detailed reporting Orders Dashboard displays detailed information about orders, including orders to be sent and orders out for signature IDG Prep Report displays documents needed for IDG and enables users to schedule visits, send messages and upload documents related to comprehensive assessment updates Patient census updates in real time and appears on the Patients Dashboard, Schedule Dashboard and Admin Dashboard

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DCS/Clinical Manager	Directors of clinical services (DCSs)/clinical managers are responsible for the hospice organization's day-to-day clinical operations.	<ul style="list-style-type: none"> Monitors and reports patient certification and recertification activity Monitors and participates in IDG activities and meetings Monitors all aspects of the organization's QAPI activities Monitors HOPE file exports to ensure they meet the required minimum HQRP threshold Monitors patient levels of care to ensure patients are appropriate for current level of care services received Monitors and adjusts staffing and productivity to optimize patient care and manage employee productivity while adhering to the visit frequencies included in the patient's comprehensive assessment 	<ul style="list-style-type: none"> Comprehensive assessments due and recertification data are displayed on the Patients and Admin Dashboards IDG Prep Report displays patients in Admission and Recertification statuses and provides full visibility into the status of required admission and recertification documents Visits can be scheduled, messages can be sent, and documents can be uploaded in the IDG Prep Report Progress Toward Goals and Interventions Performed This Visit narratives flow from notes to the patient's IDG Summary when Send Note to IDG Summary is selected Orders-driven processes promote compliance and streamline operations through orders automation, including updating the patient's comprehensive assessment and IDG Summary QA Center enables review of documentation Documents that require the attention of the IDG member completing the note are returned with documentation regarding the changes that need to be addressed Axxess BI provides customized dashboard and QA reports Axxess Hospice includes HQRP metrics HOPE files are automatically generated from admission assessments, HUVs, death visits and discharge visits Comprehensive and combined initial/comprehensive admission documents include a HOPE scrubber that identifies HOPE warnings, inconsistencies and errors that may be corrected prior to completing the note or in the HOPE Export Manager where labels identify the corrections that should be made prior to exporting the HOPE file Patients and Admin Dashboards provide full visibility into patient levels of care and indicate when a patient's level of care has changed Dashboard links provide access to the patient record for review of documentation supporting the patient's level of care Patient charts include a Level of Care History Report that displays changes to the patient's level of care in each benefit period Schedule Dashboard displays current, historical and future scheduled visits by day, discipline and status. Missed visits, visits not yet started, unassigned visits and visits pending QA appear on the Schedule Dashboard, enabling review and management Schedule Reports include the HUV and SFV Status Report, Visit Alerts Report, Frequency Watch Report, Scheduled Tasks Report, Missed Visits by User Report and Visit History by Date Range Report, all of which can be filtered and sorted for evaluation

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Quality Assurance Nurse	Quality assurance (QA) nurses are responsible for managing the overall quality of care provided by the hospice organization, including ongoing QA review of documentation, QAPI programming, infection control programming, incident/accident programming and other duties related to the provision of compliant quality of care.	<ul style="list-style-type: none"> • Monitors documentation to ensure compliance with discipline-specific licensing standards, as well as local, state and federal regulations • Identifies opportunities for improvement and develops performance improvement plans to improve the quality of care provided or administrative processes • Tracks, monitors and reports data related to infection control and incident reporting • Manages HOPE file transmission, including the collection of HOPE data from admission assessments, HUV assessments, death visit notes and discharge visit notes • Completes the HOPE data file for each patient admitted to and discharged from hospice 	<ul style="list-style-type: none"> • QA Center enables review of IDG documentation and can be sorted by patient status, branch, date range, review status, task and patient tags • Patient tags identify patients who are being evaluated as a part of a performance improvement plan • Patient Tags Report provides full visibility into the use of all organization-specific tags • Incident and infection reports can be generated within assessment and visit documents and can be scheduled as tasks, streamlining the reporting process • Incident reports are easily accessed in the QA Center, eliminating the need to search for them in the patient chart • Incident/Accident Report is automatically generated and used to monitor incidents and accidents and identify trends • Infectious disease screenings for patients are included in patient assessment and visit notes • Infectious disease screenings for employees are available for documentation and review in employee profiles • HOPE files are automatically generated from admission assessments, HUV assessments, death visits and discharge visits • Comprehensive and combined initial/comprehensive admission documents include a HOPE scrubber that identifies HOPE warnings, inconsistencies and errors that may be corrected prior to completing the note or in the HOPE Export Manager where labels identify the corrections that should be made prior to exporting the HOPE file

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Biller	Billers are responsible for the hospice organization's billing processes.	<ul style="list-style-type: none"> Tracks hospice admissions and the five-day NOE submission window Enters NOEs in DDE to ensure timely acceptance Creates, verifies and submits claims Enters and posts payments Monitors and evaluates claims for billing readiness Coordinates room and board billing with nursing facilities 	<ul style="list-style-type: none"> NOEs are automatically generated and available for verification when a patient is admitted Axxess is a Medicare Network Service Vendor, which enables our clients to submit NOEs and other claims directly, without the delay of using a clearinghouse Claims are automatically generated for months that the patient is in Active status and are automatically updated during the process of care Initial claims automatically generate on the date of admission Initial and continuing claims are automatically converted to final claims when the patient is discharged from hospice Electronic remittance advices are automatically entered and posted in Axxess Hospice Billing Dashboard displays claims ready for billing, including NOEs, NOE-Transfers and NOTR reporting, along with bill hold insights such as outstanding orders, incomplete visits, sequential billing and plan of care issues Billing Dashboard provides visibility into claim errors, prior claim statuses and claim hold reasons, with claim notes available for quick documentation and reference Room and board claims are automatically generated when room and board is identified as a patient payer RUG level reimbursement and patient responsibility flow to claims to support a compliant claim submission process

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RN/RN Case Manager	RNs/RN case managers oversee patients' primary care, conducting admission assessments and routine patient visits. They update comprehensive assessments, complete IDG summaries, coordinate care and maintain communication with the IDG team, patients, families and referring physicians.	<ul style="list-style-type: none"> Provides and documents patient and caregiver education during the admission process Completes admission assessment(s) according to organization policy as well as state and federal regulations Following the admission comprehensive assessment, develops the plan of care in collaboration with other members of the IDG Writes admission orders, including the hospice aide plan of care, frequency, medication, DME and supply orders During subsequent visits, assesses the patient and, when necessary, writes orders to update the comprehensive assessment Prepares for IDG meetings by reviewing documentation to complete the comprehensive assessment/IDG Summary for each patient Conducts and documents supervision of LVNs, hospice aides and homemakers 	<ul style="list-style-type: none"> Initial and initial/comprehensive assessments include First Visit Intervention education documentation HOPE data flows from patient referrals to assessment documents Additional HOPE data is collected during the patient assessment The hospice plan of care and hospice aide plan of care are created during the patient assessment Admission orders are created during the assessment process and incorporated into the assessment documentation Visit notes include an order to update the patient's comprehensive assessment Progress Toward Goals and Interventions Performed This Visit narratives flow from notes to the patient's IDG Summary when Send Note to IDG Summary is selected Patient assessment data and orders flow to the IDG Summary Skilled nursing notes include LVN, hospice aide and homemaker supervision documentation
Hospice Aide	Under the direct supervision of a registered nurse, hospice aides provide personal care to patients in accordance with the hospice aide plan of care.	<ul style="list-style-type: none"> Reviews hospice aide plan of care prior to patient visit Provides and documents care according to the hospice aide plan of care Communicates with RN case manager regarding patient condition during visit 	<ul style="list-style-type: none"> The Hospice Aide Visit note is populated according to the hospice plan of care, ensuring the hospice aide provides care in accordance with the plan of care Visit notes prompt aides to ask if the patient is experiencing pain and to report pain to the RN case manager Documentation includes coordination of care with the RN case manager and facility staff when patients reside in nursing or assisting living facilities Mobile app and web-based documentation is easily completed electronically

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Nurse Practitioner	Nurse practitioners may serve as attending physicians if chosen by the patient, and may participate as members of the IDG. They conduct patient visits, including required face-to-face encounters.	<ul style="list-style-type: none"> Documents visits, including face-to-face visits When designated as the hospice patient's attending physician, completes physician orders and participates as a member of the IDG 	<ul style="list-style-type: none"> Mobile app and web-based documentation is easily completed electronically Nurse practitioner notes and face-to-face visits include the required attestation statement Physician-specific orders management streamlines the orders process and decreases the number of orders to be signed Attending the IDG meeting can be in person or virtual, enabling the nurse practitioner to join the meeting as scheduled
Social Worker	Hospice social workers are required members of the IDG and provide mental, psychological and emotional support for hospice patients and their caregivers and loved ones.	<ul style="list-style-type: none"> Completes psychosocial assessment within five days of admission to hospice Completes routine visits according to ordered frequency 	<ul style="list-style-type: none"> Hospice-specific Psychosocial Comprehensive Assessment includes the Social Work Assessment Tool, enabling the social worker to capture social work data for the patient and caregiver using data points that can be measured over time Hospice-specific Psychosocial Assessment includes suicide risk and bereavement assessments, as well as updates to the plan of care, emergency preparedness and advance directives for the patient Psychosocial visit notes include a link to the patient's plan of care, hospice-specific assessment tools and the option to send the Progress Toward Goals and Interventions Performed This Visit narratives to the patient's IDG Summary
Spiritual Counselor	Hospice spiritual counselors are members of the IDG and provide spiritual support for hospice patients and their caregivers and loved ones.	<ul style="list-style-type: none"> Completes spiritual assessment within five days of admission to hospice Updates the patient's plan of care Completes routine visits according to ordered frequency 	<ul style="list-style-type: none"> Spiritual Counselor Comprehensive Assessment includes assessment of the patient's spiritual needs, spiritual support and other spiritual factors that sustain the patient while preparing for death, as well as bereavement and suicide risk assessments and plan of care, emergency preparedness and advance directive updates Progress Towards Goals and Interventions Performed This Visit narratives flow from notes to the patient's IDG Summary when Send Note to IDG Summary is selected
Hospice Physician	Hospice physicians are members of the IDG, responsible for directing patient care and contributing to the development of and updates to the plan of care. They certify and recertify hospice eligibility and may conduct routine and face-to-face visits.	<ul style="list-style-type: none"> Documents visits, including face-to-face visits Completes certification of terminal illness Completes physician orders and participates as a member of the IDG 	<ul style="list-style-type: none"> Mobile app and web-based documentation is easily completed electronically Physician notes, face-to-face visits and certifications of terminal illness include the required attestation statement Physician-specific orders management streamlines the orders process and decreases the number of orders to be signed Attending the IDG meeting can be in person or virtual

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Volunteer Coordinator	<p>Volunteer coordinators oversee the hospice organization's volunteer program, including recruitment, screening and retention of volunteers. Their responsibilities include:</p> <ul style="list-style-type: none"> Ensuring accurate documentation of volunteer visits and hours Calculating and documenting the monetary value of hospice hours and cost savings Participating in IDG meetings and collaborating with the patient and their caregivers and loved ones Maintaining up-to-date volunteer personnel files. 	<ul style="list-style-type: none"> Educates volunteers to meet regulatory requirements and applicable accreditation standards Identifies and responds to patient/family volunteer needs Ensures accurate documentation of volunteer visits and hours. 	<ul style="list-style-type: none"> Education documentation can be uploaded to volunteer profiles and tracked according to date of training Volunteer Comprehensive Assessment identifies patient/family needs and serves as the volunteer plan of care Volunteer Center includes scheduled volunteer tasks, activities and bereavement services Eligible volunteer hours are used to generate the Volunteer Activity Report Volunteer Activity Report displays total volunteer hours, total patient care hours, percentage of volunteer hours, hours over/under required threshold, total cost savings and visit-specific volunteer details.
Bereavement Coordinator	<p>Bereavement coordinators provide individualized bereavement support to the patient's family, community and community partners.</p>	<ul style="list-style-type: none"> Maintains bereavement files, including the bereavement assessment, bereavement plan of care and documentation of bereavement services 	<ul style="list-style-type: none"> Bereavement Center includes bereaved profiles, bereavement assessment scores, plans of care and task scheduling Bereavement Center is attached to the patient's chart
Scheduler	<p>Schedulers are directly responsible for scheduling patients to members of the IDG, communicating with the team regarding patient scheduling, monitoring visit statuses, non-patient care activities and reports on visit and scheduling activities.</p>	<ul style="list-style-type: none"> Creates and maintains patient and employee schedules according to the patient's plan of care Tracks and reports missed visits, unassigned visits and visits not yet started Tracks and reports visit frequencies 	<ul style="list-style-type: none"> Schedule Dashboard displays current, historical and future visits, sorted by discipline and employee Schedule Dashboard displays visit alerts and frequency watch data Orders-driven scheduling enables scheduling to occur according to the ordered frequency and may be bypassed to allow for speed to care Patient frequency profiles display current frequencies and associated scheduled visits

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Administrator	Hospice administrators are responsible for managing the day-to-day operations of the hospice program, including clinical operations, financial management, compliance and other activities.	<ul style="list-style-type: none"> • Monitors referrals, admissions and discharges to plan and organize growth • Monitors HOPE compliance to ensure required acceptance threshold is met or exceeded • Monitors payers to ensure revenue opportunities are recognized • Monitors accounts receivable to identify and eliminate barriers to claim submission, ensuring accurate revenue recognition and timely receipt of accounts payable funds • Monitors clinical operations and compliance • Monitors payroll expenses • Monitors organization's financial performance 	<ul style="list-style-type: none"> • Admin Dashboard displays HOPE by Status, Census by Primary Payer, Census by Level of Care, Census by Status, Claims Ready for Billing, Bill Holds, Discharged Patients by Reason, Admissions by Benefit Period and Referral Conversion Rate by Admission Source widgets • Billing Dashboard displays Deposits (Last Seven Days + Future), Claim Count Summary and Eligibility Issues widgets • Patients Dashboard displays Recertifications Due and Advance Directives widgets • Orders Dashboard displays Outstanding Orders by Type, Top Physicians With Outstanding Orders, Reasons Preventing Billing and Outstanding Orders by Age widgets • Payroll Center displays Payroll Pending Approval, Approved/Pending Export and Exported/Paid widgets • Data in the Payroll Center can be filtered by organization, payroll date range, employee, payer, employee credentials, employment type, visit status, visit type and task • Report Center includes a Payroll Report, General Ledger Report, Month-End AR Aging Report, Month-End AR Roll Forward Report, Payment and Adjustment Activity Report, Earned Revenue (Completed Service Day Method) Report, Room and Board Contracts Report, Unbilled Accounts Receivable (Accrual Basis) Report, Service Intensity Add-On Report, Cap Statistics Report and Cost Report (Part II Statistical Data) • Axxess BI provides standard and organization-specific dashboards and reporting