

# **QUALITY ASSURANCE (QA) OVERVIEW QUICK REFERENCE GUIDE**

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## Common Buttons & Icons

	Location/branch.
	Task date range.
	Task/document type.
	Pending or Returned task status.
	Teal hearts indicate documentation was completed in AxxessCARE and will be returned via the AxxessCARE portal.
	Refreshes the table once new filtered items are selected.
	AxxessCARE icon will link directly to the AxxessCARE dashboard (if the agency uses AxxessCARE).
	Export the displayed list to an Excel document.
	Return multiple visits/tasks.
	Approve multiple visits/tasks.
	Filters by specific Payer.
	Search for specific Patient Name or MRN.
	Sorts task list by Patient, Date, Task or Clinician.
	Patient status.

## QUALITY ASSURANCE PROCESS:

### *Home/Quality Assurance (QA) Center*

When a clinician completes documentation, the tasks will appear in the QA center to be reviewed by the QA nurse or DON.

1. Choose branch, date range, task, status and/or payer.
2. Search by Patient Name or MRN.
3. Sort by Patient, Date, Task, Clinician and Status.
4. Select **Task** name hyperlink, PDF version populates and there are four choices (two additional for OASIS):

- a. **Edit** - Allows updates to task. Should only be used if QA nurse is the same clinician completing documentation.
- b. **Approve** - Processes documentation to Completed status.
- c. **Return** - Sends documentation back to the clinician for updates. QA nurse should provide clarification as to why the document is being returned. Clinician will then be notified on the dashboard and a **red** sticky note icon will appear in the notes column.
- d. **Print** - Print the documentation.
- e. **OASIS Scrubber** and **OASIS Export File** are available when reviewing OASIS documentation.
- f. **View Plan of Care** – to give clinical context when reviewing documents.

To approve or return multiple tasks:

1. Select/multi-select check boxes to the left.
2. Select **Return Selected** or **Approve Selected** (number selected in parentheses). **NOTE:** Notes cannot be added if multiple tasks are returned at the same time.

### **STICKY NOTE TYPES:**

Within the grid, the user may see three types of sticky notes that are color-coded according to type/purpose.

- **Red:** Notes related tasks that are returned for review (i.e. missed/returned visits).
  - *Patients/Patient Chart/Menu/Details*
- **Blue:** Notes related to the entire episode.
  - *Schedule/Schedule Center/Actions/Manage Episode*
- **Yellow:** Notes related to a specific task.
  - *Patients/Patient Chart/Menu/Details*

### **UPDATING RETURNED TASKS:**

*Patients/Patient Charts*

Clinician can update and resubmit any returned task directly from the patient chart, schedule center or mobile device.

1. Search for patient in left side pane.
2. Select patient.

3. Select **Task** hyperlink to reopen document.
4. View alert comments.
5. Make updates.
6. Complete and re-sign task.
7. Task goes back to QA for approval.

### **HELP**

Our Help Center is a great resource available 24/7. Here, you can get answers to frequently asked questions or watch videos on all our Axxess solutions. It can be accessed by going to *Help/Support & Training/Help Center* or <https://www.axxess.com/help/>