QUALITY ASSURANCE (QA) OVERVIEW QUICK REFERENCE GUIDE

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Common Buttons & Icons

Icon	Description
🏢	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
🔄 Refresh List	Refreshes the table once new filtered items are selected
♡ AxxessCARE	AxxessCARE icon will link directly to the AxxessCARE dashboard (if the agency uses AxxessCARE)
Export to Excel	Exports the displayed list to an Excel document
Return Selected	Return multiple visits/tasks
Approve Selected	Approve multiple visits/tasks
Payor: All	Filters by specific Payer
Search: Patient Name or MRN	Search for specific Patient Name or MRN
Patient Date Task Clinician	Sorts task list by Patient, Date, Task or Clinician
☐ ALL | ☑ ACTIVE ☐ DISCHARGED ☐ NON-ADMIT	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. **View Plan of Care** - Gives clinical context when reviewing documents.
f. **OASIS Scrubber** and **OASIS Export File** are available when reviewing OASIS documentation.
g. **Gross Margin Calculator** – Shows OASIS Episode Information, Cost Modeling, Payment Projection and OASIS Case-Mix Analysis.

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

QA for POC

1. Search for Patient.
2. Select **Plan of Care** hyperlink.
3. Select **Edit**.
4. Select **Add/Edit Plan of Care Profile**.
   a. Select ✎ or select the **Add/Edit Interventions, Goals, Medical Necessity, Homebound Status** hyperlink to add new care plan items for the selected problem statements.
   b. To add new problem statements:
      i. Select discipline tab.
      ii. Select ***Discipline* ADD ORDER** button.
      iii. Select problem statement.
      iv. Select interventions and goals (option to add medical necessity and homebound status).
      v. Select **SAVE & EXIT**.

HELP

Our on-demand Help Center provides answers to frequently asked questions, step-by-step training and video tutorials on Axxess products. Visit the Help Center by selecting *Support & Training/Help Center* under the *Help* tab or go to https://www.axxess.com/help/.