

HOSPICE QUALITY ASSURANCE (QA) TRAINING MANUAL

March 2022

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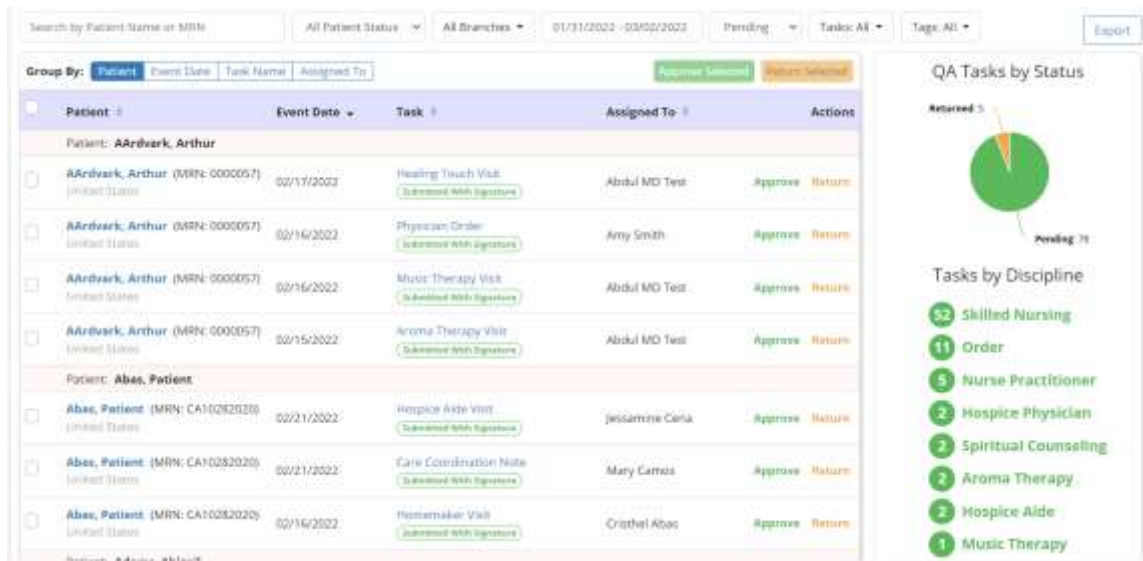
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QUALITY ASSURANCE (QA) CENTER OVERVIEW

Home/Quality Assurance (QA) Center

The QA Center is where the QA staff processes clinical documentation. QA staff can view, approve and return documents from within the QA Center. Clinical documentation that passes through the QA Center includes, but is not limited to: clinical notes, plans of care, physician orders, HIS documents, as well as infection surveillance and incident/accident reports.

To narrow down, the QA staff can also filter by searching, patient status, branch (if more than one), pending or returned tasks, tasks or tags. Group tasks by patient, event date, task name or who the task is assigned to. The information can be exported to Microsoft Excel for further analysis by selecting **Export**.



The screenshot displays the QA Center interface with the following elements:

- Search and Filter Bar:** Includes fields for "Search by Patient Name or MRN", "All Patient Status", "All Branches", a date range "01/31/2022 - 03/02/2023", "Pending" status filter, "Tasks: All", "Tags: All", and an "Export" button.
- Group By:** A dropdown menu set to "Patient".
- Task List Table:**

Patient	Event Date	Task	Assigned To	Actions
Patient: AArðvark, Arthur				
AArðvark, Arthur (MRN: 0000057)	02/17/2022	Healing Touch Visit	Abdul MD Test	Approve Return
AArðvark, Arthur (MRN: 0000057)	02/16/2022	Physician Order	Amy Smith	Approve Return
AArðvark, Arthur (MRN: 0000057)	02/16/2022	Music Therapy Visit	Abdul MD Test	Approve Return
AArðvark, Arthur (MRN: 0000057)	02/15/2022	Aroma Therapy Visit	Abdul MD Test	Approve Return
Patient: Abas, Patient				
Abas, Patient (MRN: CA10282020)	02/21/2022	Hospice Aide Visit	Jessamine Cera	Approve Return
Abas, Patient (MRN: CA10282020)	02/21/2022	Care Coordination Note	Mary Camda	Approve Return
Abas, Patient (MRN: CA10282020)	02/16/2022	Restorative Visit	Cristhel Abas	Approve Return
- QA Tasks by Status:** A pie chart showing 5 Returned tasks and 7 Pending tasks.
- Tasks by Discipline:** A vertical list of disciplines with counts: Skilled Nursing (32), Order (11), Nurse Practitioner (5), Hospice Physician (2), Spiritual Counseling (2), Aroma Therapy (2), Hospice Aide (2), and Music Therapy (1).

QA CENTER NAVIGATION

When a clinician completes documentation, the task will appear in the QA Center to be reviewed by the Clinical Manager, Director of Nursing or designated supervisor.

NOTE: Organizations may elect to bypass this process for specific clinicians by selecting 'Bypass QA Center' in their user permission. If 'Selected any Task to Bypass QA' is selected those tasks will not appear in QA.

When entering the QA Center, the default view shows all patient tasks that are ready for processing with an event date within the last month. Each column is also able to be arranged in ascending or descending order.



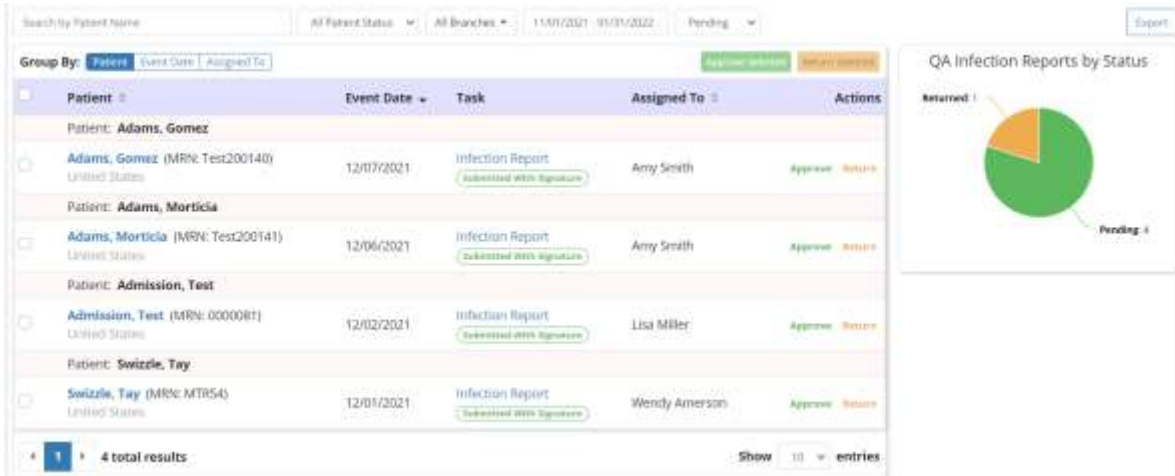
- Search - Enables users to search for a specific Patient Name or MRN.
- Patient Status - Filter by active, discharged, pending, non-admitted or deceased. The default is all.
- Branches - Filters by branch (if more than one).
- Date Range - Filters for specific task event dates, either write in or select the calendar.
- Task Status - Filters by pending or returned task status.
- Tasks - Search through the list of tasks or scroll down to select checkboxes for corresponding task(s).
- Tags - Search through the list of tags or scroll down to select checkboxes for corresponding tag(s).
- Group By - Sorts the QA task list by patient, event date, task name or assigned to.
- Export - Enables the user to export the displayed list to an Excel document.

The dashboard to the right will display a pie graph of pending and returned items broken out by Task by Discipline numbers. The dashboard also allows the user to move directly to the selected task status by selecting the chart. When the user selects the orange “Returned” section of the pie chart, the screen will show only the list of returned documents.



INFECTION REPORTS

The **Infection Reports** tab houses all infection reports that have been completed for the organization. View all the reports pending or returned from QA. The filters and search options are the same as the **Tasks** tab. Select the title of an infection report to open and review it. In the Actions column, select **Approve** to approve the infection report or **Return** to return the document for review and correction.



The screenshot displays the 'Infection Reports' interface. At the top, there are search filters for Patient Name, Patient Status (All Patient Status), Branches (All Branches), Date Range (11/01/2021 - 01/31/2022), and Status (Pending). Below the filters, a table lists infection reports with columns for Patient, Event Date, Task, Assigned To, and Actions. The table shows four reports for patients Adams, Gomez; Adams, Morticia; Admission, Test; and Swizzle, Tay. Each report has an 'Approve' button and a 'Return' button. To the right of the table is a pie chart titled 'QA Infection Reports by Status' showing 'Returned' (orange) and 'Pending' (green) categories. An 'Export' button is located in the top right corner.

When viewing a returned infection report, select **Message User** under Actions to send a message to the assigned user identifying the necessary corrections. The message will go directly to the user through the secure Message Center in Axxess Hospice.



This screenshot shows the 'Infection Reports' interface with filters set to 'Returned'. The table displays one report for patient Aaksojka, Keenan, dated 05/11/2020, assigned to Joan Zachariah. The 'Message User' button in the Actions column is highlighted with a red box.

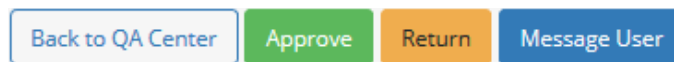
QUALITY ASSURANCE PROCESS

To complete QA review, select the appropriate patient and task.


NOTE: By selecting the patient name hyperlink, the system will automatically open the patient chart screen.



By selecting the task name, a preview version will load where users can Approve or Return a task at the bottom of the page.



- Back to QA Center – Returns the user to the QA Center.
- Approve - Processes the documentation to a Completed status.
- Return - To return documentation back to the clinician for requested updates. If returning documentation, the Clinical Manager/Supervisor/DON should provide clarification as to why the document is being returned using the Messaging Center. The clinician will then be notified through the Messaging Center.
- Message User – Send a message to the assigned user of the task.

When the **Message User** button is selected, a message box will generate under the document. Compose the message and select the  icon to send the message. Select **Return** to send the document back to the clinician for review.



To approve or return multiple tasks, the QA nurse must multi-select using the checkboxes on the left side of the screen. Once selected, the option to approve or return are available, along with the number of tasks selected.

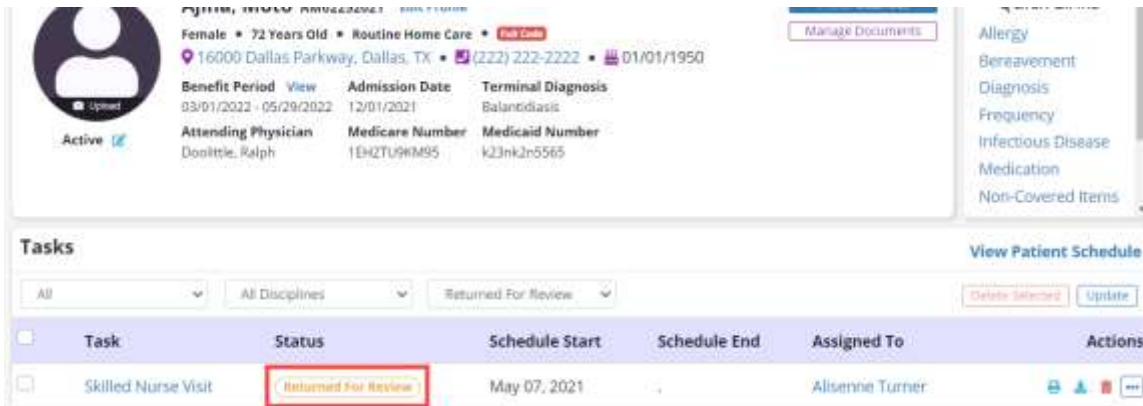


The screenshot shows a task management interface. At the top, there are filters for 'Group By' (Patient, Event Date, Task Name, Assigned To) and two buttons: 'Approve Selected 0' and 'Return Selected 0'. A red box highlights these buttons, with a '2' next to it. Below the filters is a table of tasks. A red box highlights the checkboxes on the left side of the table, with a '1' next to it. The table has columns for Patient, Event Date, Task, Assigned To, and Actions. The tasks listed are:

Patient	Event Date	Task	Assigned To	Actions
Patient: Accord, Chunkmunk				
Accord, Chunkmunk (MRN: Accord0150) United States	10/16/2020	Hospice Aide Visit <i>Submitted With Signature</i>	Christopher CJ	Approve Return
Accord, Chunkmunk (MRN: Accord0150) United States	10/13/2020	Hospice Aide Visit <i>Submitted With Signature</i> Missed Visit	Christopher CJ	Approve Return
Patient: Agarwal, Tarun				
Agarwal, Tarun (MRN: TA10162020) United States	10/16/2020	RN Initial/Comprehensive Assessment <i>Submitted With Signature</i>	Sankalp Gupta	Approve Return

UPDATING RETURNED TASKS

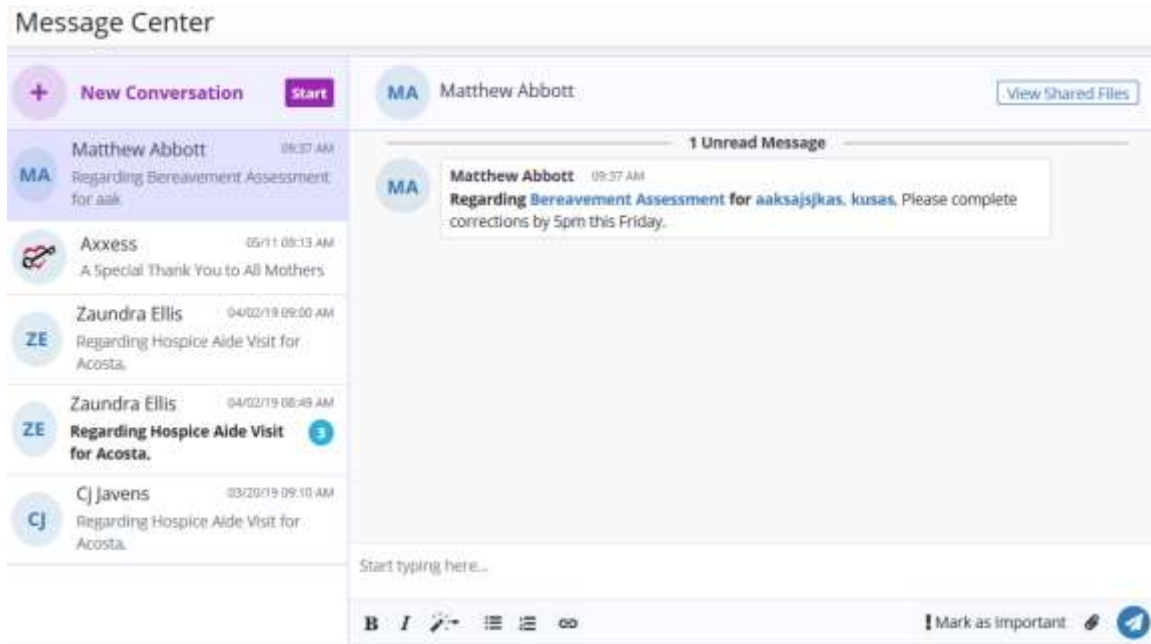
If a document is returned, the clinician will be able to update and resubmit directly from the patient chart screen or schedule center. Tasks listed as “Returned For Review” in orange are ready for the clinician to make edits.



The screenshot shows a patient chart screen. At the top, there is a patient profile card with a photo, name, gender, age, and location. Below the profile card is a 'Tasks' section. The 'Tasks' section has filters for 'All', 'All Disciplines', and 'Returned For Review'. There are buttons for 'Delete Selected' and 'Update'. The task list has columns for Task, Status, Schedule Start, Schedule End, Assigned To, and Actions. The task listed is:

Task	Status	Schedule Start	Schedule End	Assigned To	Actions
Skilled Nurse Visit	Returned For Review	May 07, 2021		Alisenne Turner	🔍 📌 🗑️

Selecting the task will reopen the document for editing by the clinician. The clinician can view the comments regarding the document in the Message Center and reply/respond back about the editing request.



Message Center

+ New Conversation **Start**

MA Matthew Abbott [View Shared Files](#)

1 Unread Message

MA Matthew Abbott 09:37 AM
Regarding Bereavement Assessment for aaksajsjkas, kusas, Please complete corrections by 5pm this Friday.

Matthew Abbott 09:37 AM
Regarding Bereavement Assessment for aak



Axxess 05/11 09:13 AM
A Special Thank You to All Mothers

Zaundra Ellis 04/02/19 09:00 AM
Regarding Hospice Aide Visit for Acosta.

Zaundra Ellis 04/02/19 08:49 AM
Regarding Hospice Aide Visit for Acosta. 3

CJ Javens 03/20/19 09:10 AM
Regarding Hospice Aide Visit for Acosta.

Start typing here...

B I  **Mark as important** 

There is a direct hyperlink to the returned visit or patient chart to make edits and/or review.

When a task has been approved in the QA Center, it will have the status of **Completed**. Tasks that are pending approval in QA Center will have the label **Submitted With Signature**. Once the clinician completes their review/updates, the task will repopulate back in the QA Center for QA Review.

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 on all our Axxess products. Our Help Center can be accessed by selecting *Help/Help Center* or <https://www.axxess.com/help/>.

