

# **HOSPICE IDG QUICK REFERENCE GUIDE**

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## **IDG CENTER**

*IDG Center/Interdisciplinary Group (IDG) Center*

Search - Organize results by choosing the branch or search by team name to narrow results. Users can also scroll down the list of IDG Groups.

Top Tiles - The team's name and members are displayed in the left tile. Select the **Edit Team** hyperlink to add or update team information. The number of recertifications and unassigned patients appear in the right tiles.

The IDG Center is split into five tabs.

## **UPCOMING AGENDA**

The **Upcoming Agenda** tab displays information for the team's next IDG meeting. Patients are categorized into the following sections based on their activity in the software:


- Death
- Discharge
- Admission
- Recertification Due
- Level of Care Changes
- Active


Each patient tile shows the patient's name, MRN, team name and Quick Links. Selecting the **View IDG Summary** hyperlink enables the user to view and update the IDG Summary. Select the **View Prep Report** button to look at categories of patients on the Meeting Agenda and searches for the statuses of key documents.

## **MEETINGS**

The **Meetings** tab displays all meetings that have occurred and are scheduled for the team.

Select **View Meeting**. Meeting details will show the team's name, meeting start time, attendees team members and non-team members.

 = Remove Non-Team Members

 = Attendees Joined Meeting

## Prep Report

Looks at categories of patients on the meeting agenda and searches for the statuses of key documents.


## Task

If a task is not present and should be present, you can schedule the document directly from the IDG Prep Report by:

1. Select **Create Task**.
2. Schedule Center opens in a new tab and populates the required task in the task field.
3. Fill in details.
4. Select **Save Task**.

## Message

To send a message to a user or group of users regarding an incomplete task:

1. Select **Send Message**.
2. Enter recipients.
3. The message will automatically include a link to the patient's chart identifying the task in question.
4. Select .

## Agenda

All patients who belong to the care team appear regardless of their IDG group within the care team.

## Add Attendee

Enables users to ensure coverage for any members of the IDG who may not be able to attend the meeting.

1. Select **Add Attendee**.
2. Type user's name.
3. Select **Save**.

## Add Patient

Enables users to add any patient on the same care team (but in a different group) for the team to discuss prior to the patient's regularly scheduled IDG meeting.

1. Select **Add Patient**.
2. Enter the patient's name.
3. Choose category.

4. Select **Save**.

### **TEAM MEMBERS**

Displays a list of users who have been added to the team.

- Select **Message User** to message any team member directly.
- Select **Edit Team** to add, remove or update members of the team.

### **GROUPS**

Displays the Group Name and Hospice Physician of each group within the team.

- Select the Hospice Physician hyperlink for a direct link to their information in the People Center.
- Select **Edit Team**.
  - Go to the **Groups** tab to add, edit or remove.

### **PATIENTS**

Displays the patient's name, MRN, recertification date and group for each patient in the team.

A badge appears next to the patient's name to alert users to upcoming and past due recertifications dates:

Upcoming – 15 to 30 days before recertification due date.


At Risk – One to 14 day(s) before recertification due date.

Past Due - Recertification due date has passed.

- Select the **Edit Team** to edit the patients in this list.
- Change an individual patient's care team from the patient profile.

### **RUNNING A MEETING**

*IDG Center/Interdisciplinary Group (IDG) Center/Meetings*

1. Select **Go to Meeting**.
2. Select **Start Meeting**. **NOTE:** Users must have permissions to start meetings in their profile and be listed as an attendee for the meeting.
3. User attendance is recorded. Once the meeting has been started, other attendees can select **Join Meeting** to record their attendance.
4.  shows attendees who are logged in to the meeting.
5. Select **Manage Attendees** to expand the section and make updates to the attendee's section, including adding members.

6. Select **Mark as Reviewed** to indicate discussion is done including documentation.
  - a. A green checkmark will appear next to the patient's name.
  - b. Select **Mark as Not Reviewed** to enable any additional last-minute discussion.
7. Move to the next patient on the left-side menu.

### Summary/Comprehensive Assessment Update

**Assessments** - The IDG Summary/Comprehensive Assessment Update enables Progress Toward Goals to flow automatically from each clinical document to the IDG Summary/Comprehensive Assessment. Instead of allocating time to writing IDG notes, clinicians can incorporate their routine visit documentation for each discipline into the Comprehensive Assessment automatically.

- All changes to physician orders will automatically flow to the IDG Summary/Comprehensive Assessment.
- Select the **Current Plan of Care Effective for Symptom Management** box to include as part or all the discipline's IDG update on the visit.
- Select the **Send Note to IDG Summary** box to send the Progress Toward Goals section of the clinical note to the IDG Summary/Comprehensive Assessment.
- The IDG Summary/Comprehensive Assessment Update can be documented manually in the IDG Center. A user who has not had a visit with the patient in two weeks should update the IDG note manually.

**IDG Meeting Details** - Hovering over the expanding **Quick Links** hyperlink enables users to preserve work in the IDG note while viewing the Patient Chart, Patient Schedule, Medication Profile, Plan of Care, or adding a new Frequency or Diagnosis physician order in a new tab.

- Select the **Show Details** button to see the patient chart.
- The **Plan of Care Profile** and **Review Medication Profile** buttons provide easy access to other parts of the patient's chart.

**Discipline Frequencies** - The visit frequencies for all ordered disciplines auto-populate from the most recent frequency orders.

**New Orders/Plan of Care Updates Since Last IDG Meeting** - Shows any orders made since the last IDG meeting took place. Select **Remove** to delete any orders.

**Scales/Measurements** - Scales and measurements automatically populate from the most recent certification assessment (RN Initial/Comprehensive Assessment or RN Recertification Assessment) for comparison to the most recent Skilled Nursing Visit.

- The PPS/KPS, MAC/Arm, Height, Weight, BMI, NYHA and FAST scores flow from the **Vital Signs/Additional Measurements** sections of the nursing visit notes.
- The Braden and Fall scores come from the **Integumentary** and **Functional** sections of the nursing visit notes.
- The Pain score shows the patient's most recent pain score from the verbal or non-verbal scale and the patient's worst pain score since the last skilled nurse visit.

**Updates/Progress Toward Goals** - Updates and progress toward goals flow from the clinical documents into this section.

If the clinician selects Send Note to IDG:

The information will flow into this area with the date of the visit note and the clinician who documented the update. The update can be edited by the clinician who entered it and new updates can be manually entered if necessary.

If the clinician does not select Send Note to IDG:

Users can select disciplines here to add notes manually by entering text and selecting **Add Update**.

**IDG Discussion** - Users can document discussions during the IDG meeting. Any user who has joined the meeting can document in this section.

- Select the **Patient, Family/Caregiver** and/or **Facility Staff** checkboxes to document their involvement.
- Enter the name(s) of collaborator(s).

**Coordination of Care** - Care coordination between the hospice IDG, attending physician, and nursing care/residential facilities can be selected.

## **ENDING MEETING**

Once all patients on the agenda have been discussed and marked as reviewed, green check marks will appear on each section of the agenda.

- Select **End Meeting** to end the meeting. **NOTE:** A meeting cannot be ended until all core team members have signed in to attend the meeting.
  - This creates the next meeting, agenda and IDG summaries.
- Confirm the next meeting date and time, which defaults to the team's meeting schedule but can be edited as needed. **NOTE:** The system will facilitate your compliance by ensuring that patients are discussed at least every 15 days (permissions required Company Setup setting).



## 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/>

