

# **HOME HEALTH QUALITY ASSURANCE (QA) TRAINING MANUAL**

August 2022

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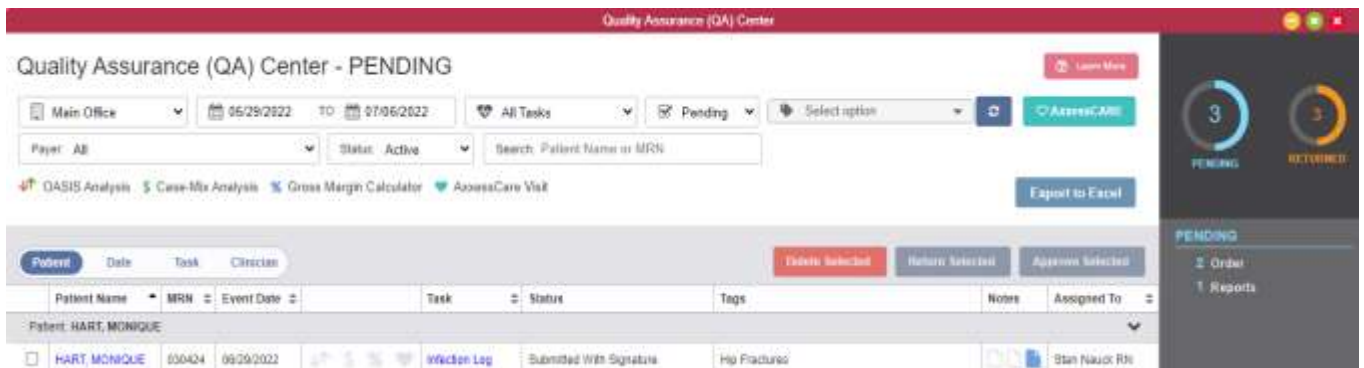
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## QUALITY ASSURANCE (QA) CENTER OVERVIEW

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

The Quality Assurance (QA) Center is where the QA staff processes clinical documentation. QA staff can view, edit, approve and return documents from the QA Center. Clinical documentation that passes through the QA Center includes, but is not limited to: clinical notes, OASIS assessments, Plans of Care, interim orders, summaries, as well as infection and incident reports.

When entering the QA Center, the default view shows active patient tasks that are ready for processing with an event date within the last seven days. To better narrow, the QA staff can also adjust the patient status, date range or grouping to view tasks by patient, date, task or clinician. The information can be exported to Microsoft Excel for further analysis.



The screenshot displays the 'Quality Assurance (QA) Center - PENDING' interface. At the top, there are filters for 'Main Office', date range (9/29/2022 to 10/06/2022), 'All Tasks', and 'Pending'. A search bar is available for 'Patient Name or MRN'. Below the filters, there are tabs for 'OASIS Analysis', 'Case-Mix Analysis', 'Gross Margin Calculator', and 'AccessCare Visit'. A table lists tasks for patient HART, MONIQUE, with columns for Patient Name, MRN, Event Date, Task, Status, Tags, Notes, and Assigned To. One task is visible: 'Wickon Log' with status 'Submitted With Signature' and tag 'Hip Fracture'. On the right side, there are two circular gauges showing '3 PENDING' and '3 RETURNED' tasks, along with a sidebar for 'PENDING' tasks including 'Order' and 'Reports'.

## QA CENTER NAVIGATION

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

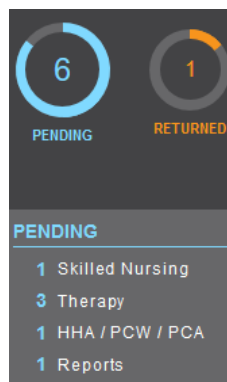
**NOTE:** Organizations may select to bypass this process for specific clinicians by selecting 'Bypass QA Center' in user permission. If any Task to Bypass QA in the Company Setup is selected, those Tasks will not appear in QA.

By default, the QA Center will display all pending tasks ready for review. Filter options at the top allow for the QA nurse to filter by Patient, Date, Task, Status, Tag and Payer.



- Location/Building Icon - Filters by location/branch (if more than one).
- Calendar Icons - Filters for specific task event dates. Either write in or select the calendar.
- Heart Icon - Filters by task/document type.
- Check Box - Filters by pending or returned task status.
- Tag Icon - Filters by tags.
- Refresh List Icon - Refreshes the table once new filter items are selected.
- Access CARE - If the organization is an Axxess CARE user, the Axxess CARE icon will link directly to the dashboard.
- Search - Allows users to search for a specific patient name or MRN.
- Payer - Filters by specific payer.
- Status - Filter between active, discharged and non admit status.
- Search Bar - Free text box to search for a specific patient name or MRN.
- Patient/Date/Task/Clinician - Sorts the QA task list by the user selected option.
- All/Active/Discharged/Non-Admit - Filters the QA task list by patient status.
- Export to Excel - Allows the user to export the displayed list to an Excel document.

The dashboard to the right will indicate Pending and Returned items broken out by task and based on the filters chosen.



## QUALITY ASSURANCE PROCESS

To complete QA review, select the appropriate patient and task. By selecting the Task name, a preview version will load where users can **Edit**, **Approve**, **Return** or **Print**.

**NOTE:** By selecting the Patient Name, the system will automatically open the patient chart screen.

Patient Name	MRN	Event Date	Task	Status
Patient: MISTRY9, DIMP L.				
<input type="checkbox"/> MISTRY9, DIMP L.	DM2222	06/23/2021	PT Assessment/Evaluation	Submitted With Signature
<input type="checkbox"/> MISTRY9, DIMP L.	DM2222	06/23/2021	PT Plan of Care with Full Evaluation	Submitted (Pending QA Review)

Main Office 16000 Dallas Pkwy Suite 700 Dallas, TX, 75248 Phone: (214) 327-2683 Fax: (214) 575-7711		<h3>Physical Therapy Assessment/Evaluation</h3>	
<b>Mistry9, Dimp L.</b>		DOB: 05/28/1925	MRN: DM2222
<b>VISIT INFORMATION</b>			
Time In: 7:00 AM	Travel Start Time:	Surcharge:	Visit Date: 06/23/2021
Time Out: 7:30 AM	Travel End Time:	Associated Mileage:	
Physician Last Visit Date:			
Primary Dx: Hypert and chr kidney dis w/o hrt fail, w stig 5 chr kidney/ESRD    Secondary Dx: Essential (primary) hypertension			
Therapy Diagnosis:			
<b>VITAL SIGNS</b>			
<b>LIVING SITUATION</b>			
Dwelling		Plan of Care: Caregiver Status	
Patient's Home/Residence		Caregiver Availability/Type of Assistance	
Comments			
Patient Living Situation			
(M1100) Which of the following best describes the patient's residential circumstance and availability of assistance? (Check one box only.)			
Living Arrangement: Patient lives alone Around the Clock			
<b>PHYSICAL ASSESSMENT</b>			
Prior Level of Functioning		Prior Therapy Received	
Select Level		Has received home health therapy	
Bed Mobility		<input type="checkbox"/> OT <input type="checkbox"/> PT <input type="checkbox"/> ST	
Transfers		Has received inpatient therapy	
Balance Sitting		<input type="checkbox"/> OT <input type="checkbox"/> PT <input type="checkbox"/> ST	
Balance Standing			
<input type="button" value="View Plan of Care"/> <input type="button" value="Edit"/> <input type="button" value="Approve"/> <input type="button" value="Return"/> <input type="button" value="Print"/> <input type="button" value="Close"/>			

- Edit - Allows the QA nurse to edit task documentation. This option should only be used if the QA nurse is the same clinician completing the documentation.
- Approve - Processes the documentation to completed status.
- Return - To return documentation to the clinician for requested updates. If returning documentation, the QA nurse should provide clarification as to why the document is being returned. Enter the text then select the **Return** button. The clinician will then be notified on their dashboard and a red paper icon will appear in the notes column.
- Print - Allows the user to print the documentation.

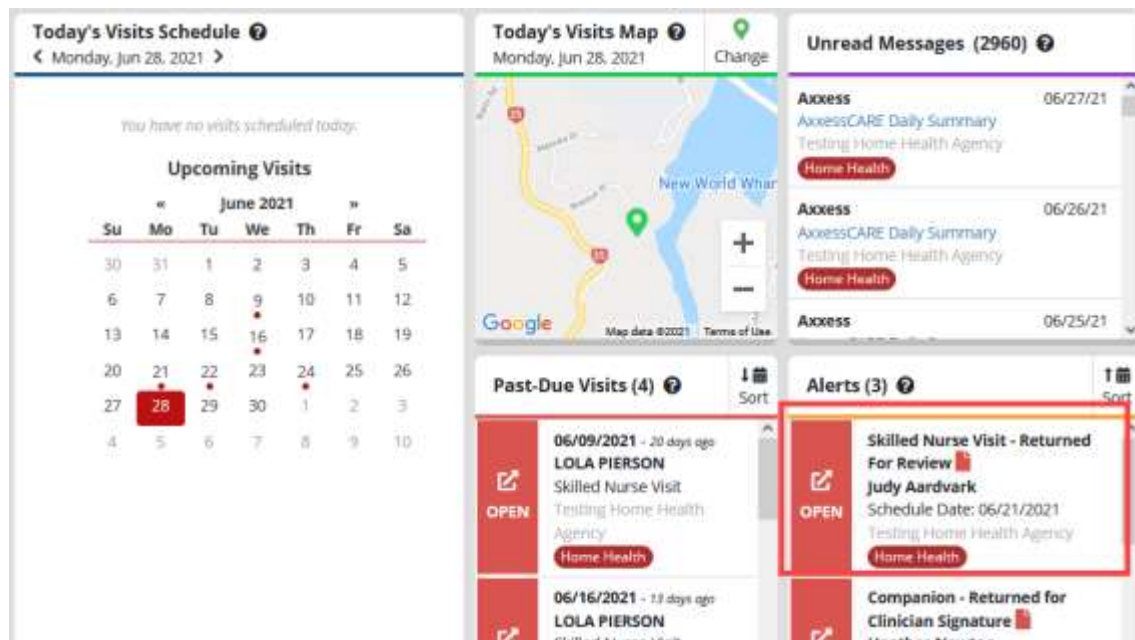
**NOTE:** When reviewing OASIS documentation, the QA nurse will have additional options to review **OASIS Scrubber** information, generate an **OASIS Export File** and see the **Gross Margin Calculator**.



Return Reason

Enter return reason here then select the Return button below. Communication between QA staff and clinicians will be listed above.

Return Close



**Today's Visits Schedule** Monday, Jun 28, 2021

You have no visits scheduled today.

**Upcoming Visits**

June 2021						
Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

**Today's Visits Map** Monday, Jun 28, 2021

New World Wharf

**Unread Messages (2960)**

- Access - AccessCARE Daily Summary - Testing Home Health Agency - Home Health - 06/27/21
- Access - AccessCARE Daily Summary - Testing Home Health Agency - Home Health - 06/26/21
- Access - 06/25/21

**Past-Due Visits (4)**

- 06/09/2021 - 20 days ago - **LOLA PIERSON** - Skilled Nurse Visit - Testing Home Health Agency - Home Health
- 06/16/2021 - 13 days ago - **LOLA PIERSON** - Civilian Nurse Visit

**Alerts (3)**

- Skilled Nurse Visit - Returned For Review - **Judy Aardvark** - Schedule Date: 06/21/2021 - Testing Home Health Agency - Home Health
- Companion - Returned for Clinician Signature - **Weather Newton**

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

**NOTE:** Users cannot add a note if multiple tasks are returned at the same time.

		Delete Selected (3)		Return Selected (3)		Approve Selected (3)						
Patient Name	MRN	Event Date	Task			Status	1 2 s	Assigned To				
Patient: PLUMB, ABBY B.												
<input checked="" type="checkbox"/>	PLUMB, ABBY B.	55889	06/24/2021	↑	↓	5	3%	♥	HHA Visit	Submitted With Signature		Ladawn Pierce RN
<input checked="" type="checkbox"/>	PLUMB, ABBY B.	55889	06/23/2021	↑	↓	5	3%	♥	Physician Order	Submitted (Pending QA Review)		Ladawn Pierce RN
<input checked="" type="checkbox"/>	PLUMB, ABBY B.	55889	06/22/2021	↑	↓	5	3%	♥	HHA Care Plan (Generated)	Submitted With Signature		Ladawn Pierce RN

NOTE: Teal hearts next to the task indicate the documentation was completed through Axxess CARE and will be returned to the clinician via the Axxess CARE portal. Also note users will not be able to multi-select to return or approve these tasks.

### STICKY NOTE TYPES

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

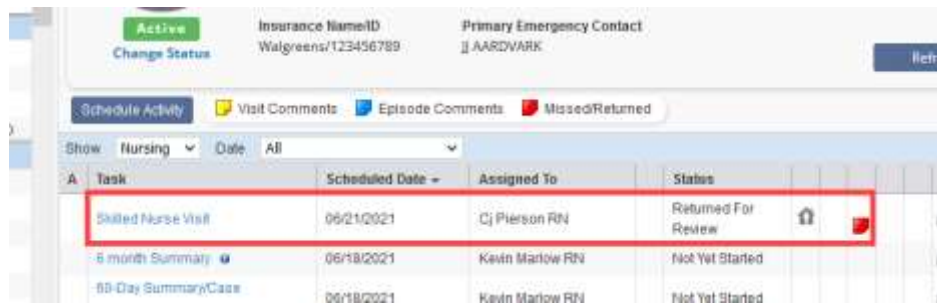
		Return Selected (2)		Approve Selected	
Notes	Assigned To				
Completed (Pending QA Review)					
Submitted (Pending QA Review)					

- Red - Notes related to tasks that have been returned for review.
- Blue - Notes related to the entire episode of care.
- Yellow - Notes related to a specific task.



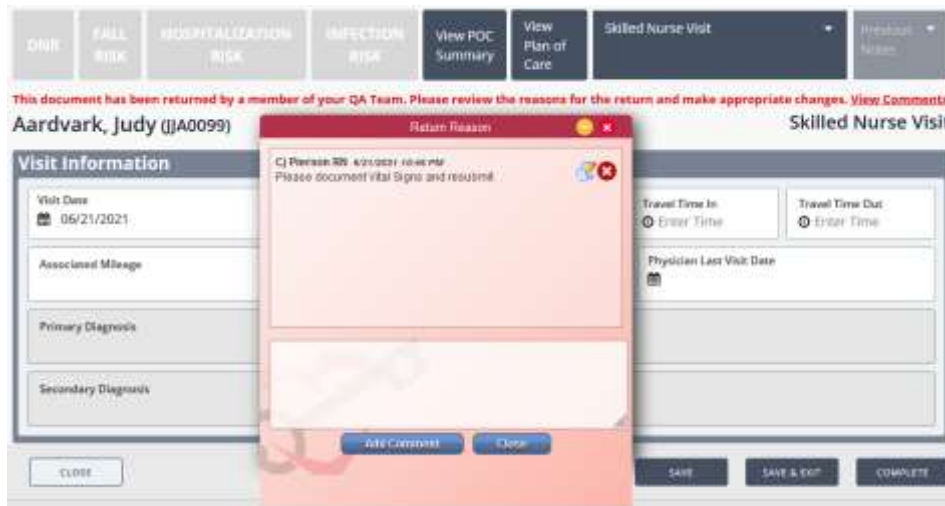
### UPDATING RETURNED TASKS

If a document is returned, the clinician will be able to update and resubmit directly from the patient chart screen, schedule center or mobile device.



Task	Scheduled Date	Assigned To	Status
Skilled Nurse Visit	06/21/2021	CJ Pierson RN	Returned For Review
6 month Summary	06/18/2021	Kevin Marlow RN	Not Yet Started
60-Day Summary/Case	06/18/2021	Kevin Marlow RN	Not Yet Started

Selecting the hyperlink task will reopen the document and alert the clinician that the QA team has returned the task. Select the **View Comments** hyperlink. Enter the text and select the **Add Comment** button to reply to the QA team.



This document has been returned by a member of your QA Team. Please review the reasons for the return and make appropriate changes. [View Comments](#)

Aardvark, Judy (JJA0099)

**Return Reason**

CJ Pierson RN 6/21/2021 10:46 AM  
Please document vital signs and re-eval.

Visit information

Visit Date: 06/21/2021

Associated Message

Primary Diagnosis

Secondary Diagnosis

Travel Time In: Enter Time

Travel Time Out: Enter Time

Physician Last Visit Date

Buttons: Add Comment, Close, Save, Save & Exit, Complete


Once the clinician completes their review, the task will repopulate back in the QA center for review.

**NOTE:** When editing a physician order from the QA screen, wound orders can only be updated through the **Wound Care Orders** section

## QA for OASIS

The OASIS analysis icon turns red and green when OASIS analysis is applicable to the QA item. Documentation where OASIS analysis is applicable includes OASIS D-1 Discharge, Resumption of Care, Recertification and Follow-Up.



Select the OASIS analysis icon  to generate the OASIS analysis. Data in the OASIS analysis is dependent on the type of OASIS assessments currently under review by QA.

If the previous OASIS assessment was completed in your legacy system, its data cannot be compared to the current OASIS in the analysis. When the OASIS under review is an OASIS-D1 Resumption of Care, Recertification or Follow-Up, the analysis will provide a side-by-side comparison of all OASIS items that have been answered differently in the previous and current assessments.

Patient Name Hadley, Direct MRN 21-100011 DOB 1/1/1939		OASIS Analysis - Comparisons	
Comparison			
Question	Previous Assessment OASIS - D1 Start of Care 04/09/2021	Current Assessment OASIS-D1 Recertification 06/04/2021	Status
Functional Status			
(M1800) Grooming	0 - Able to groom self unaided	1 - Grooming utensils must be placed within reach	Declined ↓
(M1820) Dress Lower Body	1 - Able to dress lower body without assist if clothing and shoes are provided	2 - Someone must help the pt put on undergarments, slacks, socks, and shoes	Declined ↓
(M1840) Toilet Transferring	1 - When assisted by another person, able to get to and from the toilet	0 - Able to get to and from the toilet independently	Improved ↑

When the OASIS under review is an OASIS-D1 discharge, the OASIS analysis will include an additional Patient Outcomes section. This section will compare the current OASIS assessment to the previous OASIS-D1 SOC or OASIS-D1 ROC assessment. The Comparison section will provide a side-by-side comparison of all answers that have been answered differently in the previous and current assessments.

Patient Name: GONZAGA, SAMPLE MRN: 369852148 DOB: 11/3/1945		OASIS Analysis - Outcome and Comparisons	
<b>Patient Outcomes</b>			
Question	Previous Assessment OASIS-D1 Start of Care: 06/01/2020	Current Assessment OASIS-D1 Discharge: 01/26/2021	Outcome
How often patients got better at walking or moving around.			
(M1860) Ambulation	1 - With the use of a one-handed device	0 - Independently	Improved ↑
<b>Comparison</b>			
Question	Previous Assessment OASIS - D1 Start of Care: 11/28/2020	Current Assessment OASIS-D1 Discharge: 01/26/2021	Status
Functional Status			
(M1810) Dress Upper Body	2 - Someone must help the patient put on upper body clothing.	0 - Without assistance.	Improved ↑

**NOTE:** There is a Disable OASIS Lock setting in Company Setup that enables clinicians to return or edit OASIS assessments during a closed accounting period without an electronic signature override. When this setting is selected, users will be able to edit and return OASIS assessments from the QA Center regardless of closing date. When this setting is not selected, the OASIS will remain locked and users must provide an electronic signature to edit or return the OASIS during a closed accounting period.

### QA for POC

When making changes to the Plan of Care, the gray (pull to POC) sections and the green (OASIS) sections of the OASIS assessment must be updated first.

**NOTE:** The blue (physical assessment) and purple (POC pathways) sections of the OASIS cannot be altered by back office staff.

To make changes to the purple sections from QA, select Plan of Care and then select the purple button in the **Orders for Discipline and Treatment** section to edit or add interventions, goals, medical necessity and homebound status. Always make the changes from the Plan of Care.

Filter	Date	Task	Clinician	Tasks Selected	Notes Selected	Approve Selected
Patient Name	MRN	Event Date	Task	Status	Notes	Assigned To
Patient: CENA, JOHN						
<input type="checkbox"/>	CENA, JOHN	01/16/2021	OASIS-D1 Start of Care	Completed (Pending QA Review)		Rohit Matha PDI
<input type="checkbox"/>	CENA, JOHN	01/16/2021	Plan Of Care	Submitted (Pending QA Review)		Rohit Matha PDI

Select **Edit** to make the changes or add interventions, goals, medical necessity and homebound status.

35 Care Plan ( )	<b>Caregiver Status</b> There is no data for this sec
<span>Edit</span> <span>Approve</span> <span>Return</span> <span>Print</span> <span>Close</span>	

Select the purple **Add/Edit Plan of Care Profile** button.

**Orders For Discipline and Treatment** Add/Edit Plan of Care Profile


Frequency:  
 SN Frequency: 1w5  
 PT Frequency: 1w1

skilled nurse developed patient plan of care with patient/caregiver involvement to be countersigned by physician. SN to perform complete physical assessment each visit with emphasis on disease process. SN to assess other co-morbidities including COPD and stage 2 PU and other conditions that present themselves during this episode of care. SN to recognize and intervene to minimize complications; notify physician immediately of any potential problems that impede completion of patient recovery and desired goals.

Nursing

SN to assess integumentary status. Identify any signs and symptoms of impaired skin integrity, report significant changes to physician.  
 SN to instruct patient on disease process, including who to contact if signs and symptoms persist or worsen as well as dietary, hydration

REFRESH Format/Edit SAVE COMPLETE

To make changes to current interventions, goals, medical necessity and homebound narratives that were entered, select the  icon or select the **Add/Edit Interventions, Goals, Medical Necessity, Homebound Status** hyperlink to add new care plan items for the selected problem statements.

**Plan of Care Profile**

The Plan of Care Profile is a listing of all active treatment orders for each discipline, allowing you to manage Interventions, Goals, Medical Necessity, and Homebound Status.

SN PT OT ST

Refresh SN ADD ORDER Cancel All

Intervention	Intervention Description	Name	Effective Date	Action
<p><b>High Risk: Potential for Hospitalization</b></p> <p>Patient assessed to be at high risk for emergency department visits and/or hospital readmission. All necessary interventions to address the underlying risk factors are as follows: test</p>				
Perform Medications Risk Factors <span style="background-color: #4a4a8a; color: white; padding: 2px;">Intervention</span>	SN to minimize/eliminate risk for hospitalization due to identified problems with medications polypharmacy, risk associated with name of high risk medications, requiring help with managing medications and noncompliance	Misha, Rohit	6/16/2021	<span style="color: blue;">Add/Edit Interventions, Goals, Medical Necessity, Homebound Status</span> Discontinue Delete
No Acute Care Hospitalization <span style="background-color: #4a4a8a; color: white; padding: 2px;">Goal</span>	Patient will have no acute care hospitalizations, ER visits nor readmissions during this episode of care.	Misha, Rohit	6/16/2021	- Select to resolve -

SN ADD ORDER CANCEL SN SAVE SN SAVE & EXIT

To add new problem statements, select the desired discipline.



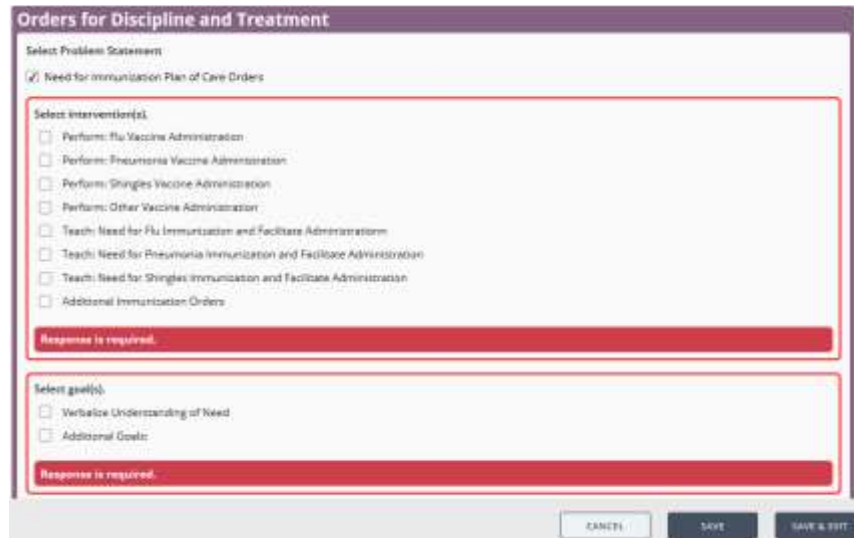
Then select the **SN ADD ORDER** button.



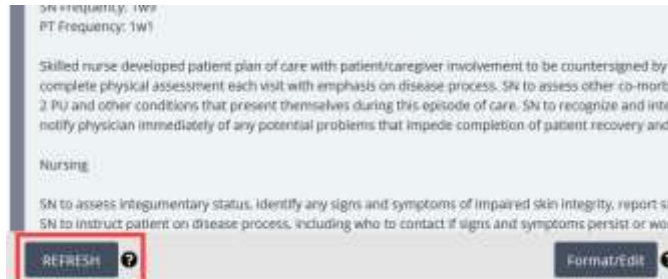
Select a problem statement.



Select Interventions and Goals. Add medical necessity and homebound status if desired. Select the **SAVE & EXIT** button when complete. This takes the user back to the Plan of Care



Select **REFRESH** to pull all changes over before approving the POC from QA.



Approve all therapy assessments/reassessments prior to approving the Plan of Care. Users may select **Format/Edit** if desired to format the text for the desired presentation. Any edited text will not flow to the Plan of Care Profile nor the Plan of Care Summary.

## HELP CENTER

A great resource available any time, any day is our Help Center. Get answers to frequently asked questions and watch tutorial videos on all our Axxess products. Our Help Center can be accessed by going to *Help/Help Center* or <https://www.axxess.com/help/>

