HOME HEALTH QUALITY ASSURANCE (QA) OVERVIEW QUICK REFERENCE GUIDE

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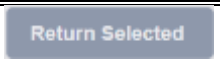
Common Buttons & Icons

	Location/branch
	Task date range
	Task/document type
	Pending or returned task status
	Teal hearts indicate documentation was completed in Axxess CARE and will be returned via the Axxess CARE portal.
	Refreshes the table once new filtered items are selected.
	Axxess CARE icon will link directly to the Axxess CARE dashboard (if the organization uses Axxess CARE).
	Exports the displayed list to an Excel document
	Return multiple visits/tasks.
	Approve multiple visits/tasks.
	Sorts task list by Patient, Date, Task or Clinician.
	OASIS Analysis
	Case-Mix Analysis
	Gross Margin Calculator

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

QUALITY ASSURANCE PROCESS

Home/Quality Assurance (QA) Center

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

1. Choose the branch, date range, task, pending or returned options, tags, status and/or payer.
2. Search by the Patient Name or MRN.

3. Sort by the Patient, MRN, Event Date, Task, Status, Tags, Notes, or Clinician.
4. Select the **Task** name hyperlink. The PDF version populates and there are six choices including **Close** (two additional for OASIS):
    a. **Edit** – Allows updates to the task. Should only be used if the 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. The QA nurse should provide clarification as to why the document is being returned. The 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.

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

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). **Delete Selected** is also an option with associated permissions.

NOTE: Notes cannot be added if multiple tasks are returned at the same time. 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. 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.

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

UPDATING RETURNED TASKS

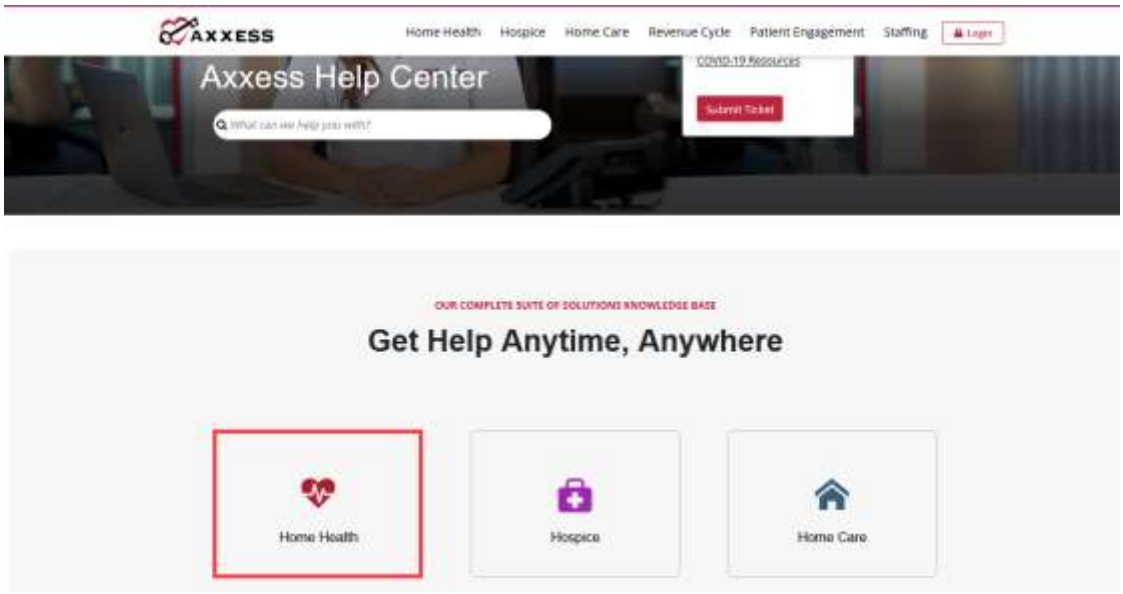
Patients/Patient Charts

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

1. Search for the patient.
2. Select the **Task** hyperlink to reopen the document.
3. Select the red **View Comments** alert at the top.
4. Make updates.
5. Complete and re-sign the task.
6. The task goes back to QA for approval.

QA for POC

1. Search for the patient.
2. Select the **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 the discipline tab.
      ii. Select the ***Discipline* ADD ORDER** button.
      iii. Select the problem statement.
      iv. Select the interventions and goals (option to add medical necessity and homebound status).
      v. Select **SAVE & EXIT**.

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/