

HOSPICE QUALITY ASSURANCE (QA) TRAINING MANUAL

May 2023

Table of Contents

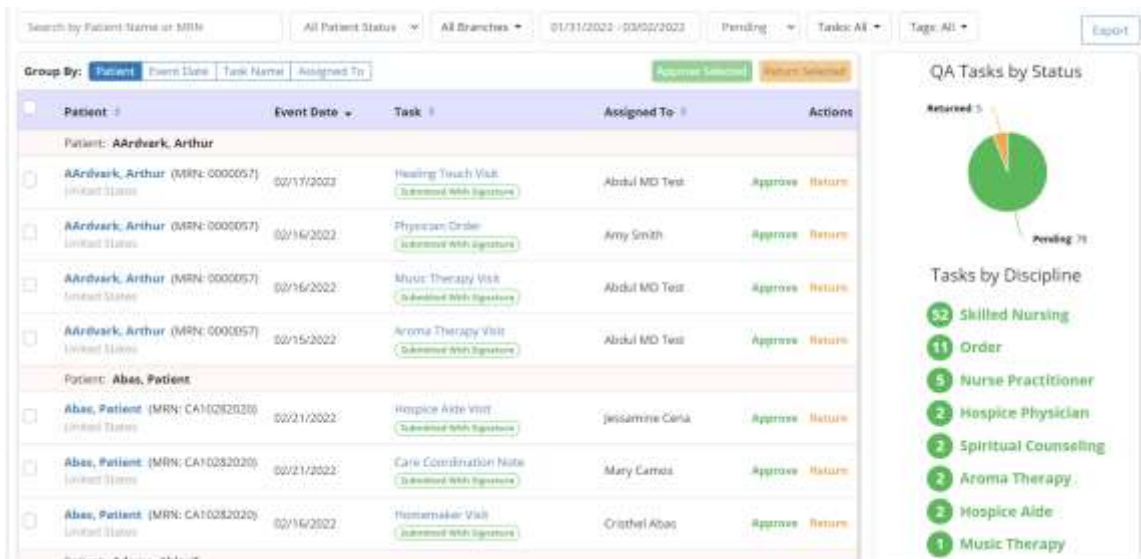
QUALITY ASSURANCE (QA) CENTER OVERVIEW.....	3
QA CENTER NAVIGATION.....	3
INFECTION REPORTS.....	5
QUALITY ASSURANCE PROCESS.....	6
BYPASS QUALITY ASSURANCE CENTER.....	7
UPDATING RETURNED TASKS.....	9
HELP CENTER.....	10

QUALITY ASSURANCE (QA) CENTER OVERVIEW

Home/QA Center

The QA Center is where clinical documentation gets processed. 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. At the top, there are search and filter options: 'Search by Patient Name or MRN', 'All Patient Status', 'All Branches', a date range '01/31/2022 - 03/02/2023', 'Pending' status, 'Tasks: All', 'Tags: All', and an 'Export' button. Below this is a 'Group By' section with options for 'Patient', 'Event Date', 'Task Name', and 'Assigned To'. The main area is a table of tasks with columns for Patient, Event Date, Task, Assigned To, and Actions. The tasks are grouped by patient: Arthur Aardvark and Abas Patient. To the right, there are two summary charts: 'QA Tasks by Status' showing 5 Returned and 7 Pending tasks, and 'Tasks by Discipline' showing counts for various roles like Skilled Nursing (32), Order (11), Nurse Practitioner (5), etc.

Patient	Event Date	Task	Assigned To	Actions
Patient: Aardvark, Arthur				
Aardvark, Arthur (MRN: 0000057)	02/17/2022	Healing Touch Visit	Abdul MD Test	Approve Return
Aardvark, Arthur (MRN: 0000057)	02/16/2022	Physician Order	Amy Smith	Approve Return
Aardvark, Arthur (MRN: 0000057)	02/16/2022	Music Therapy Visit	Abdul MD Test	Approve Return
Aardvark, 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 Coria	Approve Return
Abas, Patient (MRN: CA10282020)	02/21/2022	Care Coordination Note	Mary Camda	Approve Return
Abas, Patient (MRN: CA10282020)	02/16/2022	Restroom/Vol Visit	Cristhel Abas	Approve Return

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.



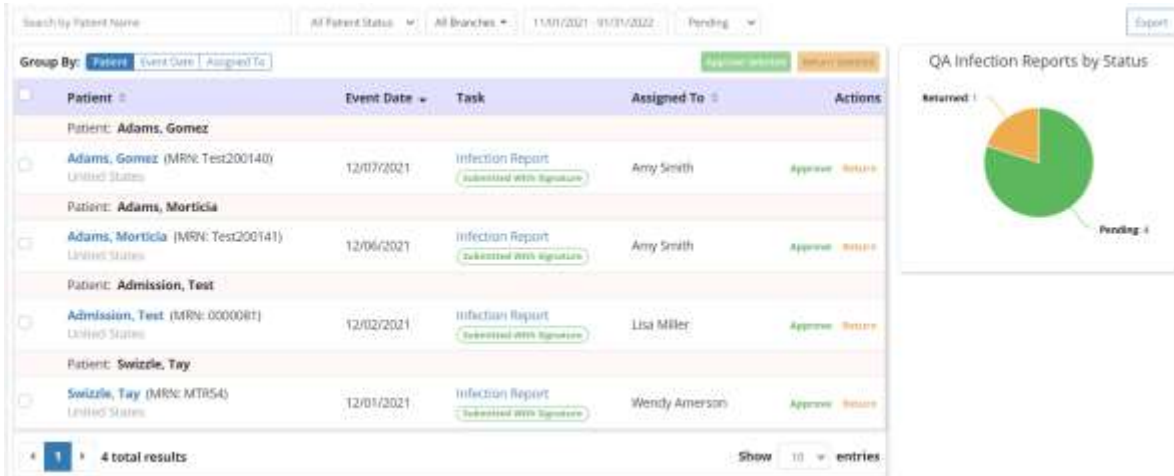
- Search - Enables users to search for a specific Patient Name or MRN.
- Patient Status - Filter by active, discharged, pending, non-admitted or deceased. The default is all.
- Branches - Filters by branch (if more than one).
- Date Range - Filters for specific task event dates, either write in or select 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 down 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, each with 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.

Patient	Event Date	Task	Assigned To	Actions
Patient: Adams, Gomez				
Adams, Gomez (MRN: Test200140) United States	12/07/2021	Infection Report <small>Submitted with Signature</small>	Amy Smith	Approve Return
Patient: Adams, Morticia				
Adams, Morticia (MRN: Test200141) United States	12/06/2021	Infection Report <small>Submitted with Signature</small>	Amy Smith	Approve Return
Patient: Admission, Test				
Admission, Test (MRN: 0000081) United States	12/02/2021	Infection Report <small>Submitted with Signature</small>	Lisa Miller	Approve Return
Patient: Swizzle, Tay				
Swizzle, Tay (MRN: MTR54) United States	12/01/2021	Infection Report <small>Submitted with Signature</small>	Wendy Amerson	Approve Return

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.



The screenshot shows the 'Infection Reports' interface with filters for Patient Name, Patient Status (All Patient Status), Locations (All Locations), Date Range (04/21/2020 - 05/21/202), and Status (Returned). The table below shows one report for 'Aaksojka, Keenan' with the 'Message User' action highlighted in a red box.

Patient	Event Date	Task	Assigned To	Actions
Patient: Aaksojka, Keenan				
Aaksojka, Keenan (MRN: 2333233) United States	05/11/2020	Infection Report <small>Returned for Review</small>	Jean Zachariah	Message User

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.

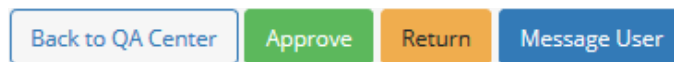


Patient: **Accord, Chunkmunk**


Accord, Chunkmunk (MRN: **Accord0150**) 10/16/2020 **Hospice Aide Visit** Christopher CJ **Approve** **Return**

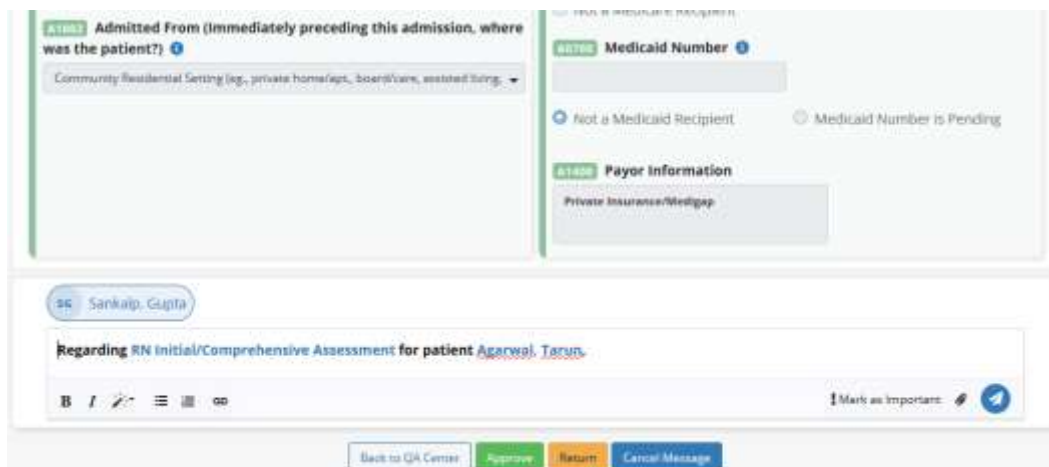
United States Submitted With Signature

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.



Admitted From (Immediately preceding this admission, where was the patient?)
Community Residential Setting (eg., private home/apt., board/care, assisted living)

Medicaid Number
 Not a Medicaid Recipient Medicaid Number is Pending

Payor Information
Private Insurance/Medigap

Sankalp, Gupta

Regarding **RN Initial/Comprehensive Assessment** for patient **Agarwal, Tarun**

Back to QA Center **Approve** **Return** **Cancel Message**

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 is available, along with the number of tasks selected.



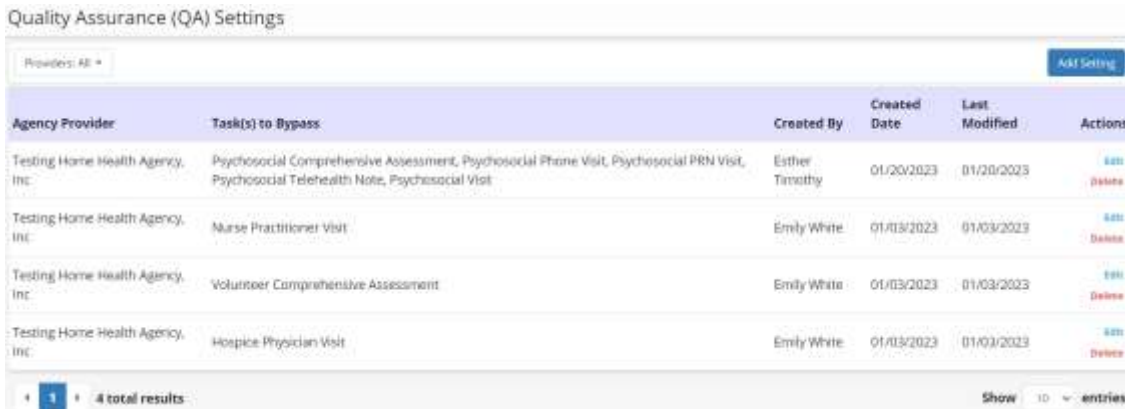
The screenshot shows a task management interface. At the top, there are filters for 'Group By' (Patient, Event Date, Task Name, Assigned To) and two buttons: 'Approve Selected 0' and 'Return Selected 0'. A red box highlights these buttons, with a '2' next to it. Below the filters is a table with columns: Patient, Event Date, Task, Assigned To, and Actions. The table contains three rows of tasks. The first two rows are for 'Accord, Chunkmunk' and the third is for 'Agarwal, Tarun'. Each row has a checkbox in the left margin, which is highlighted with a red box and a '1' next to it. The 'Actions' column for each row contains 'Approve' and 'Return' buttons.

BYPASS QUALITY ASSURANCE CENTER

By Task

Admin/QA Settings

To set tasks that should bypass the QA Center for multiple users, navigate to the **Admin** tab and select **Quality Assurance (QA) Settings** (permissions based). On the Quality Assurance Settings screen, select the **Add Setting** button.



The screenshot shows the 'Quality Assurance (QA) Settings' screen. At the top, there is a dropdown menu for 'Providers: All' and an 'Add Setting' button. Below this is a table with columns: Agency Provider, Task(s) to Bypass, Created By, Created Date, Last Modified, and Actions. The table contains four rows of settings. The 'Actions' column for each row contains 'Edit' and 'Delete' buttons. At the bottom, there is a pagination bar showing '1' and '4 total results', and a 'Show 10 entries' button.

In the **Add QA Setting** window, select the appropriate providers from the drop-down menu. Select specific disciplines to bypass the QA Center or click **Select All** if all disciplines for the selected users should bypass the QA Center. Once a discipline is selected, all related tasks will automatically be selected. If any of the selected tasks should not bypass the QA Center, click the respective boxes to

deselect the tasks. Once the desired selections have been made, select **Save Setting**.

Add QA Setting

Associated Providers *

Select Providers

Select tasks below to bypass the QA Center. Any selected task will bypass QA when performed by a user.

Select All
 Medical Social Work:
 Skilled Nursing:
 Order:

Physician:
 Physician Assistant:
 Nurse Practitioner:
 Spiritual Counseling:

Hospice Physician Face-to-Face Visit
 Hospice Physician Telehealth Face-to-Face Visit
 Hospice Physician Visit

Multidisciplinary:
 Therapy Services:
 Volunteer:
 Hospice Aide/Homemaker:

By User

To select tasks that should bypass the QA Center for an individual user, navigate to the **QA Settings** tab in the user's profile (permissions based). Under **Bypass QA Center**, select specific disciplines to bypass the QA Center or click **Select All** if all disciplines for the user should bypass the QA Center. Once a discipline is selected, all related tasks will automatically be selected. If any of the selected tasks should not bypass the QA Center, click the respective boxes to deselect the tasks. Once the desired selections have been made, select **Save Setting**. When a user completes a task that is set to bypass the QA Center, the task will appear in the patient chart with a **Completed** status.

Quality Assurance (QA) Settings

Bypass QA Center

Select tasks below to bypass the QA Center. Any selected task will bypass QA when performed by a user.

Select All
 Medical Social Work:
 Skilled Nursing:
 Order:

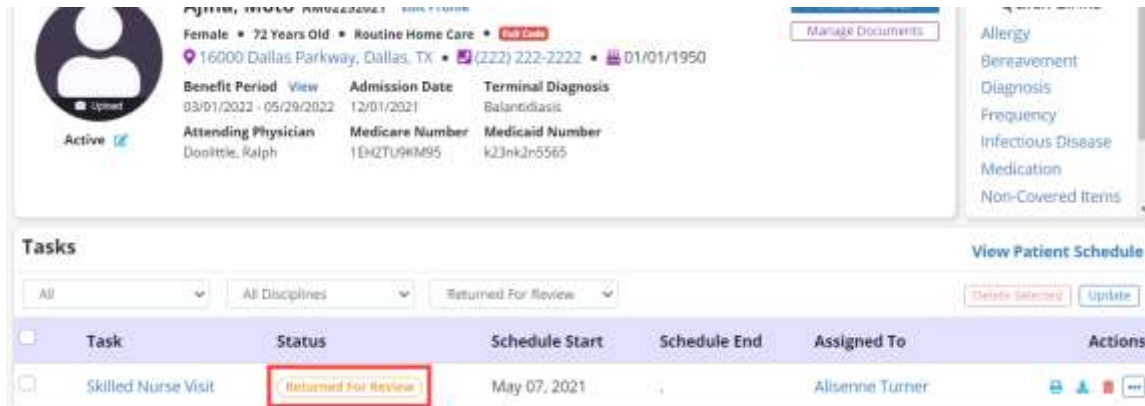
Psychosocial Comprehensive Assessment
 Psychosocial Phone Visit
 Psychosocial PRN Visit
 Psychosocial Telehealth Note
 Psychosocial Visit

Physician:
 Physician Assistant:
 Nurse Practitioner:
 Spiritual Counseling:

Multidisciplinary:
 Therapy Services:
 Volunteer:
 Hospice Aide/Homemaker:

UPDATING RETURNED TASKS

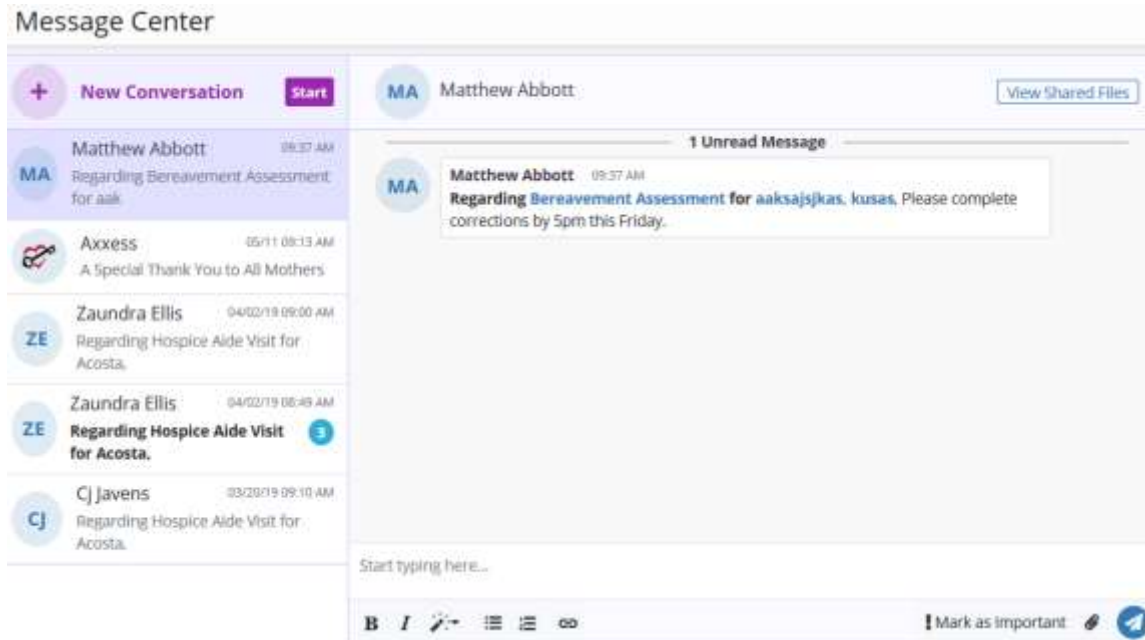
If a document is returned, the clinician will be able to update and resubmit directly from the patient chart screen or schedule center. Tasks listed as “Returned For Review” in orange are ready for the clinician to make edits.



The screenshot shows a patient profile for a 72-year-old female. Below the profile, there is a 'Tasks' section with a table of tasks. One task, 'Skilled Nurse Visit', is highlighted with an orange background and the status 'Returned For Review'.

Task	Status	Schedule Start	Schedule End	Assigned To	Actions
Skilled Nurse Visit	Returned For Review	May 07, 2021		Alisenne Turner	[Icons]

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.



The screenshot shows a 'Message Center' interface. On the left is a list of messages, and on the right is the content of a selected message from Matthew Abbott. The message text reads: 'Regarding Bereavement Assessment for aaksajsjkas, kusas, Please complete corrections by 5pm this Friday.'

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. To access the Help Center, navigate to the **Help** tab and select **Help Center** or go to <https://www.axxess.com/help/>.

