

HOME CARE QUALITY ASSURANCE (QA) QUICK REFERENCE GUIDE

February 2022


Table of Contents

QUALITY ASSURANCE (QA) PROCESS	3
STICKY NOTE TYPES	3
UPDATING RETURNED TASKS.....	4
HELP CENTER.....	5

QUALITY ASSURANCE (QA) PROCESS

Home/Quality Assurance (QA) Center

When a clinician completes documentation, the task will appear in the QA Center to be reviewed by the QA nurse or DON:

1. Choose branch (if more than one), client status, date range, tag type and/or tags.
2. Group by client, date, task or clinician.
3. Start typing to search by client, date, task, status or assigned to.
4. Select the **Task** name hyperlink, the PDF version populates and there are six buttons available:
 - a. **View Plan of Care** - Option to see the plan of care when applicable to a specific task.
 - b. **Edit** - Enables the QA nurse to edit task documentation. This option should only be used if the QA nurse is the same clinician completing the documentation.
 - c. **Approve** - Processes the documentation to completed status.
 - d. **Return** - This returns the documentation back to the clinician for requested updates. If returning documentation, the QA nurse should clarify why the document is being returned. The clinician will then be notified on their dashboard alerts and a  will appear in the notes column.
 - e. **Download** - Will ask where the user would like to save the PDF on the computer.
 - f. **Print** - Enables the user to print the documentation.
 - g. **Close** - Closes the window.

NOTE: Organizations may elect to bypass this process for specific clinicians by selecting 'Bypass QA Center' in user permissions.

To approve multiple tasks:

1. Select the checkboxes to the left.
2. Select **Approve Selected**.

STICKY NOTE TYPES

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

- Orange - Notes related to a task that has been returned for review.

- *Clients/Client Center/Menu/Details/View Comments*
- Blue - Notes related to the entire care period.
 - *Schedule/Schedule Center/Care Period/List Care Periods/Edit*
- Yellow - Notes related to a specific task.
 - *Clients/Client Center/Menu/Details*
- Red - Notes a missed visit.
 - *Clients/Client Center/Menu/Missed Visit Form*

UPDATING RETURNED TASKS

Clients/Client Center

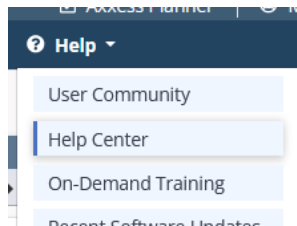
Clinicians can update and resubmit any returned task directly from the client chart, schedule center or mobile device:

1. Search for the client in the left side pane.
2. Select a client.
3. Select the **Task** hyperlink to reopen document.
4. Select **View Comments**.
5. Make updates.
6. Complete and re-sign the task.
7. The task goes back to QA for approval.

HELP CENTER

Help/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 of all of Axxess' products. It can be accessed by going to:



Or also available at <https://www.axxess.com/help/>

