HOSPICE QUALITY ASSURANCE (QA) TRAINING MANUAL

<u>May 2023</u>

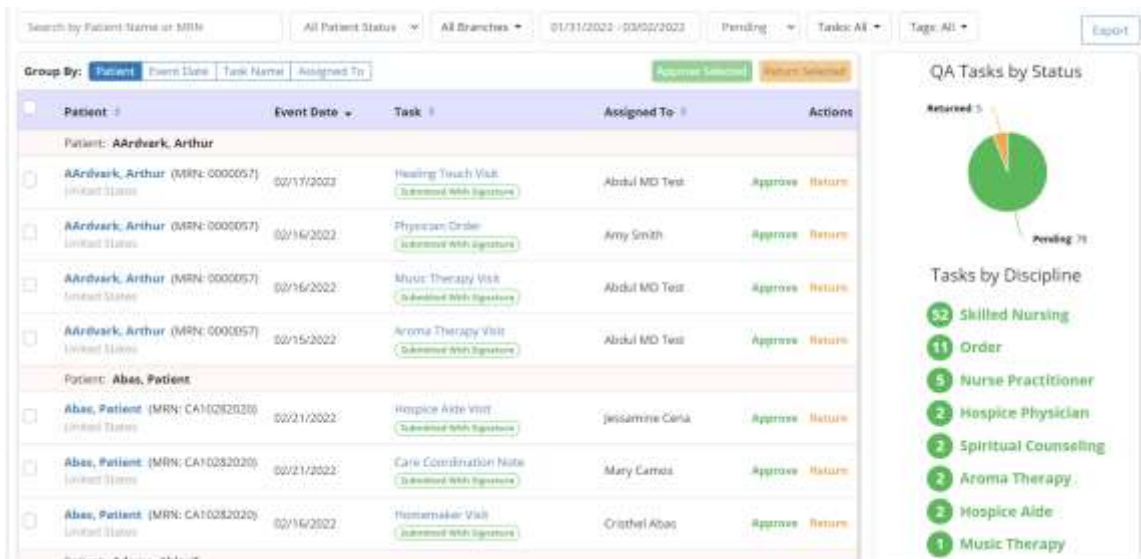## Table of Contents

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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**.

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.
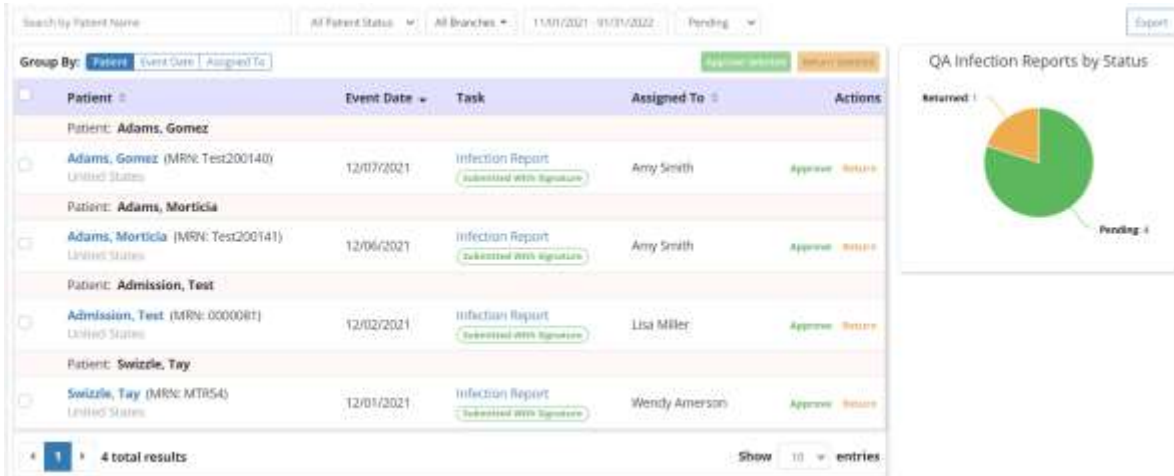

- Search - Enables users to search for a specific Patient Name or MRN.
- Patient Status - Filter by active, discharged, pending, non-admitted or deceased. The default is all.
- Branches - Filters by branch (if more than one).
- Date Range - Filters for specific task event dates, either write in or select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

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.

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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.
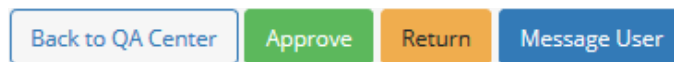

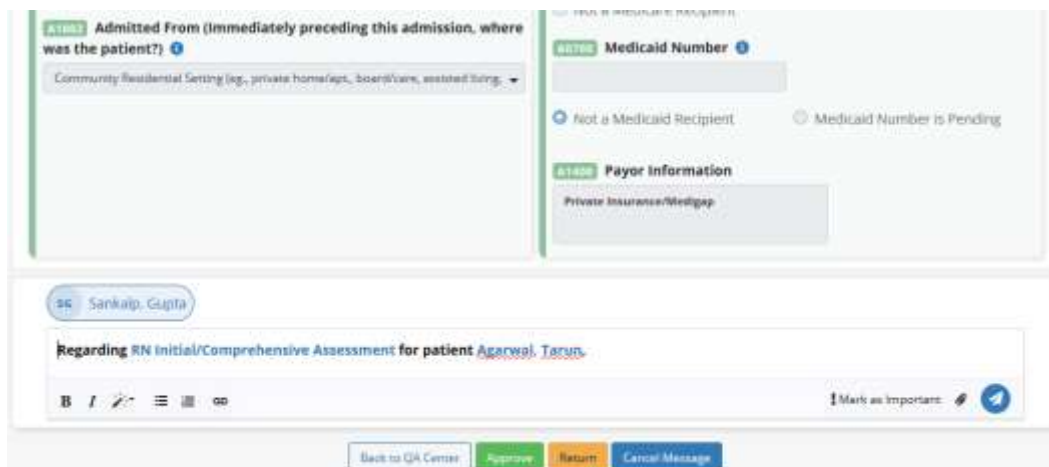By selecting the task name, a preview version will load where users can approve or return a task at the bottom of the page.

- <u>Back to QA Center</u> – Returns the user to the QA Center.
- <u>Approve</u> - Processes the documentation to a Completed status.
- <u>Return</u> - 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.
- <u>Message User</u> – 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.

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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.
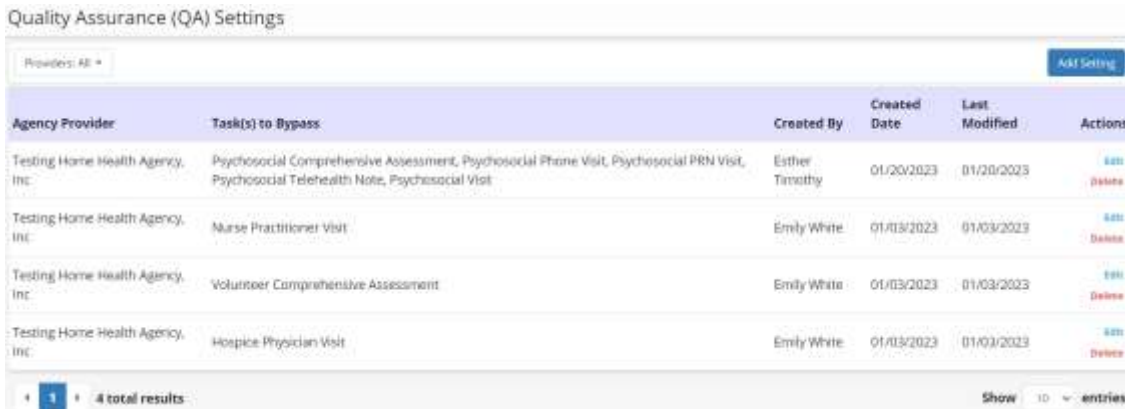

BYPASS QUALITY ASSURANCE CENTER
By Task
Admin/QA Settings

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.

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.**

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.

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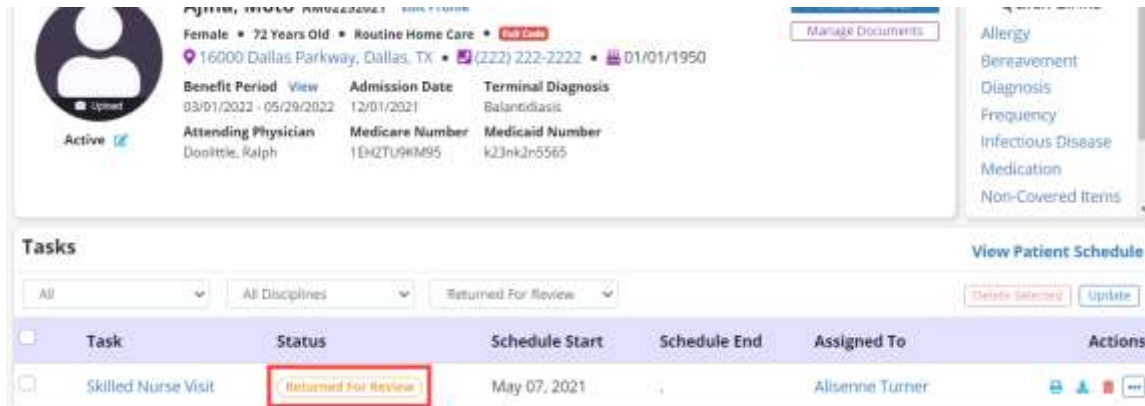
UPDATING RETURNED TASKS

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.

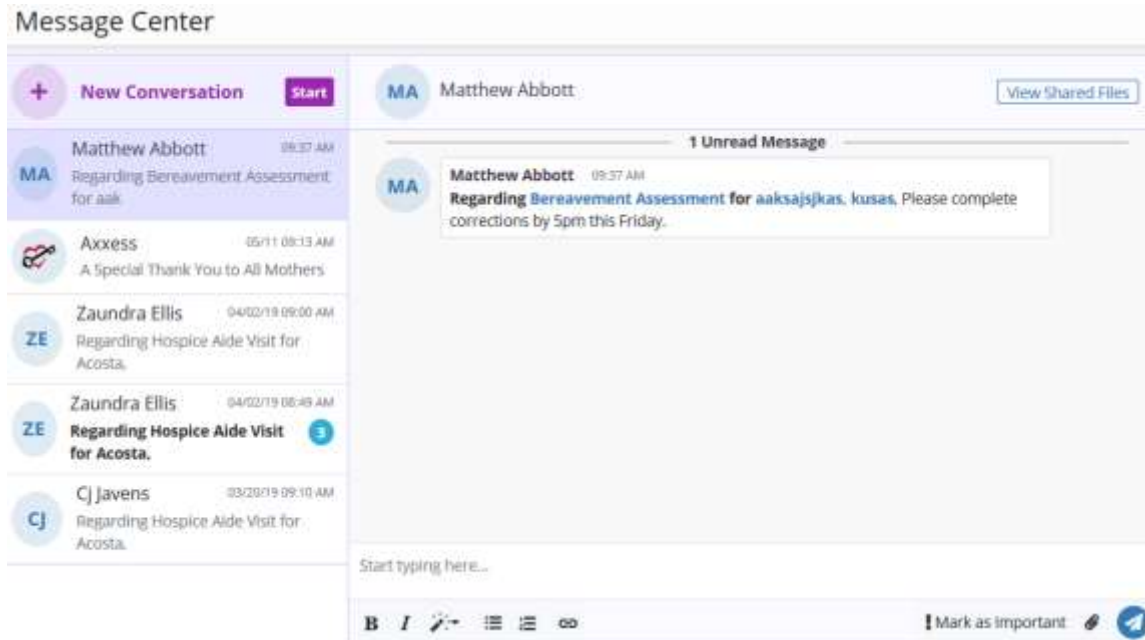Selecting the task will reopen the document for editing by the clinician. The clinician can view the comments regarding the document in the Message Center and reply/respond back about the editing request.

There is a direct hyperlink to the returned visit or patient chart to make edits and/or review.

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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/.

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Revenue Cycle

Patient Engagement

Staffing

Training and Certification