# Home Health Care
# QA Review Guide

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# QA Process Overview

## QA Review Process

### Agency Set Up

Agency sets up assessments that require QA and QA roles in use at the agency. Clinical QA and Coder roles are available. See Appendix for setup.

### QA Process

**1. Clinician signs assessment.**

If the assessment requires QA, it is displayed on the **Pending QA Review** dashboard.

**2. Clinical QA and Coder access assessment from Pending QA Review dashboard and review assessment.**

**If changes are not required:**

- Clinical QA selects **QA Complete - No Changes Required**.
- Coder selects **QA Complete - No Changes Required.**
- **Assessment is complete.**

**If changes are required:**

- **Clinical QA** indicates changes are required and selects **QA Complete - Changes Required.**
- **Coder** enters diagnosis in Oasis assessment under diagnosis section and selects **QA Complete - Changes Required.**
- Assessment is labeled **QA Requests Changes** in chart and appears on the clinician's clinical app under to-do list section **QA Review Complete.**
- **Clinician completes changes, and signs document**. In the case of diagnosis changes from the coder, clinician enters severity ratings.
- **Assessment returns to the Pending QA Review dashboard for QA and Coder review.**

**3. Assessment is processed.**

Plan of Care and OASIS file are generated. Chart is updated with any changes (orders, care plan, meds).

# QA Dashboards and Reports

Home Health Care offers a number of dashboards and reports to help agencies manage the QA Process.

**Tips:**

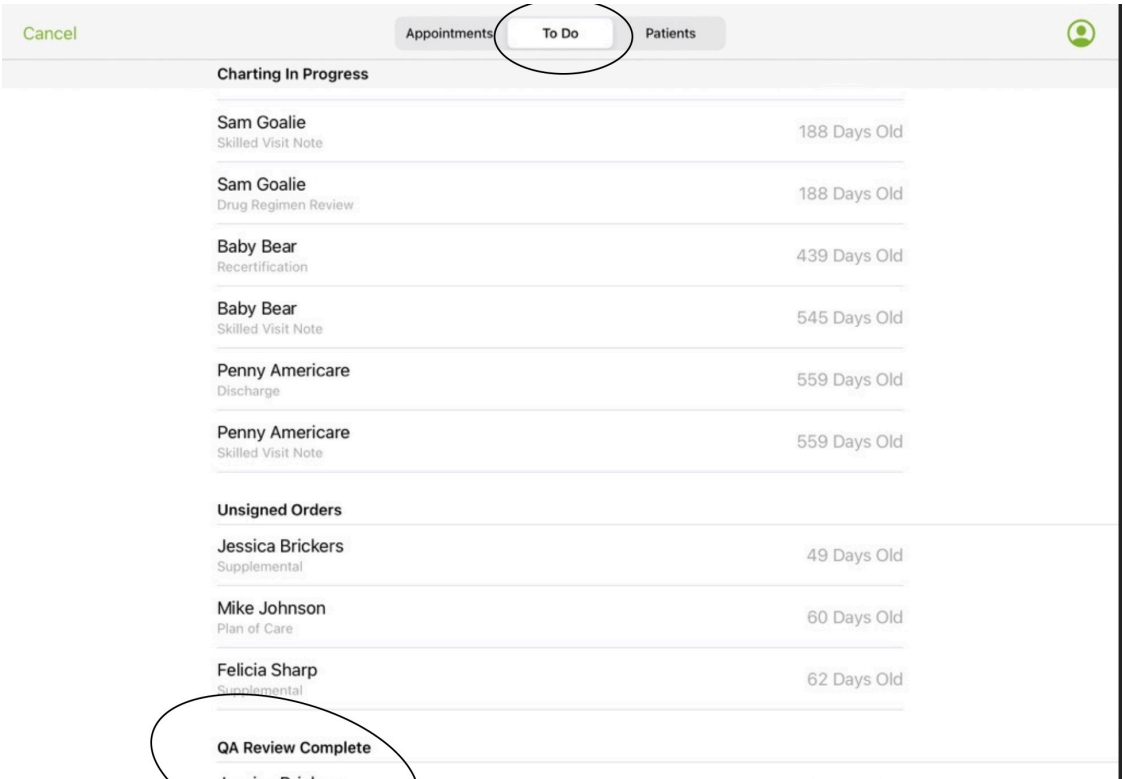
- Reports and dashboards must be enabled and set up for user roles by your system admin.
- To add a dashboard tile to your dashboard page, click **Add Widget**.

## Dashboards

### Pending QA

Lists assessments that are ready for QA. Used by Clinical QA staff and Coders.

In the Clinical app, QA docs come back to the clinician for review/edits in the To-Do List under QA Review Complete category



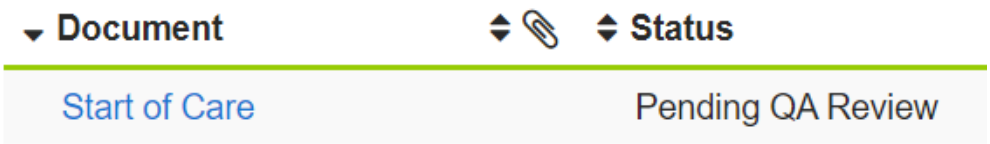
## Reports

**QA Requests Changes report**

Lists all items that currently have changes requested by QA. The report can be run by agency or branch. All columns are sortable. This report is useful for agency directors and management who want to monitor QA review timeliness.

# Assessment QA Process

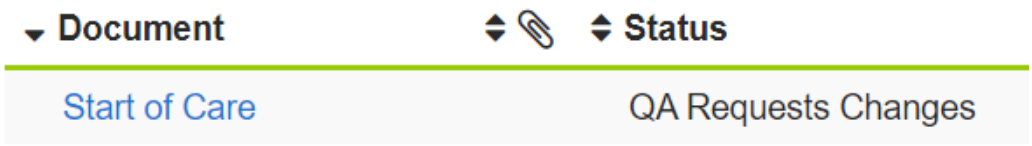
1. User (Author) signs an Assessment Requiring QA.
   - Displays in the charting tab with status of **Pending QA Review.**




   - Assessment appears on the **Pending QA Review** dashboard.

2. **Clinical/Coder QA reviews assessment**
   a. **Clinical QA** reviews the assessment and provides feedback at each question level. Clinician is responsible to make edits via the clinical app.
   b. **Coder QA** reviews the assessment, updates the diagnosis list on the assessment, and provides feedback on the assessment.
   c. Select the **QA Complete – Changes Required.**

d. Charting tab is updated with status of **QA Requests Changes.**




e. If no changes are required, then select QA Complete – No Changes Required. The assessment is processed (the Plan of Care and OASIS file are generated, and the chart is updated with any changes (orders, care plan, meds)).
**Note:** Both the Clinical and Coder QA need to approve an assessment before it is considered complete.

3. **User (Author) Updates Assessment**

a. Author updates/edits the assessment with the changes indicated in the feedback section of each question.

b. Assessment is signed

c. **Return to Step 2**

# Appendix- QA Setup

## Setting up Security Roles/Users

QA Review Workflow Roles/Users

| Role | Function |
|---|---|
| QA Review Clinical | Identified user who is reviewing the assessment for clinical answers/documentation |
| QA Review Coder | Identified user who is reviewing the assessment for appropriate diagnosis coding |
| Administrator and Assessment Administrators | These users have the ability to complete the QA Review<br>▪ If a person with the admin roles does QA first, it will be considered the QA Reviewer – Clinical person<br>▪ If a person with the admin roles does QA after the first review is done, it will be considered the QA Reviewer – Coder person |

## Assign Security Roles to Users

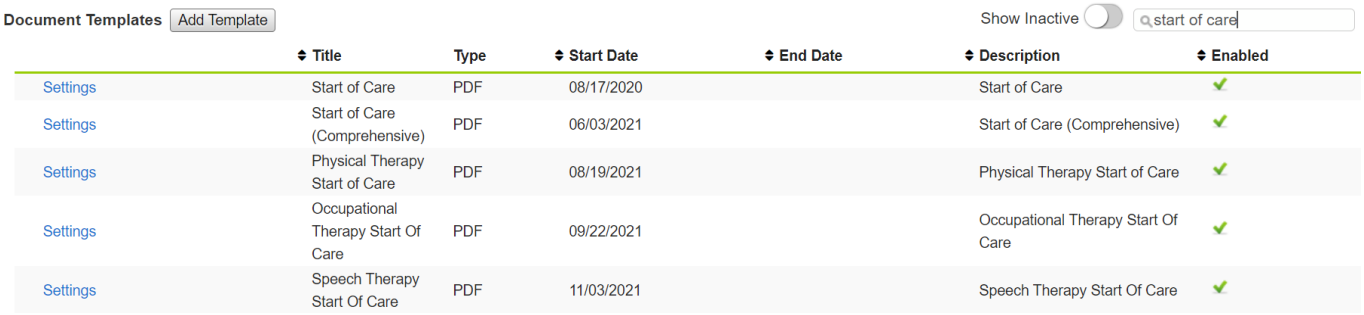
1. From Web portal, select **Setup.**
2. Select **Security Users.**
3. Find user to add the desired roles and select **Edit.**
4. From **Roles Assigned**, select the roles to add.
5. Select **Save.**
6. Repeat for all users who require the QA Review roles.

# QA Review Document Template Setup

Agencies must determine which document types require QA Review and set up the roles that should QA review them.

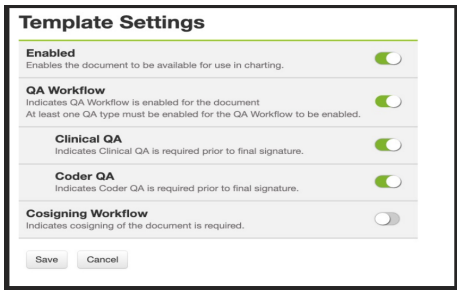
**Procedure**

1. Select **Administration > Templates.**
2. Find document template that requires QA Review.
3. Select **Settings.**




| | Title | Type | Start Date | End Date | Description | Enabled |
|---|---|---|---|---|---|---|
| Settings | Start of Care | PDF | 08/17/2020 | | Start of Care | ✓ |
| Settings | Start of Care (Comprehensive) | PDF | 06/03/2021 | | Start of Care (Comprehensive) | ✓ |
| Settings | Physical Therapy Start of Care | PDF | 08/19/2021 | | Physical Therapy Start of Care | ✓ |
| Settings | Occupational Therapy Start Of Care | PDF | 09/22/2021 | | Occupational Therapy Start Of Care | ✓ |
| Settings | Speech Therapy Start Of Care | PDF | 11/03/2021 | | Speech Therapy Start Of Care | ✓ |

4. Select **QA Review.**
5. Both Clinical and Coder will be selected. If only one review is needed, deselect the role not required.




6. Click **Save.**

**Tip:** If your agency has only one person doing the Clinical and Coder review, we recommend you select only QA Review – Clinical.

## QA Dashboard Setup

- For **QA Pending Review** dashboard, select **QA Reviewer Clinical** and/or **QA Reviewer Coder** role(s)**.**

To set roles for dashboards:

1. Select **Administration > Dashboards.**
2. Find dashboard to edit.
3. Select **Edit.**
4. Select **Roles** that need to have access to the dashboard.
5. Select **Accept.**