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Empowering Exceptional Care

Back Office-General Quick Reference Guide

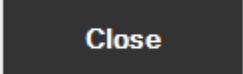Clinical Supervisor for Home Health

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Perform Clinical Supervisor Tasks-Part 1

Clinical Supervisor tasks are created in HCHB Back Office for new orders and order changes that directly affect a patient's care plan. These tasks are crucial to the Clinical Supervisor's goal of maintaining exemplary care and creating appropriate care plans for all patients.

Note: The task names and assignments may vary depending on your agency's settings.

Common Buttons & Icons

Button	Description
Visit Note	**Visit Note** button
Print Visit Note	**Print Visit Note** button
Verify/Enter Inpatient Facility	**View/Enter Inpatient Facility** button
Add Other Facility +	**Add Other Facility** button
Save & Close 💾	**Save & Close** button
Close	**Close** button
Add Inpatient Event +	**Add Inpatient Event** button
View Synopsis Compare Report	**View Synopsis Compare Report** button
Stage Completed	**Stage Completed** button
Approve Order for ROC Visit	**Approve Order for ROC Visit** button
OASIS Assessment Therapy Report	**OASIS Assessment Therapy Report** button
Episode Summary Report	**Episode Summary Report** button
Edit/Accept DC Order	**Edit/Accept DC Order** button
Edit/View Discharge Info	**Edit/View Discharge Info** button

Transfer to Inpatient Facility

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **TRANSFER TO INPATIENT FACILITY**. The Review Transfer to Inpatient Facility Assessment Data window displays.
2. Click **Visit Note**.
3. Click the visit note you want to view.

   Note: The visit note can be viewed in tab form by clicking View Visit Note or in report form by clicking Print Visit Note.

4. Click **Print Visit Note**.
5. Review the report; then click the **Close** button. You return to the Visit Notes window.
6. Click **Close**.
7. Click **Verify/Enter Inpatient Facility**. The referral opens to the Clinical tab.
8. Click **Add Other Facility**.
9. Enter the facility information.

   Note: The only required information for a facility is the type and name. It is not required to enter the facility's address or contact information.

10. Click **Save & Close**.
11. Click **Add Inpatient Event**.
12. Enter the inpatient event information.

    Note: The only required field is Inpatient Facility. Enter the Admit Date and Reason for Admission if known.

13. Click **Save & Close**.
14. Click **Save & Close**. You return to the task window.
15. Click **View Synopsis Compare Report**.

    Note: This report compares answers from the Start of Care OASIS assessment with the answers from the most recent OASIS assessment.

16. Review the report; then click the **Close** button.
17. Click **Stage Completed**.

Review and Approve Order for ROC Visit

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **REVIEW AND APPROVE ORDER FOR ROC VISIT**.
2. Click **Review ROC Visit Order**.
3. Review the order; then click the **Close** button.

   Note: After reviewing the order, you have the options to approve, edit, or decline the order, or discharge and readmit the patient. Ensure that a ROC visit is plotted on the calendar prior to approving the order.

4. To approve the ROC order, click **Approve Order for ROC Visit**.
5. Click **OK**. The order for ROC Visit is approved and the task is removed from your list.

Review ROC Evaluation Documentation

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **REVIEW ROC EVALUATION DOCUMENTATION**.
2. Review the Visit Note and ROC Order to determine what care is necessary for the patient.
3. Edit Diagnoses, Procedures, and Vital Sign Parameters as needed.
4. Click **OASIS Assessment Therapy Report**.

   Note: The OASIS Assessment Therapy Report evaluates the ROC OASIS answers and uses a point system to indicate whether the patient would benefit from a Therapy Evaluation.

5. Review the report; then click the **Close** button.
6. After reviewing the documentation and making necessary changes, click **Stage Completed**.

Review Discharge Order

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **REVIEW DISCHARGE ORDER**.
2. Click **Review DC Order**.
3. Review the discharge order; then click the **Close** button.
4. Click **Episode Summary Report**.
5. Review the report; then click the **Close** button.

   Note: You can choose to void the order if it was decided to continue providing services after the discharge order was created.

6. Click **Edit/Accept DC Order**.

   Note: The Edit Patient Order window displays the discharge order in an editable format. The order description may be updated and content reasons added, if applicable. If necessary, ensure that a Discharge visit is plotted for the patient.

7. Edit the order if needed.
8. Click **Save & Close.**

   Note: You return to the Workflow Console and the task is removed.

Review Discharge Assessment Data

Note: After a discharge order is approved and the discharge assessment is completed by the clinician, a Review Assessment Data task is created for the Clinical Supervisor.

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **REVIEW ASSESSMENT DATA**.
2. Click **Visit Note**.
3. Click the visit note you want to review.
4. Click **Print Visit Note**.
5. Review the visit note; then click the **Close** button.
6. Click **Close**.
7. Click **View Synopsis Compare Report**.
8. Review the report; then click the **Close** button.
9. Click **Edit/View Discharge Info**.

   Note: Information outlining the Discharge Status, Reason for Discharge, patient's condition at discharge, and the day the discharge is effective displays here. These fields can be edited as necessary.

10. Click **Save & Close**.

    Note: You can make edits to the patient's Claim Codes or Inpatient Facility information within the referral through Clinical Input as needed, but it is not required.

11. Click **Stage Completed**.

Make a Recert/DC Decision

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **RECERT/DC DECISION**.

   Note: At the top of the task window, information displays regarding if the F2F encounter is required and whether or not it is completed. Review as many reports as necessary to assist you in making a decision.
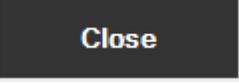
   - The **Review Episode Summary Report** gives a synopsis of what happened during the patient's episode including disciplines and services provided and their outcomes as well as percentage of goals met.
   - The **Review Episode Detail Report** provides the same information as the Summary Report but also includes each distinct outcome with its corresponding goal and whether or not the goal was met and a description of how it was met or why it was not met.

- The **Management and Evaluation Report** alerts you of whether a particular management and evaluation service is likely, recommended, or required and is organized by OASIS questions.
- The **View Claims Audit Report** gives basic information about what is outstanding for the patient including any scheduled visits that were not verified, unsigned order, and if the face-to-face documentation is complete or not.
- The **View Visits to Orders Comparison Report** shows a summary of orders that affect the patient's calendar and details about each visit including the reason for any missed visits.
- The **Therapy Reassessment Tracking Report** contains information about the patient's therapy reassessment.

2. To discharge the patient, click **DC**.

   Note: When you click DC, a new task is generated to approve and complete the discharge process.

3. To recertify the patient, click **Recert**.

   Note: When you click Recert, a new Pending episode is created for the patient and new tasks are generated in association with the recertification process.

4. Click **Yes**.

   Note: The system generates a coordination note that will be attached to the new episode so that the entire staff can review why this patient was recertified for services.

5. Enter the note type and details.
6. Click **Save & Close**.

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Perform Clinical Supervisor Tasks-Part 2

Clinical Supervisor tasks are created in HCHB Back Office for items that change the patient's plan of care such as a new aide care plan, order changes, and new supply requisitions. These tasks are crucial to the Clinical Supervisor's goal of maintaining exemplary care and creating appropriate care plans for all patients.

Common Buttons & Icons

Button/Icon	Description
Review Aide Care Plan Report	**Review Aide Care Plan Report** button
View/Edit Aide Care Plan	**View/Edit Aide Care Plan** button
Replace Pending Care Plan with Proposed Care Plan	**Replace Pending Care Plan with Proposed Care Plan** button
Approve Pending Care Plan	**Approve Pending Care Plan** button
Stage Completed	**Stage Completed** button
Review Order	**Review Order** button
Approve Order	**Approve Order** button
View Supply Requisition Report	**View Supply Requisition Report** button
Edit/View Supply Requisition	**Edit/View Supply Requisition** button
Edit Requisition Detail	**Edit Requisition Detail** button
Add Requisition Detail +	**Add Requisition Detail** button
Save & Close	**Save & Close** button
(magnifying glass)	**Magnifying Glass** icon
Select	**Select** button
Close	**Close** button
Delete Requisition Detail	**Delete Requisition Detail** button
Approve Supply Requisition	**Approve Supply Requisition** button

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Review, Edit, and Approve Aide Care Plans

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **REVIEW/EDIT/APPROVE AIDE CARE PLAN**.

   Note: This task generates when a change has been made to the patient's Aide Care Plan.

2. Click **Review Aide Care Plan Report**.
3. Review the report; then click the **Close** button.
4. Click **View/Edit Aide Care Plan**.
5. Click **Replace Pending Care Plan with Proposed Care Plan** to accept the new care plan services as the clinician suggested.

   Note: If you want to keep the current care plan without accepting any of the changes in the proposed care plan, use the Decline Pending Care Plan button.

6. Click **Approve Pending Care Plan**.
7. Click **Stage Completed**.

Review and Approve a New Order

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **REVIEW AND APPROVE NEW ORDER**.
2. Click **Review Order**.
3. Review the entire order; then click the **Close** button.
4. Edit the order if necessary.
5. Click **Approve Order**.
6. Click **Yes**.

Review Supply Requisitions

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **REVIEW/EDIT/APPROVE SUPPLY REQUISITION**.
2. Click **View Supply Requisition Report**.

   Note: You can print the Supply Requisition Report from this window using the printer icon in the top grey toolbar if needed.

3. Review the report; then click the **Close** button.
4. Click **Edit/View Supply Requisition**.

   Note: Here, you can edit the delivery information or supply requisition details. You cannot edit the supply vendor information.

5. To change the quantity of supplies, click the supply you want to edit.

6. Click **Edit Requisition Detail**.
7. Click the arrows to change the quantity.
8. Click **Save & Close**.
9. To add a new supply, click **Add Requisition Detail**.
10. Click the **Magnifying Glass** icon in the Supply Package field. The Supply Requisition Lookup window displays.
11. Enter all or part of the supply name in the Search For field; then click **the Magnifying Glass** icon.
12. Click the appropriate supply package.
13. Click **Select**.
14. Enter the appropriate number in the **Quantity** field.
15. Click **Save & Close**.
16. To remove the supply package, click the item.
17. Click **Delete Requisition Detail**.
18. Click **Yes**.
19. Click **Save & Close**.
20. Click **Approve Supply Requisition**.
21. Click **Yes**.

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