

CubHub Clinical

Quality Assurance

Quality Assurance: Overview

Clinical> Quality Assurance

Advanced Filter Options

Filter page using the advanced filter options.

Select one or multiple assignments to see **Preview** & **Approve** Options.

Approve: User may select multiple visits & approve with or w/o signature all at one time

Preview: User may select one or multiple visits to review each PDF and then approve or decline the assignments individually

Action Ellipsis Options

Add Note

Patient Chart

View PDF

QA Assignments								
Search								
1-17 of 17								
<input type="checkbox"/>	Date ↑↓	Patient Name	Form	Clinician (Signee)	Care Manager	Status	Last Note	Alerts
<input type="checkbox"/>	09/14/2021	Magee, Lucy	Supervisory Visit	Lewis, Annie	,	Pending Corrections	09/14/2021 18:46:20 CDT	...
<input type="checkbox"/>	08/31/2021	Lasso, Ted	T2K PT Visit	Lewis, Annie	Lewis, Annie	Pending QA	09/01/2021 00:49:40 CDT	...
<input type="checkbox"/>	08/31/2021	Lasso, Ted	T2K PT Re-Evaluation	Lewis, Annie	Lewis, Annie	Pending Corrections	09/01/2021 16:31:46 CDT	...
<input type="checkbox"/>	08/31/2021	Magee, Lucy	Supervisory Visit	Lewis, Annie	,	Corrected (1)	09/14/2021 18:26:28 CDT	...
<input type="checkbox"/>	08/27/2021	Lasso, Ted	T2K PT Visit	Lewis, Annie	Lewis, Annie	Pending Corrections	09/01/2021 00:49:29 CDT	...
<input type="checkbox"/>	08/27/2021	Lasso, Ted	T2K SLP Re-Evaluation	Musgraves, Casey	Musgraves, Casey	Pending QA		...
<input type="checkbox"/>	10/26/2020	Durst, Nora	Occupational Therapy Re-Eval	Bruley, Judy	Hera, Casey	Pending Corrections	11/05/2020 14:33:46 CST	...

Quality Assurance: Advanced Filter Options

Click **filter icon** to open advanced filter options. ▼

Advanced Filter Options

Multi-Select Filters: Team, Care Manager, Patient, Clinician, Form & Service Type, Status

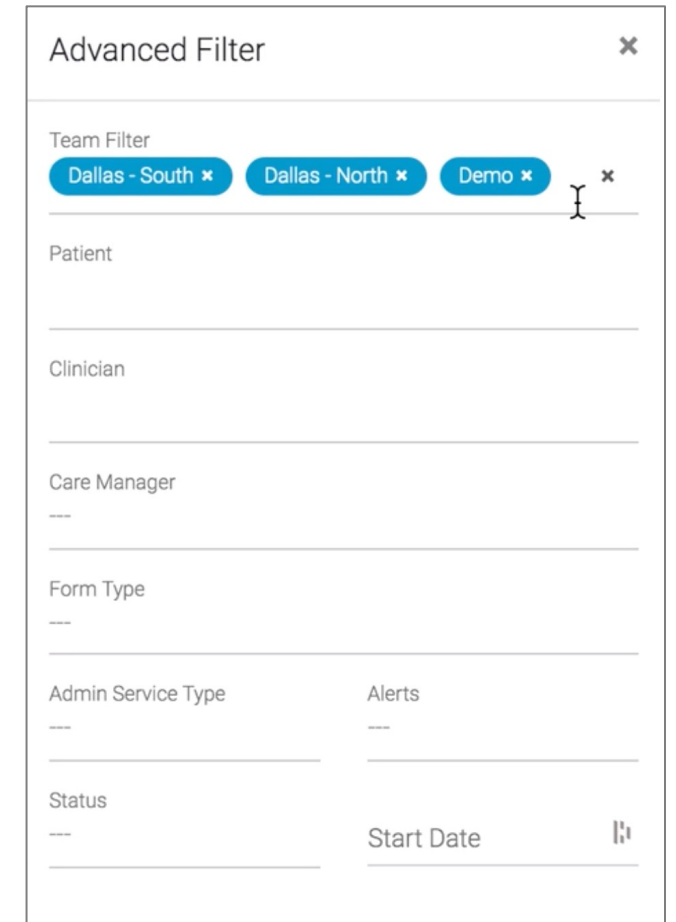
Alerts: page defaults to all; user may choose view only visits with (yes) or without (no) alerts; includes all visit alert types (Orders; Deviations, PCG & Flags)

Team: filter will default to my team(s)

Care Manager: will default to my patients, if I am a care manager

Form & Service Type: filter by available form and service types

Status: Corrected, Pending Corrections, Pending QA



The screenshot shows a modal window titled "Advanced Filter" with a close button (X) in the top right corner. The dialog contains several filter sections, each with a label and a text input field. The "Team Filter" section is active, showing three blue buttons with white text: "Dallas - South", "Dallas - North", and "Demo". Each button has a small "X" icon to its right. A cursor is positioned over the "Demo" button. Below the "Team Filter" section are input fields for "Patient", "Clinician", "Care Manager", "Form Type", "Admin Service Type", "Status", "Alerts", and "Start Date". The "Alerts" and "Start Date" fields are located in a separate column on the right side of the dialog.

Quality Assurance: Statuses

Pending QA: Original Visit has been submitted and is ready for review

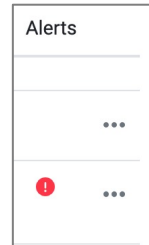
Pending Corrections: Original Visit has been sent back to the clinician to make corrections

Corrected (1): A previously pending corrections visit, has been corrected by the clinician and sent back to QA for review (1) This indicated how many times the original visit has been corrected. Clicking on this status will show an audit of what was changed from original to corrected

QA Assignments								
Search								
1-15 of 15								
<input type="checkbox"/>	Date	Patient Name	Form	Clinician (Signee)	Care Manager	Status	Last Note	Alerts
<input type="checkbox"/>	09/14/2021	Magee, Lucy	Supervisory Visit	Lewis, Annie	.	Pending QA	09/14/2021 18:46:20 CDT	...
<input type="checkbox"/>	08/31/2021	Lasso, Ted	T2K PT Re-Evaluation	Lewis, Annie	Lewis, Annie	Pending Corrections	09/01/2021 16:31:46 CDT	...
<input type="checkbox"/>	08/31/2021	Magee, Lucy	Supervisory Visit	Lewis, Annie	.	Corrected (1)	09/14/2021 18:26:28 CDT	...
<input type="checkbox"/>	08/27/2021	Lasso, Ted	T2K SLP Re-Evaluation	Musgraves, Casey	Musgraves, Casey	Pending QA		...
<input type="checkbox"/>	10/26/2020	Durst, Nora	Occupational Therapy Re-Eval	Bruley, Judy	Hera, Casey	Pending Corrections	11/05/2020 14:33:46 CST	...
<input type="checkbox"/>	10/21/2020	Durst, Nora	Occupational Therapy Re-Eval	Bruley, Judy	Hera, Casey	Pending QA	10/26/2020 23:44:55 CDT	...
<input type="checkbox"/>	10/01/2020	Tosh, Daniel	Physical Therapy Evaluation	Lewis, Annie	Lewis, Annie	Pending QA	12/20/2020 14:07:29 CST	...
<input type="checkbox"/>	07/29/2020	Carlton, Edie	Physical Therapy Re-Eval	Lewis, Annie	Lewis, Annie	Pending QA		...
<input type="checkbox"/>	02/20/2020	Harris, Remy	PDN Shift	Ilich, Bridget	Upchurch, Ann	Pending Corrections	03/02/2020 10:11:44 CST	1 ...
<input type="checkbox"/>	02/02/2020	Harris, Remy	PDN Shift	Upchurch, Ann	Upchurch, Ann	Pending QA		1 ...
<input type="checkbox"/>	02/01/2020	Calypso, Charlotte	PDN Shift	Upchurch, Ann	Not Assigned	Pending QA		1 ...

Quality Assurance: Alerts & Sending Notices

Alerts are designed to highlight any visits that have a variation.



QA Alerts are triggered based on these indicators:

Deviated: clinician has indicated that they did not follow MD order (includes min/max ranges not being met)

PCG: clinician has indicated the PCG performed this item

Flag: clinician flagged this item for your review

Order: clinician took an order in the visit

QA may send a note to other users about alerts.


1. Click on the **alert icon** to review alerts
2. Select one or multiple alerts & click Send Note
3. Note Type: QA Notification will appear pre-filled with alert(s) selected.
4. Details May be edited, select user(s) to send note to and save
5. User(s) will receive notice in their inbox

A form titled "Note" with a close button (X) in the top right corner. The form contains several fields: "Note Date" with the value "07/14/2021", "Note Type" with the value "QA Notification", and "Reminder Date". Below these is a field for "Tag Patient/Employee". There is a section for "CC" (Carbon Copy) with a text input field. A "Details" section contains a pre-filled text: "For an assignment on 02/01/2020 for Charlotte Calypso with Ann Upchurch:". At the bottom is a field for "Resolution/Comments".

Quality Assurance: Reviewing Documentation

Select the visits you wish to review & click **Preview**.

The assignment preview will appear listing the visits you selected.
Choose the first visit you would like to review.

 QA Preview

Select Visit to Preview

Annie Lewis at Edie Carlton on 07/29/2020 08:20

Annie Lewis at Daniel Tosh on 10/01/2020 07:05

Judy Bruley at Nora Durst on 10/21/2020 11:16

Judy Bruley at Nora Durst on 10/26/2020 18:41

Summary Page

At any time you may also select the Summary page to see what work you have done on other visits in this batch.

Quality Assurance: Approve/Decline Docs

Choose the first visit you would like to review. User may scroll & preview visit in its entirety.

Optional Fields

Create 485: shows on assessments/evals only; check box to create or preview 485

Choose Group: group options will populate based on assignment; select group that needs review

Choose Data Point: data point options will populate based on assignment; select data point that needs attention

Choose Progress Report:

QA Note: this field is to apply a note only to this visit including reason for decline, required if declining assignment

Save: save selections and note

Approve: marks visit as approved and complete

Decline: will send the visit back to the clinician with rejection entered in Notes for Visit field

Summary page will automatically load once last visit in batch has been reviewed.

✓ APPROVE

✕ DECLINE

✕

Choose Group

Choose Data Point

Choose Progress Report

QA Note

SAVE

Quality Assurance: Overview of POC Options

Password: not required to Preview

Print Start: start date defaults to day after last day of prior cert period, can be changed

Print End: end date will default based on chosen timeframe, can choose custom

Recert Notice Date: will default to two weeks prior to end of cert period; can be changed

Verbal SOC: optional field; populates date in box 23

Service Type: a 485 may be created for one service or multiple Physician: Will default to ordering but can be edited; may also select from multiple physician phone/fax if they exist

Preview: no password required; downloads the PDF but does not send to orders or archive

Send to Orders: password required; sends to New Orders to be reviewed before being sent to MD; does not get archived in chart until it is marked to be sent to the MD

Send to MD: password required; assumed to be final version; is sent to Orders: Pending MD Signature & Archived in the patient chart as active

Note: the print start and end dates reference all intervention & medication start & end dates and pull all orders that fall within those dates

Ex. Dates: 04/01/21-10/01/21

Intervention/Med start date 03/31/21 will appear

Intervention/Med end date of 04/2/21 will appear

Intervention/Med start date of 10/02/21 will not appear

Quality Assurance: POC

Preview and create 485 directly in QA based on review of assessment or evaluation.

[Clinical](#)> [Quality Assurance](#)> [Select assessment/evaluation](#)> [Preview](#)> [Check box to create 485](#)

☒ Create 485

Time Frame
Custom

Print Start
03/28/2022

Print End
05/27/2022

Recert Notification Date
05/13/2022

Verbal SOC

Service Type
PT x

Physician
STEPHANIE ACORD (Ordering)

Physician Address
1500 Cooper Street Fort Worth, TX 76104 x

Physician Office Number
(817) 789-4130 x

☒ Create 485

Time Frame
Custom

Custom

30 Days

45 Days

60 Days

90 Days

180 Days

Timeframe

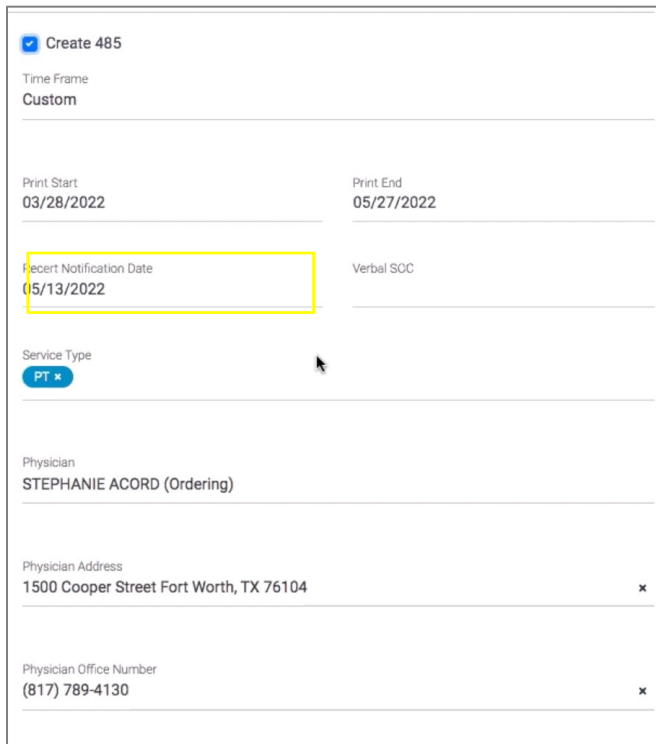
Select timeframe or custom start/end dates; options include Custom, 30 Days, 45 Days, 60 Days, 90 Days, or 180 Days

Quality Assurance: POC Recert Notice Date

Indicate Recert Notice Date which will trigger notification to users with notification set in user group or individual user profile.

Recert Notice Date

Date will default to two weeks prior to end of cert period; can be changed



The screenshot shows a web form titled "Create 485". It includes fields for "Time Frame" (set to "Custom"), "Print Start" (03/28/2022), "Print End" (05/27/2022), "Recert Notice Date" (05/13/2022, highlighted with a yellow box), "Verbal SOC", "Service Type" (PT), "Physician" (STEPHANIE ACORD (Ordering)), "Physician Address" (1500 Cooper Street Fort Worth, TX 76104), and "Physician Office Number" ((817) 789-4130). There are also "PREVIEW", "SEND TO ORDERS", and "SEND TO MD" buttons at the bottom.

Signature

The 485 will be created with the signature of the clinician responsible for assessment/evaluation; the reviewed by field on the assessment/evaluation will show user responsible for QA

 PREVIEW

 SEND TO ORDERS

 SEND TO MD

Preview: no password required; downloads the PDF but does not send to orders or archive

Send to Orders: password required; sends to New Orders to be reviewed before being sent to MD; does not get archived in chart until it is marked to be sent to the MD

Send to MD: password required; assumed to be final version; is sent to Orders: Pending MD Signature & Archived in the patient chart as active

Quality Assurance: Batch Summary Page

The Summary page will automatically load once last visit in batch has been reviewed. Make adjustments by going back into visit previews or **Finalize**.

- Summary of each visit reviewed in the batch
- Includes any notes taken regarding the visit
- Includes reason for being rejected back for corrections
- Changes may still be made to visits prior to finalizing the batch
- Finalize will require user password to confirm approvals & declines
- Approved visits will move to a completed status in the chart w/ QA approval signature
- Declined visits will be sent back to clinician for corrections
- Notes taken will stay with the visit & show history if/when additional notes are made

QA Preview

FINALIZE

Select Visit to Preview

Summary Page

Search

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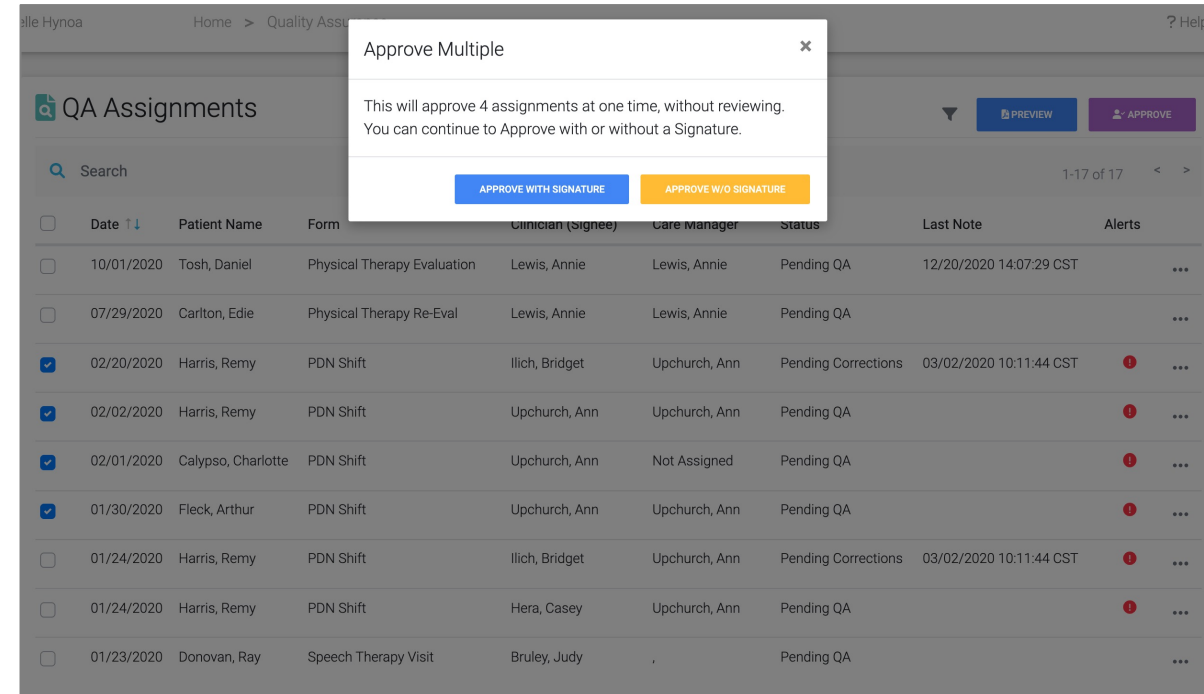
>

Visit	QA Notifications	Status
Annie Lewis at Edie Carlton on 07/29/2020 08:20	0	Approved
Annie Lewis at Daniel Tosh on 10/01/2020 07:05	0	Approved
Judy Bruley at Nora Durst on 10/21/2020 11:16	0	Declined
Judy Bruley at Nora Durst on 10/26/2020 18:41	0	Declined

QA: Approve without Review

Approve visits without review by selecting one or multiple visits and clicking **Approve.**

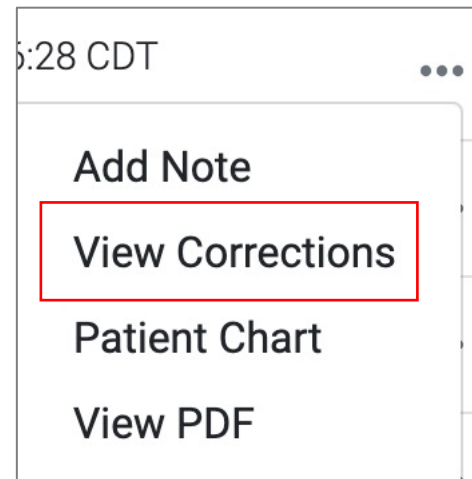
- Select Multiple Visits & click Approve Selected
- User has two options: approve with or without signature
- Approve with Signature: requires password; marks as completed; e-signs visits as Quality Assured by user
- Approve without Signature: marks as completed without an e-sign for Quality Assurance
- Cancel: Will return user to QA page



QA: Audit of Corrections

When a visit has been corrected by the clinician and sent back to QA you will have two places to view the audit of these changes.

First, by clicking the [action ellipsis](#) next to the Corrected assignment which will bring up this screen with a side by side of changes. Second is the PDF of the visit itself (next slide).



Lewis, Annie at Lasso, Ted on 08/31/2021		
Initial Assessment Changes		
PT - Reason for Therapy Referral	Current Value: Therapy	Previous Value: therapy
PT - Referral Source	Current Value: ABC Pediatrics	Previous Value:
Select Diagnosis	Current Value: R6259,E,	Previous Value: R6259,,
Allergies (Other)	Current Value: Allergies (Other): food: eggs, milk, wheat, peanut butter, seasonal	Previous Value: Allergies (Other): food: eggs, milk, wheat, Peanut butterSeasonal
Safe Room Identified	Current Value: Laundry room	Previous Value:
PT - Strengths	Current Value: Ted has focus and a positive attitude.	Previous Value:

QA: Audit of Corrections (PDF)

When a visit has been corrected, the end of the PDF of the visit will show the audit of the changes. This includes the clinician's e-signature with date, time and device electronic signature when correction was submitted. Original entry includes strikethrough with details on the current data.

History

Revised By

Annie Lewis (PT, SLP, OT, RN)

Date: 09/16/2021 18:02 CDT

172.31.82.79

Initial Assessment Changes

PT - Reason for Therapy Referral: ~~therapy~~ => Therapy; **PT - Referral Source:** ~~Not Answered~~ => ABC Pediatrics; **Select Diagnosis:** R6259,, => R6259,E,;

Allergies (Other): ~~Allergies (Other): food: eggs, milk, wheat, Peanut butter~~Seasonal => Allergies (Other): food: eggs, milk, wheat, peanut butter, seasonal; **Safe**

Room Identified: ~~Not Answered~~ => Laundry room; **PT - Strengths:** ~~Not Answered~~ => Ted has focus and a positive attitude.; **Prior Functional Status:** ~~Not Answered~~ => independent community ambulator;

Exclude from QA

Clinicians may be marked to exclude from QA in their employee profiles.

- If a clinician is marked as exclude from QA any visit submitted with an alert still goes to QA.
- Nurse Marked as Exclude from QA: Visits submitted with no alerts will bypass QA and move to completed status automatically.

Visits submitted with any of the following will still go to QA regardless of their exclusion:

- Visit includes a new order
- Visit includes a deviation of order
- Visit includes a flag
- Visit includes a PCG Nurse not marked to exclude from QA