

CubHub Clinical

Therapy Initial Evaluations

Initial Evaluations & Live Patient Record

A patient's initial evaluation is going to trigger the Live Patient Record once it passes QA.

The Live Patient Record is a live record of patient's clinical data.

The live patient record allows clinical updates to the patient chart between recertifications and allows up to date patient care through immediate communication with the mobile app.

Daily visit note activity live updates goal progress in the LPR.

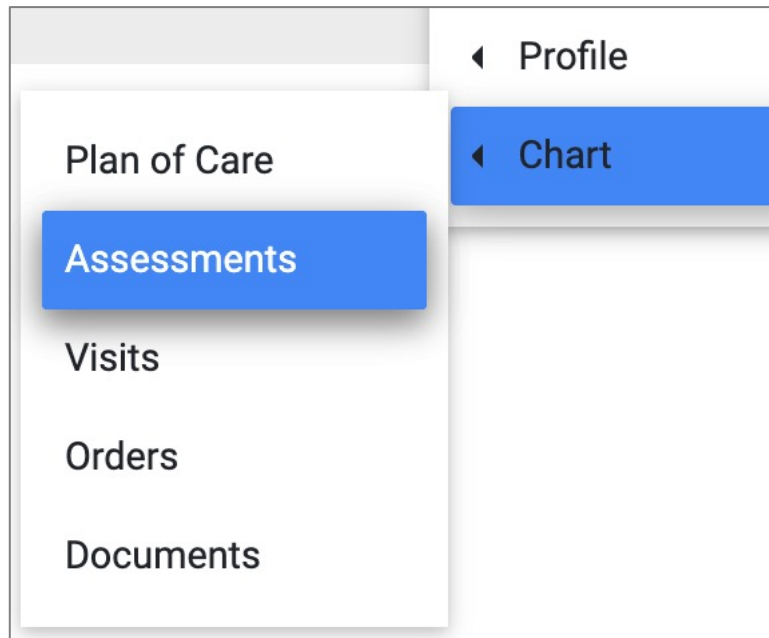
Only once a patient in CubHub has a Live Patient Record can the Plan of Care be created.

A Re-Eval will impact the LPR once it passes QA.

Option 1

Begin an Initial Evaluation from the Patient Chart

Clients> List> Action ellipsis next to patient name> Chart> Assessments> +> Make Selections> Verify



A screenshot of a 'New Assessment' form. The form contains the following fields and options:

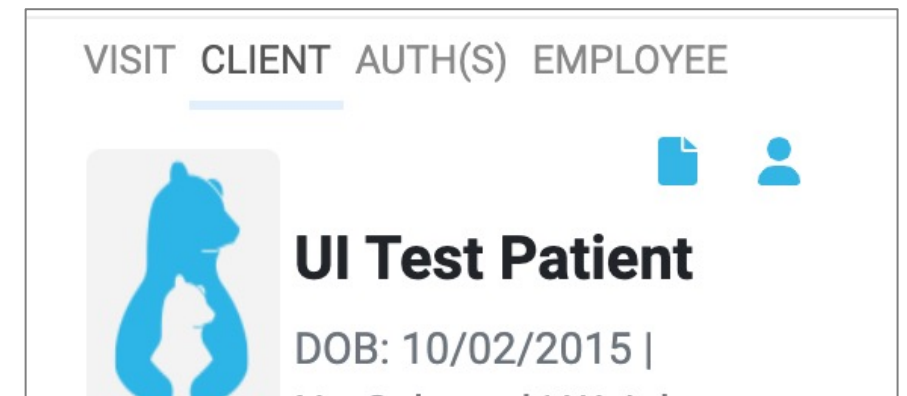
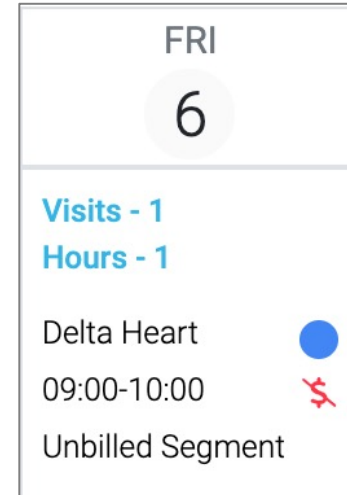
- Assessment Type:** A text input field.
- Assessment Date:** A date input field showing '08/06/2021'.
- Start Time:** A time input field showing '07 00'.
- End Time:** A time input field showing '08 00'.
- Are you Clocking in?:** Two radio button options: 'Yes' and 'No'.
- Checkboxes:** Three checkboxes for 'Name: UI Test Patient', 'MRN: 001', and 'DOB: 10/02/2015'.
- Verify Button:** A blue button labeled '✓ VERIFY' at the bottom right.

Option 2

Schedule the Initial Evaluation in the calendar & navigate to patient chart to begin assessment

Calendar> Filter by patient> Select blank space in calendar> Fill in event scheduling box by selecting date, Initial Assessment, assigning employee> Save

Client> Profile icon> Action ellipsis in top right hand corner> Chart> Assessments> Select assessment> Verify details of shift to begin assessment



Selection Options

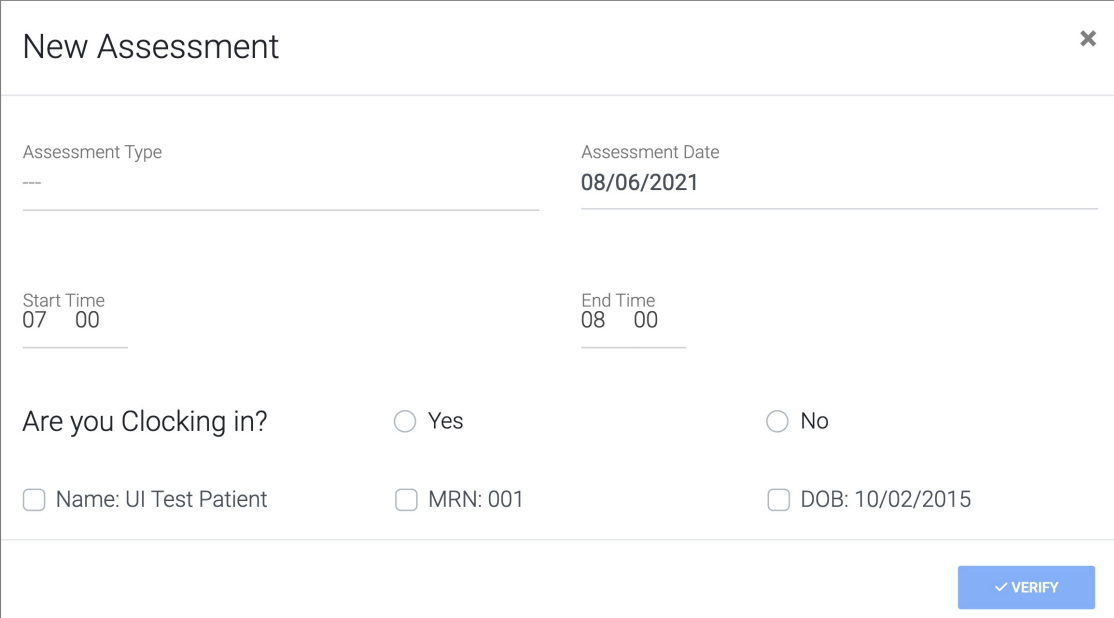
Assessment Type: When starting patient's care inside CubHub, an Initial Evaluation should be selected for completion.

Assessment Date: Users can back date the evaluation to a date on which the eval was actually completed or keep default of today's date.

Start/End Time: Users can adjust times to reflect the times the eval was actually completed or keep defaulted times

Clocking In: Optional if eval started in patient chart, required if eval first scheduled in calendar

Verify: Select at least two identifying characteristics of the patient to Verify selections



The screenshot shows a 'New Assessment' form with a close button (X) in the top right corner. The form is divided into several sections. The first section contains 'Assessment Type' with a dropdown menu showing '---' and 'Assessment Date' with the value '08/06/2021'. The second section contains 'Start Time' with the value '07 00' and 'End Time' with the value '08 00'. The third section contains the question 'Are you Clocking in?' with two radio button options: 'Yes' and 'No'. The fourth section contains three checkboxes: 'Name: UI Test Patient', 'MRN: 001', and 'DOB: 10/02/2015'. At the bottom right of the form is a blue button with a checkmark and the text 'VERIFY'.

New Assessment		X
Assessment Type ---	Assessment Date 08/06/2021	
Start Time 07 00	End Time 08 00	
Are you Clocking in?		<input type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/> Name: UI Test Patient	<input type="checkbox"/> MRN: 001	<input type="checkbox"/> DOB: 10/02/2015
		✓ VERIFY

Evaluation: Certification Period

When you clock in and begin your initial eval or a re-eval, the first step is to set the certification dates.

Action ellipsis beside submit button> Update Certification Period> Input start and end dates> Save

Cert Start and End Date

Start Date

End Date

SAVE

Goal start dates should match the cert start date.

When entering patient goals for this cert (based on example date where cert is 8/1/21-10/31/21:
NEW GOALS will need a 8/1/21 start date

For re-evals only:

GOALS THAT WERE MET in the current cert will need a 7/31/21 end date

GOALS NOT MET without any change may be left as is
GOALS NOT MET THAT NEED UPDATING need discontinued and cloned with 7/10 end date and clone needs 8/1/21 start date

Evaluation: Data Points

Evaluation sections will show based on therapy service type.

Users should save the information input to data points by clicking the green save button.

Monday, September 13, 2021

● Referral

● Subjective

● Objective

● Language

● Pragmatics

● Augmentative Communication

● Articulation

● Voice

● Fluency

● Oral Motor

SHORT TERM GOALS

DATA POINTS

Referral

Reason for Therapy Referral

Referral Source

Select Diagnosis

DiagnosisO/E

Date

Only the data points that are addressed and input to the system will pull to the PDF of the evaluation.

Some data points will auto-populate based on data from the patient's chart.

Evaluation: Adding Goals

Add goals in specific areas of focus or in the Plan group. Goals will default to Custom, but user can Change to Standard goals to pull from a pre-populated selection, as well.

**Short Term Goals> +> Input short term & long term goal>
Include a start date> Select actions> Save**

Orders (Long Term Goals & Short Term Goals) ×

[Change to Standard](#)

Short Term Goals Information

Short Term Goals

Custom Long Term Goals

Long Term Goals

- Start and End dates should be selected based on cert periods.
- See the next slide for details about dates and other actions.
- See the Therapy Goals guide for all details related to goals.

Actions

Start Date
08/01/2021

End Date

☐ Additional Details Required ☒ Show in Visit ☒ Show on 485

[SAVE](#)

Therapy Goal Progress: Evaluations & Re-Evals

Add goal progress, comments, and/or date mastered on evals & re-evals.

[Click into goal](#)> [Input comment\(s\) and/or mastered on date](#)> [Save](#)

Actions

Mastered On

Comments

Start Date
09/26/2021

End Date

☐ Additional Details Required ☒ Show in Visit ☒ Show on 485

Comments

Comment on progress towards goal; field can be used independent of Mastered On specification or in conjunction with Mastered On field

Mastered On

Select date to designate a goal as mastered

End Date

If Mastered On date is input, the End Date will auto-populate to current date, discontinuing the goal; can be changed to a different date; goal can be discontinued independent of goal being mastered

Cora will increase independence during self-care tasks through participation in a variety of therapeutic activities to build body awareness, learn sequencing of multi-step tasks, and develop appropriate motor control for dressing and managing clothing fasteners (zippers, buttons, snaps) with at least 80% accuracy during 3 opportunities. **Discontinued on:** 11/01/2021 **Mastered On:** 11/01/2021 - goal has been mastered; Cora is capable of completing these self-care tasks independently.

Therapy Goal Progress: Evaluations

Include Goal Progress on an eval or re-eval by selecting the checkbox at the time of submission.

Submit

Please enter password to submit

Password

☒ Include Goal Progress

SUBMIT W/DOWNLOAD

SUBMIT W/MED ORDER

SUBMIT

Submit: moves assessment to Pending QA or Completed status*


Submit w/Order: moves assessment to Pending QA or Completed status* & creates an order in Clinical Orders

Submit w/Download: moves assessment to Pending QA or Completed status* & downloads a PDF of the assessment to user's computer

*status varies based on company preferences/set up

Submit> Include Goal Progress> Submit

If included with the eval or re-eval, the Therapy Goal Progress PDF will be included with the eval or re-eval PDF.



Client:

Address:

Pharmacy:

Cora Arden

924 Kingston Dr. Mansfield, CO 76063

Lyons Pharmacy - 123 CubHub Lane Fort Worth, TX 76116 - (882) 442-7432

MR#: MRB178 80

DOB:

04/16/2017

Physician:

Address:

Sami Hadeed

1500 Cooper Street Ft. Worth, TX 76104

#	Start Date	LTG/Area	STG	Current	Baseline	Assist/Guide	Date Mastered	Comments
1	08/30/2020	LTG ONE	STG 2	20	1	Contact Guard		
2	01/26/2021	help patient every 1 day	within 6 months Cora will identify 50 familiar objects	50	2	Independent		
3	01/26/2021	help patient every 1 day	cora will learn 100 new words	90	90	Min		
4	01/28/2021	test	cora will count to 10	50%	100%	Independent		
5	01/29/2021	help patient every 1 day	Cora will feed herself	1 out of 2	1 out of 2	Min		
6	11/05/2020	Patient will improve in fine motor skills within the duration of occupational therapy services	Cora will demonstrate improved fine motor skills and hand strength through participating in a variety of therapeutic activities including: independently open/close packages/containers/bags, using tongs to pick-up/transfer items, cutting relative therapy, etc with appropriate utensil usage and good body mechanics for 80% of task over 3 opportunities.	0%	0%	Max		
7	11/05/2020	Patient will improve in fine motor skills within the duration of occupational therapy services	Cora will improve bilateral motor integration through participation in a variety of therapeutic activities for smooth, reciprocal movements including: arm crawling across the mats, bear walking, crossing over the horizontal ladder, jumping jacks, etc with good motor accuracy for at least 80% of task during 3 opportunities.	0%	0%	Max		
8	11/05/2020	Patient will improve in fine motor skills within the duration of occupational therapy services	Cora will increase independence during self-care tasks through participation in a variety of therapeutic activities to build body awareness,	80%	0%	Max	11/01/2021	goal has been mastered: Cora is capable of completing these self-care tasks independently.

Evaluation: Goals Overview

Goal Types: Standard & Custom

Standard: pre-loaded into the system & attached to LTG

Standard: may include brackets [] for patient specific parameters

Custom: allows user to create all custom text

Custom: Allows user to create custom LTG

Long Term Goals

Standard short term goals all mapped to a standard LTG

Standard goals may be used multiple times in single assessment

When custom LTG is created it may be used multiple times

***Goal states are further detailed in Goals Guide**

Goal Actions:

Start Date

Defaults to today's date

Certification start date should be used for initial eval

Next certification date should be used for re-evals

End Date

Should not be used pre-emptively (i.e. if cert period ends 3/31 do NOT enter end date of 3/31)

End date should be left blank until goal is achieved/ modified

Additional Detail Required

Select box to require additional detail each time this goal is charted on in a visit

Show in Visit

Select box to allow goal to show in visit for charting

Show on 485

Select box to allow goal to pull to 485

Evaluation: PCG Signature

When the evaluation is complete, users can get PCG Signature.

Options are accessed by clicking the action ellipsis beside the Submit button.

Additional Signature Capture additional user signatures to print on pdf of eval

PCG Signature:

Capture PCG signature

Update Certification Period

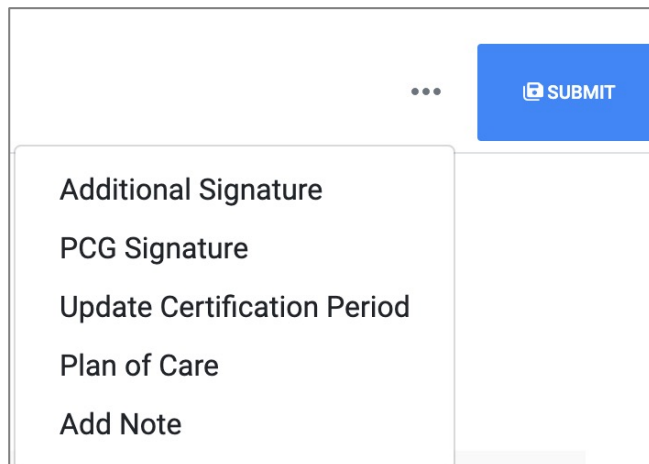
Input, change, or update cert period

Plan of care

Preview the patient's 485

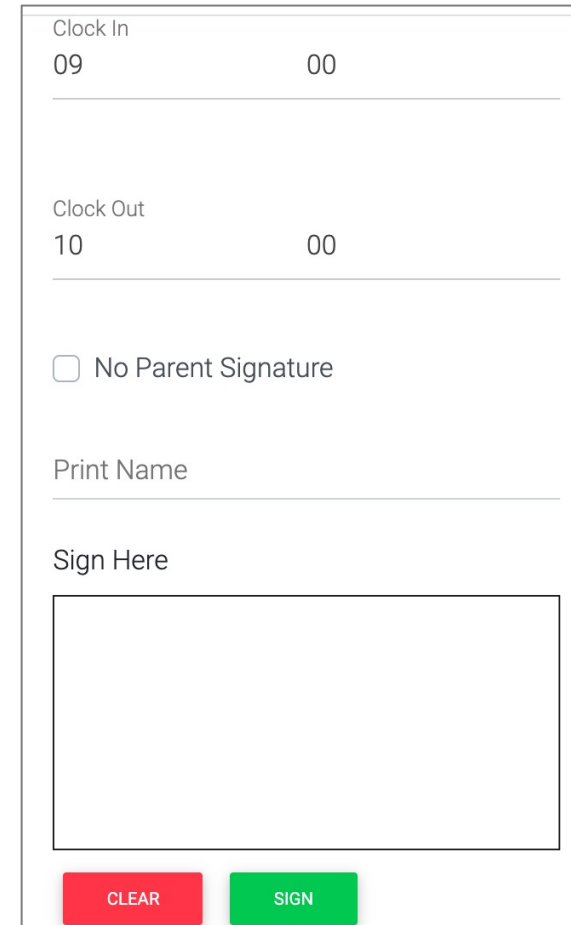
Add Note

Add a note to the patient's chart

A screenshot of a software interface showing a blue 'SUBMIT' button with a three-dot action ellipsis to its left. A dropdown menu is open, listing five options: 'Additional Signature', 'PCG Signature', 'Update Certification Period', 'Plan of Care', and 'Add Note'.

PCG can adjust clock in and out times, if needed, prior to signing. If no PCG signature is available, check the box and give reason.

Click **Sign** to accept signature.

A screenshot of a signature capture form. It includes fields for 'Clock In' (09:00) and 'Clock Out' (10:00). There is a checkbox labeled 'No Parent Signature'. Below this is a 'Print Name' field. A large 'Sign Here' box is provided for the signature. At the bottom are two buttons: a red 'CLEAR' button and a green 'SIGN' button.

Sign & Submit

Submit evaluation by clicking the blue Submit button, prompting the system to generate the box below.

Users will sign by inputting password & choose from the three submit options.

Submit

Please update any segments and then enter password to submit

Password

Billing Details

Service	SLP- Eval and Comp CO Medicaid - LTC (ST)	
Start Time	09 00	End Time 10 00

+ NEW SEGMENT

SUBMIT W/DOWNLOAD SUBMIT W/ORDER SUBMIT

User may update segments to bill different service codes, as needed, within the visit's timeframe.

Submit: moves evaluation to Pending QA or Completed status*

Submit w/Order: moves evaluation to Pending QA or Completed status* & creates an order in Clinical Orders

Submit w/Download: moves evaluation to Pending QA or Completed status* & downloads a PDF of the eval to user's computer

**status may vary based on company preferences and state requirements*

Initial Evaluation FAQs

Q. We are switching to CH from another EMR and the initial evaluation is already completed for my patient. Why can't I just do a re-eval?

- A. The initial eval is needed to trigger the LPR and to “tell” the system the start of care details for your patient. If you have a copy of the initial evaluation, you can enter only the required data points into a back-dated initial eval and submit. Then, upload a copy of the completed eval into the patient chart; however, the patient's goals and other data will need to be input to the LPR or a re-eval will need to be completed at that time, as well.

Q. Can I put my evaluation back into working status?

- A. Based on a user's permission group, an evaluation can be put back into working status to allow for needed changes. Once the updates are made, the evaluation should be resubmitted.

Q. What status is my evaluation in once it is submitted?

- A. Evals will be submitted to QA to be reviewed and e-signed before being sent to the physician. The eval will be in 'Pending QA' status.

Q. Where can I find more information on the process my eval takes next?

- A. From QA, and eval will flow to Orders where it is sent to the physician. See our QA, Orders, and Faxing guides for more information.

Permissions

User Group Permissions Needed

Patient:

Assessment/Evals

Contacts

Details

Live Patient Record

Point of Care

User Groups: only clinical admin users can access and complete evaluations

Access all Assessments: if checked, allows user to access assessments in working status that were started by another clinician

Patient> Quality Assurance> View & Edit: allows user to process an assessment into completed status and put it back into working status