

PACElogic™ Optimizing your EHR for Audit

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Agenda

- Capturing IDT minutes in the EHR
- On-call documentation
- Orders tracking
- Recommendations and reconciliations
- Template demos: SDR, medication reconciliation, IDT minutes, specialist recommendations

Why capture the IDT Minutes in the EHR?

IDT Minutes in the EHR: remaining alert

CMS regulation 460.102 (d)(2)(i & ii) requires PACE team members to regularly inform the IDT of the participant's condition and remain alert to the input of others. IDT discussions must be captured directly in the EHR to help your team:

- Meet CMS and State Administering Agency (SAA) regulations
- Avoid duplication
- Ensure accurate information is documented directly into the participants record
- Ensure a complete, accurate, and accessible medical record



Capturing the IDT Minutes in the EHR

Capturing IDT discussions in the EHR

There are IDT templates in the EHR to assist.

How to optimize the efficiency of the IDT template:

- The IDT member bringing the issue to team pre-populates the template in the EHR
- The scribe's screen is shared for the entire IDT to view
- The identified scribe(s) capture IDT conversation in the appropriate section of the template
- Follow-up task can be added directly to the IDT note by adding an order as appropriate or added as an appointment to the schedule.

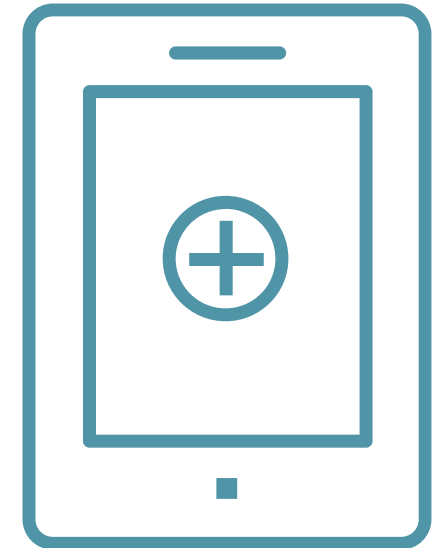


Documenting on-call providers in the EHR

Documenting on-call in the EHR

CMS regulation 460.100 (e)(1) requires that the PACE program have on-call providers available 24 hours per day and 460.210 (a) & (b) require that the medical record is complete and accurate.

- Utilizing orders tracking to capture on-call
- CMS on-call audit universe is populated when EHR is used to capture on-call
- Follow-up on-call notes with IDT discussion to ensure follow-up has occurred.



Orders tracking and provision of service

Expectations of tracking provision of service

CMS regulation 460.98 (b) (5) requires that the PACE program document track and monitor the provision of services across all settings.

Additionally, the 2023 proposed Audit Protocol includes a monitoring report to be completed by the PACE program for 30 participants selected by CMS. The monitoring report is to include:

- Date the service was ordered, approved, or care planned
- Description of the ordered, approved, or care planned service
- Date the service was provided



More important than ever before

Any ordered, approved, or care planned service or item can monitored in orders tracking.

How to optimize the efficiency of orders tracking:

- Establish and document expectations of IDT members in relation to entering and tracking services and items through completion
- Frequent and ongoing monitoring of outstanding and/ or incomplete orders



Medication Reconciliation and Specialist Recommendations

Specialist Recommendations and Medication Reconciliation

CMS expanded the requirement of documenting follow-up of recommendations by PACE program contractors, including specialty providers.

The medication reconciliation template and specialist recommendation templates allow the program to:

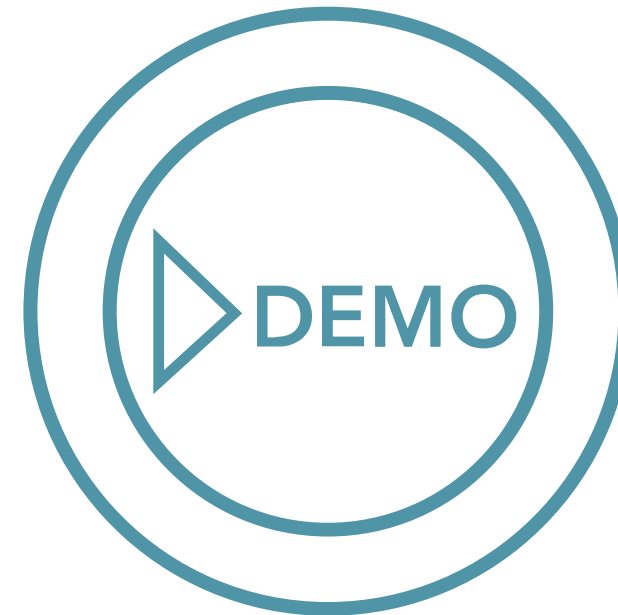
- Clearly demonstrate the recommendations were reviewed
- Document the reasons for not approving or providing the service



Template Demos

Demo of Templates

- SDR template
- Medication reconciliation template
- Specialist recommendation template
- IDT meeting minutes template



Thank You

