Optimizing Your EHR for Audit

08/23/2023

CareVention HealthCare™ | A TRHC Division

Agenda

- Populating the Audit Universes
- Interdisciplinary Team (IDT) Discussion Template
- CMS Monitoring Report

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Populating the CMS Audit Universes

Where did that come from?

It is important to know where the information for your CMS Audit Universes are generated. The following universes can be pulled from PACElogic:

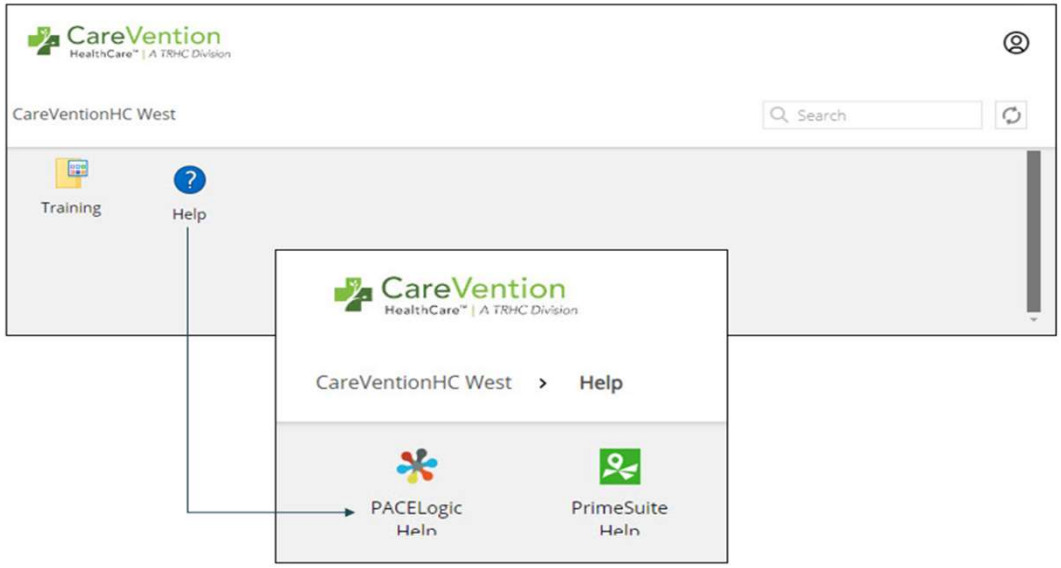
- Appeals
- Grievance
- List of participant medical record (LOPMR)
- On-call
- Service Determination Request

For the information to populate correctly it must be entered in the right place.

Informed Documentation

Establishing and expectation and providing the tools to get there will be the first step in set your program up for audit success:

- Accessing the help files



CMS Audit Universes

Review the Audit Guidance to ensure you are documenting in the correct location for CMS Audit Universes.

Quality

- 2023- CMS Monitoring Report Tool.
- 2023-PACElogic CMS Audit Guidance for PACE.
- 2023-Reporting timeline tool.
- Create an Incident Report
- Create or Edit Participant Death Report
- Export or Print a Report
- Find a Note
- LOPMR reference guide
- Record a Fall
- Record a Med Error
- Record a new Grievance
- Record a Non-Fall (General) Incident
- Record Follow Up on an Existing Grievance
- Service Determination Request
- Update an Existing Grievance

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IDT Discussion Template

IDT Requirements

In the Code of Federal Regulations 460.102 (d) (2) CMS identifies the responsibilities of the IDT to include:

(2) Each team member is responsible for the following:

(i) Regularly informing the interdisciplinary team of the medical, functional, and psychosocial condition of each participant

IDT Requirements

In the Code of Federal Regulations 460.102 (d) (2) CMS identifies the responsibilities of the IDT to include:

(ii) Remaining alert to pertinent input from any individual with direct knowledge of or contact with the participant, including the following:

(A) Other team members

(B) Participants

(C) Caregivers

(D) Employees

(E) Contractors

(F) Specialists

(G) Designated representatives

(iii) Documenting changes of a participant's condition in the participant's medical record consistent with documentation polices established by the medical director

Medical Record Requirements

In the Code of Federal Regulations 460.210 (b) CMS identifies the expectation for content in the medical record.

(b) ***Content of medical records.*** At a minimum, the medical record must contain the following:

(1) Appropriate identifying information

(2) Documentation of all services furnished, including the following:

(i) A summary of emergency care and other inpatient or long-term care services

(ii) Services furnished by employees of the PACE center

(iii) Services furnished by contractors and their reports

(3) Interdisciplinary assessments, reassessments, plans of care, treatment, and progress notes that include the participant's response to treatment

(4) All recommendations for services made by employees or contractors of the PACE organization, including specialists

Medical Record Requirements

In the Code of Federal Regulations 460.210 (b) CMS identifies the expectation for content in the medical record.

(7) Laboratory, radiological and other test reports

(8) Medication records

(9) Hospital discharge summaries, if applicable

(10) Reports of contact with informal support (for example, caregiver, legal guardian, or next of kin)

(11) Enrollment Agreement

(12) Physician orders

(13) Discharge summary and disenrollment justification, if applicable

(14) Advance directives, if applicable

(15) A signed release permitting disclosure of personal information

Benefits of Using IDT Discussion Templates

- Meet regulatory requirements
- Decrease request received during your CMS audit
- Avoid unnecessary duplication
- Ensures a complete medical record

IDT Discussion Template

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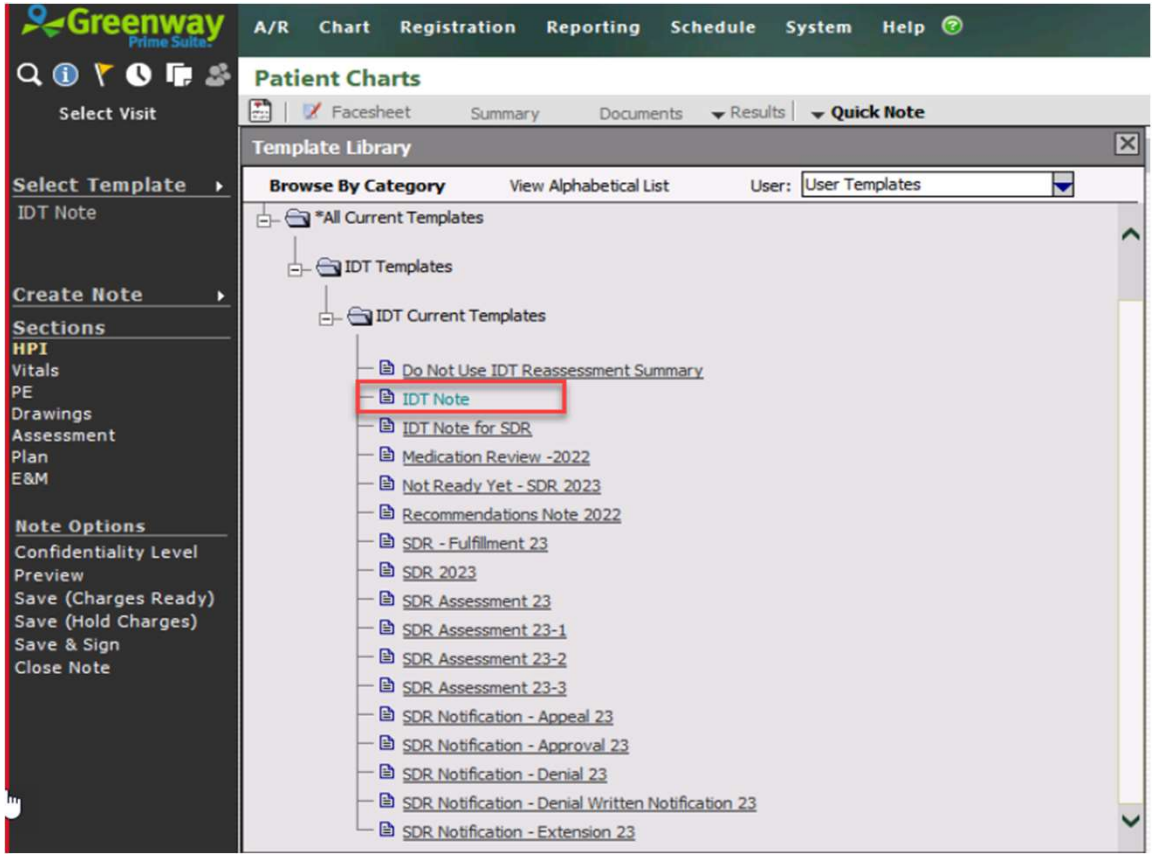

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Monitoring Report

Monitoring Report Tools

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Slide 16

AH0 Slightly adjusted formatting on this slide
Amy Haines, 2023-08-17T15:04:55.448

Thank you!