

Optimizing Your EHR for Audit

08/23/2023

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Agenda

Populating the Audit Universes

Interdisciplinary Team (IDT) Discussion
Template

CMS Monitoring Report

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

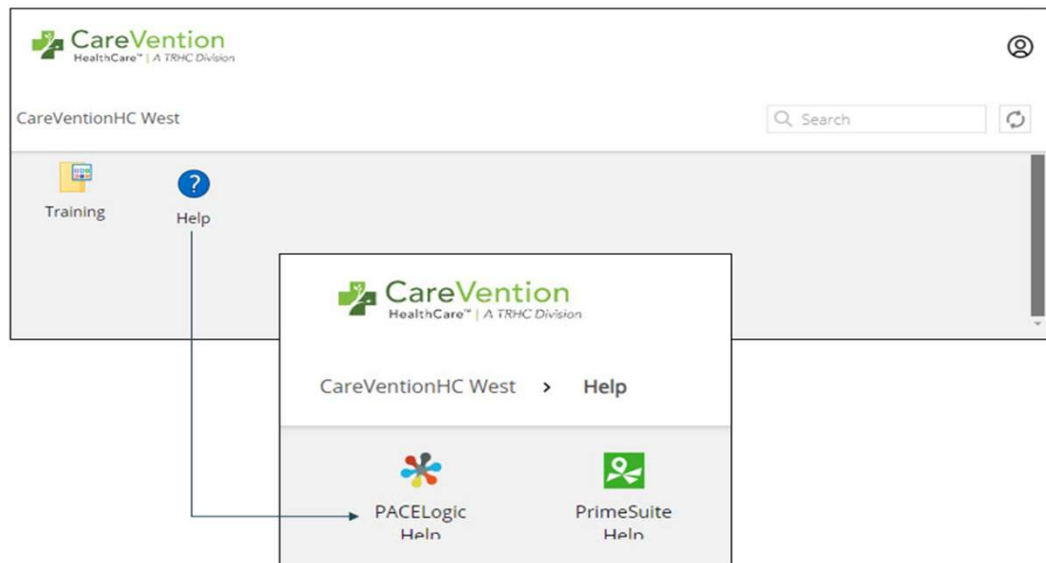
For the information to populate correctly it must be entered in the right place.



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](#)



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 policies 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.

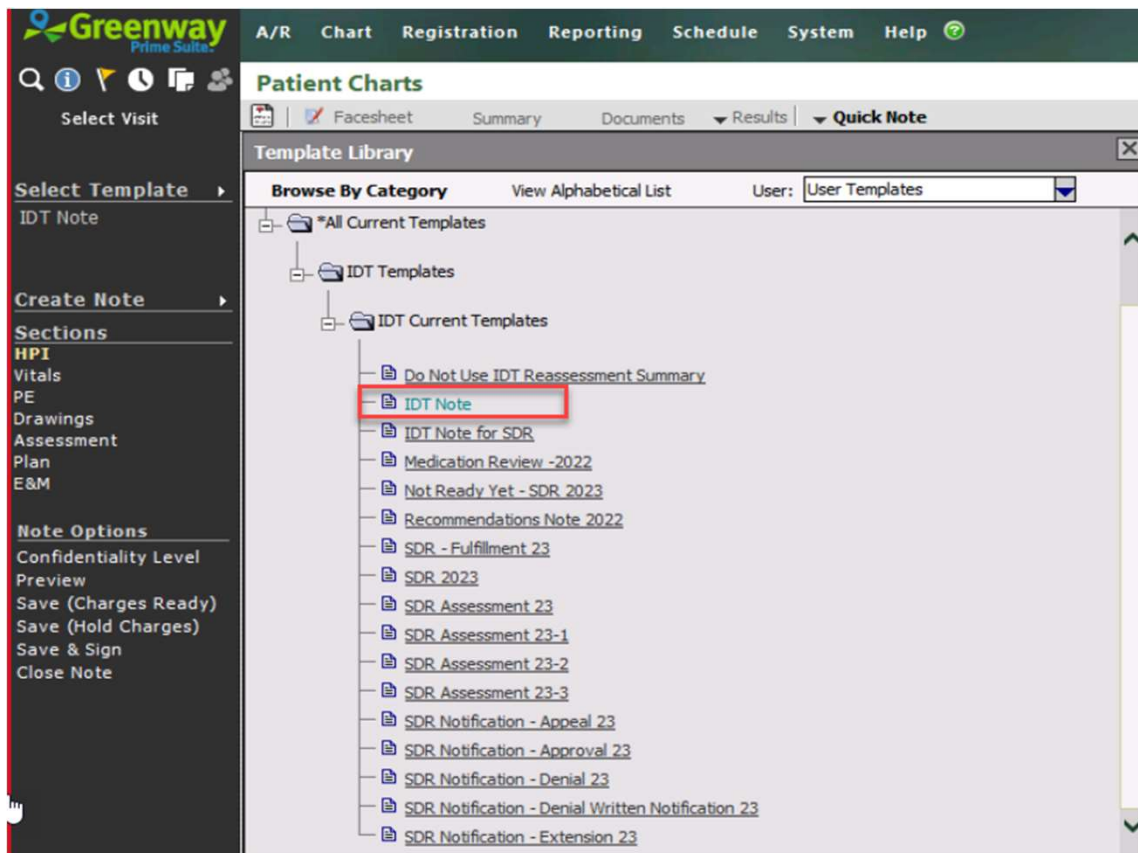
- (7) Laboratory, radiological and other test reports
- (8) Medication records
- (9) Hospital discharge summaries, if applicable
- (10) Reports of contact with informal support (for example, caregiver, legal guardian, or next of kin)
- (11) Enrollment Agreement
- (12) Physician orders
- (13) Discharge 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



The screenshot displays the Greenway Prime Suite software interface. The top navigation bar includes tabs for A/R, Chart, Registration, Reporting, Schedule, System, and Help. The left sidebar contains a 'Select Visit' section with a magnifying glass icon, a 'Select Template' section with a right-pointing arrow, and a 'Create Note' section with a right-pointing arrow. Below these are 'Sections' (HPI, Vitals, PE, Drawings, Assessment, Plan, E&M) and 'Note Options' (Confidentiality Level, Preview, Save (Charges Ready), Save (Hold Charges), Save & Sign, Close Note). The main content area is titled 'Patient Charts' and features a 'Template Library' window. This window has a 'Browse By Category' section with a tree view showing 'All Current Templates' > 'IDT Templates' > 'IDT Current Templates'. A list of templates follows, with 'IDT Note' highlighted by a red rectangle. Other templates include 'Do Not Use IDT Reassessment Summary', 'IDT Note for SDR', 'Medication Review -2022', 'Not Ready Yet - SDR 2023', 'Recommendations Note 2022', 'SDR - Fulfillment 23', 'SDR 2023', 'SDR Assessment 23', 'SDR Assessment 23-1', 'SDR Assessment 23-2', 'SDR Assessment 23-3', 'SDR Notification - Appeal 23', 'SDR Notification - Approval 23', 'SDR Notification - Denial 23', 'SDR Notification - Denial Written Notification 23', and 'SDR Notification - Extension 23'. The 'User' dropdown is set to 'User Templates'.

Monitoring Report

Monitoring Report Tools

Quality

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Slide 16

AH0

Slightly adjusted formatting on this slide

Amy Haines, 2023-08-17T15:04:55.448



Thank you!

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