HOSPICE IDG
TRAINING MANUAL

<u>May 2023</u>

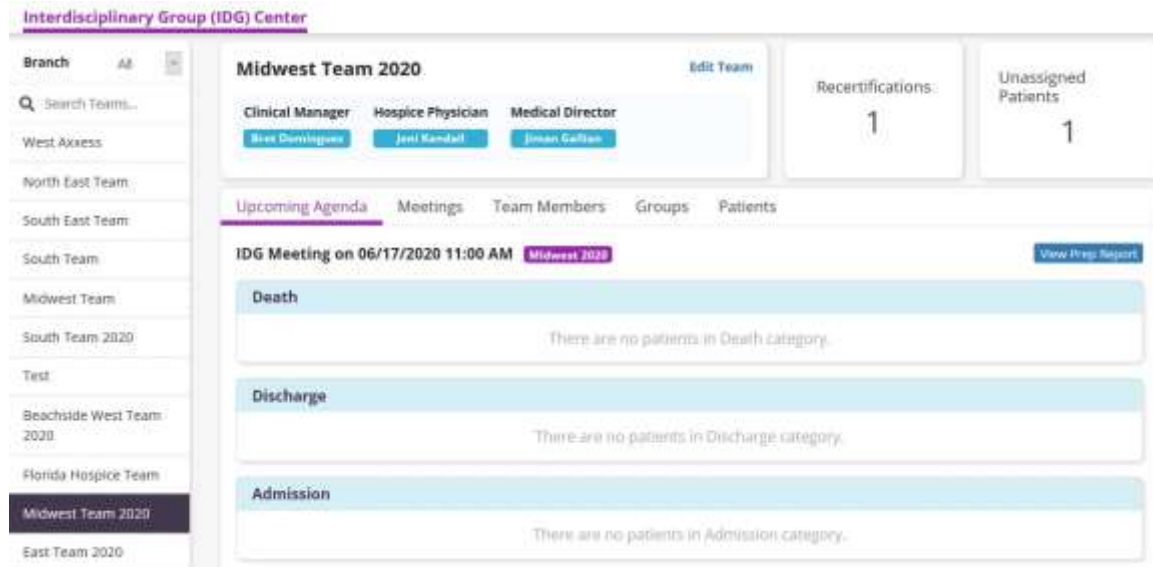## Table of Contents

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IDG CENTER

Centers/Interdisciplinary Group (IDG) Center

The IDG Center gives users complete control over IDG meeting processes. All information is accessible/consolidated in a central location for easy management of all IDG-related tasks.
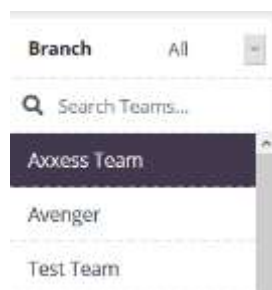
Filters - Organize results by choosing the branch (if more than one) or search by team name to narrow results. Users can also scroll down the list of IDG teams.

Top Tiles - Select a team from the left-side menu to view details. In the top-left tile, the team's name and members are displayed. The number of recertifications and unassigned patients appear in the top right. Select the **Edit Team** hyperlink to add or update team information.
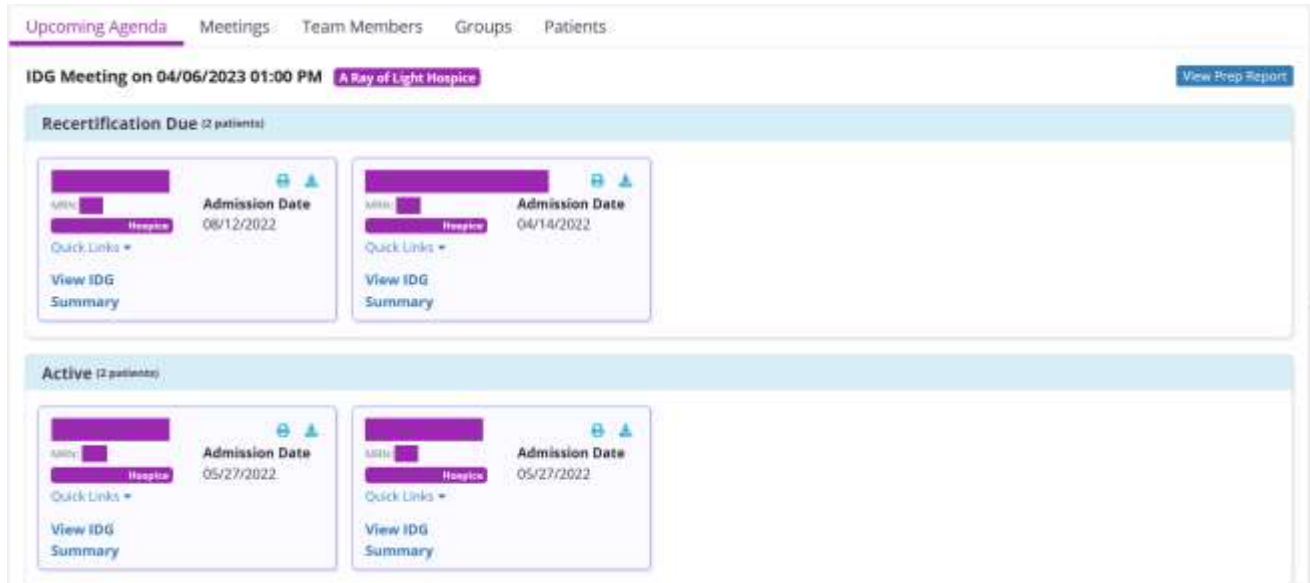
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UPCOMING AGENDA

The **Upcoming Agenda** tab displays information for the team's next IDG meeting. Patients are categorized based on their activity in the software:

- Death
- Discharge
- Admission
- Level of Care Changes
- Recertification Due
- Active

Each patient tile shows the patient's name, MRN number and organization name. Print or download the IDG Summary/Comprehensive Assessment Update by selecting 🖨 or ⬇. The tile also offers Quick Links (hover to see) to go directly to different parts of the chart, including the allergy, authorizations, diagnosis, eMAR, frequency, infectious disease, level of care history, medication, non-covered items, patient chart, patient schedule, plan of care, vital signs and symptom

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ratings and deleted tasks. Selecting the **View IDG Summary** hyperlink enables the user to view and update the IDG Summary.

Select the **View Prep Report** button to look at categories of patients on the meeting agenda and search for key documents' statuses.
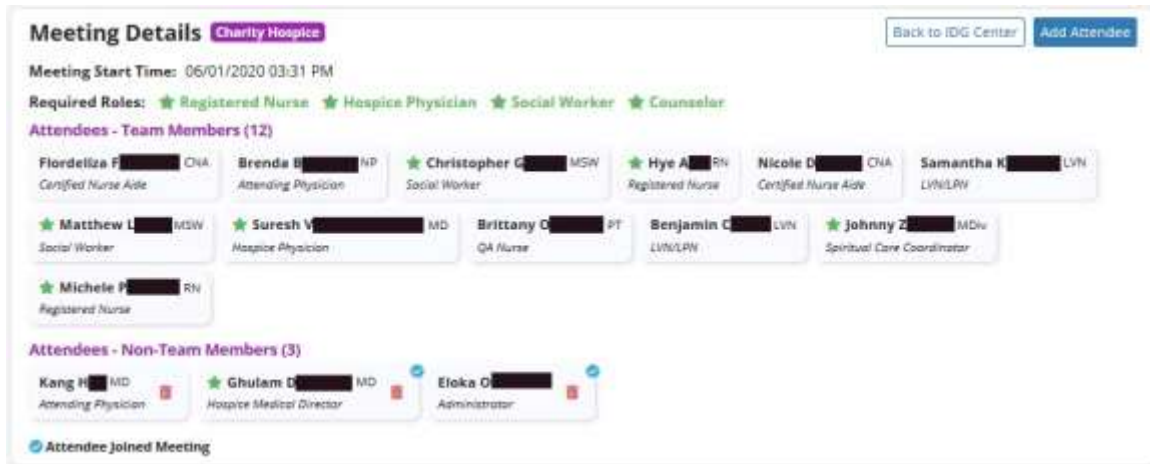
MEETINGS

The **Meetings** tab displays all meetings that have occurred and are scheduled for the team.

In the **Actions** column on the right side of the screen, the **View Meeting** link directs the user to the **IDG Meeting Details** screen.

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Meeting Details will show the organization name, meeting start time, attendees team members and non-team members.

🗑 = Remove Non-Team Members
✅ = Attendees Joined Meeting

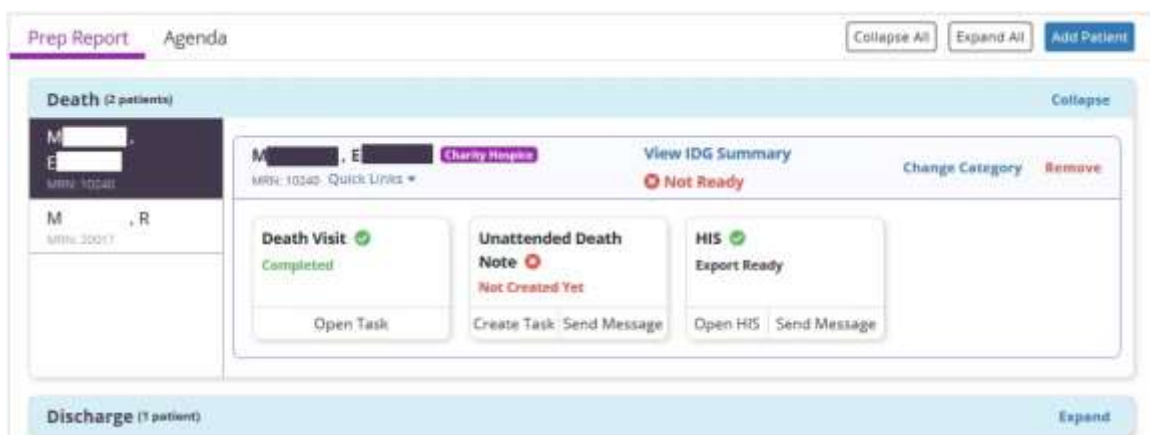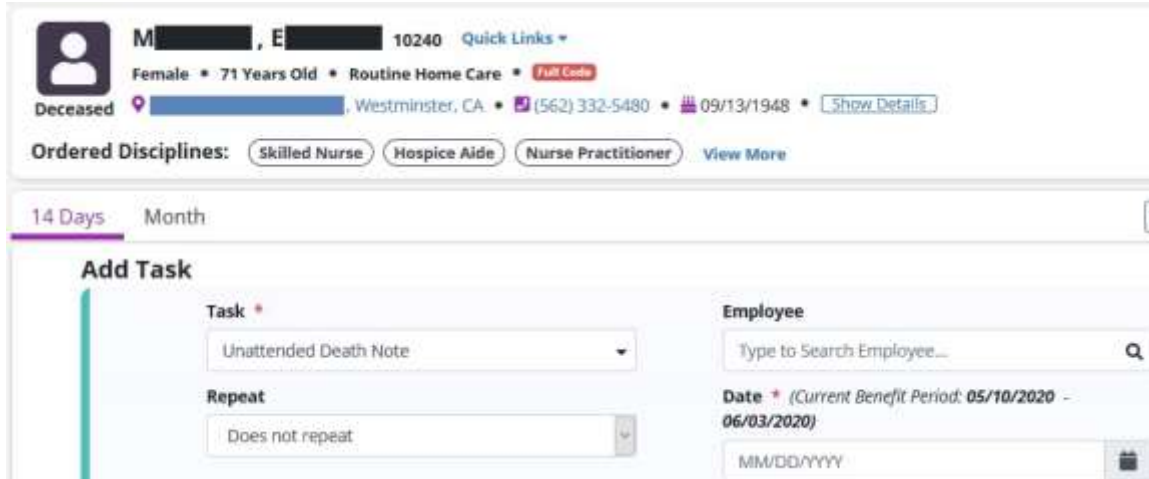To deactivate an IDG meeting schedule, select **Edit Team** and navigate to the Meeting Schedule section. Click the ellipsis icon under actions and select **Deactivate.** Once **Deactivate** is selected, the meeting schedule will move to the **Inactive** tab in the **Meeting Schedule** section.

Prep Report - The IDG Prep Report looks at categories of patients on the meeting agenda and searches for the statuses of key documents.

If a task is not present and should be present, you can schedule the document directly from the IDG Prep Report by selecting **Create Task**, which opens the

Schedule Center in a new tab and populates the required task in the task field. You can then assign a team member to the task for completion.
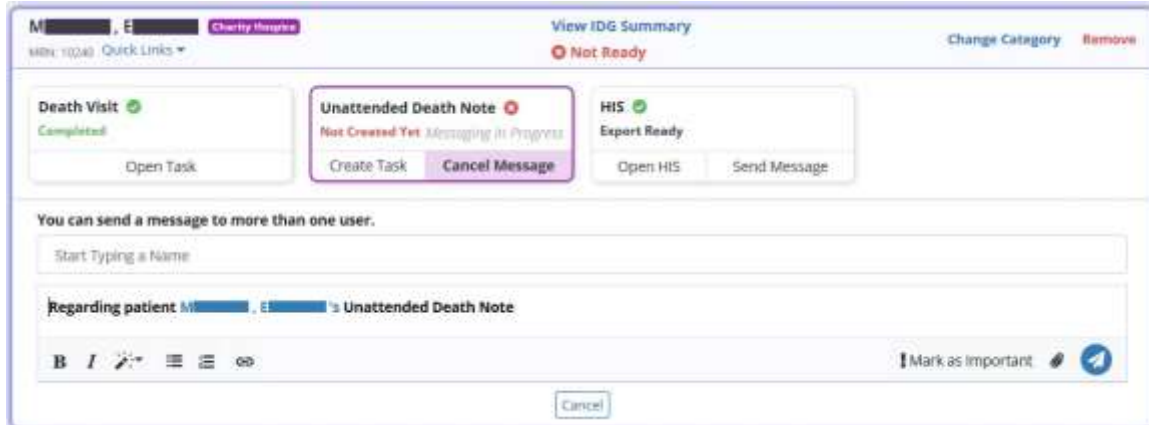
To send a message to a user, or group of users regarding an incomplete task, select **Send Message** below the task. The message will automatically include a link to the patient's chart identifying the task in question.
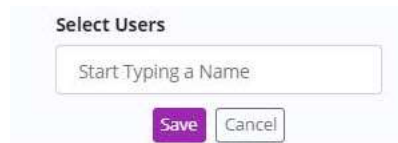
For patients who were a live discharge, the IDG Prep Report looks for the presence of the Discharge Visit or Unattended Discharge Note, and the Discharge HIS document, Discharge Summary, uploads of either the Revocation Statement, a Transfer Statement, or the Notice of Medicare Non-Coverage (NOMNC). If the document is present and complete, a ✅ appears. Open the document by selecting **Open Task** below the task name to review its contents without leaving the IDG Prep Report.

The Revocation Statement, Transfer Statement and Notice of Medicare Non-Coverage (NOMNC) are default upload types in your organization's Document Manager. Once you obtain those documents, upload them to the patient's chart and tag them with the appropriate document type to identify the documents in the IDG Prep Report.
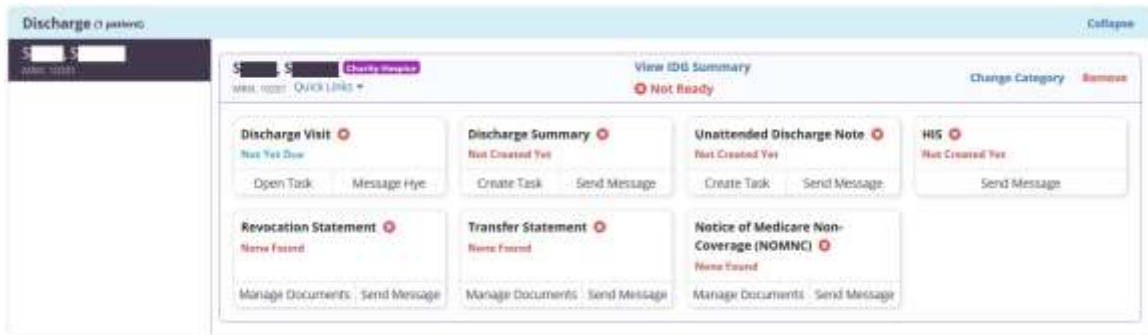
Agenda - All patients who belong to the care team appear regardless of their IDG group within the care team. The **Add Attendee** and **Add Patient** buttons on the right side of the screen enables users to manually add attendees or patients to the meeting.

Add Attendee - Enables users to ensure coverage for any members of the IDG who may not be able to attend the meeting. Select **Add Attendee** to add a user to the meeting (e.g., if the MSW (master of social work) is on vacation and another MSW will be attending the meeting). A field will appear to type the user's name and select **Save** to finish adding the attendee.

Add Patient - Enables users to add any patient on the same care team (but in a different group) to discuss prior to the patient's regularly scheduled IDG meeting. Select the **Add Patient** button, enter the patient's name and select which category to place the patient in on the agenda. Select **Save** and an IDG Summary will be created for the patient. The patient will still be included in his/her regularly scheduled group meeting and will be added to the current meeting for supplementary discussion.

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TEAM MEMBERS

The **Team Members** tab displays a list of users who have been added to the team. To the right of each team member's name and title, the **Message User** hyperlink in the **Actions** column enables users to message any team member directly from this screen.

The **Edit Team** hyperlink at the top of the screen enables the user to add, remove or update members of the team.

GROUPS

The **Groups** tab displays the group name and hospice physician of each group within the team. Select the hospice physician hyperlink for a direct link to their information in the People Center (*People/People Center*).

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Upcoming Agenda	Meetings	Team Members	Groups	Patients
Group Name			**Hospice Physician**	
M-Z Avenger			Christoper Cj	
A-L Avenger			Jean Santos	

Select the **Edit Team** hyperlink at the top of the page, then go to the **Groups** tab on the left to add, edit or remove groups.

PATIENTS

The **Patients** tab displays the patient's name, MRN, recertification date and group for each patient in the team. Patients are listed in descending order with the most urgent recertification date at the top of the list. A badge appears next to the patient's name to alert users of upcoming and past due recertifications dates:

- **Upcoming** - 15 to 30 days before recertification due date.
- **At Risk** - One to 14 day(s) before recertification due date.
- **Past Due** - Recertification due date has passed.

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Select the **Edit Team** hyperlink at the top of the page to edit the patients in this list. Users can also change an individual patient's care team from the Patient Profile.

RUNNING A MEETING

Go to the IDG Center and find the **Meetings** tab. Select the **Go to Meeting** hyperlink.

NOTE: To start an IDG meeting, a user must have permission to start meetings in their profile and be listed as an attendee for the meeting.

Once the meeting is ready to begin, select **Start Meeting** in the top-right corner. Users will see the meeting start date and meeting start time fields. The meeting start date and start time entered in these fields will be used on the IDG agenda for attendance. The start date must be a date that occurs after the previous meeting and cannot be a date in the future. Select the blue **Start Meeting** button and the meeting will start and the user attendance will be recorded. Once the meeting has started, other attendees can select **Join Meeting** to join and record their attendance.

Circle icons at the top of the IDG Meeting page with the ✔ icon shows attendees who are logged in to the meeting.

Select the **Manage Attendees** button to expand the section and to make updates to the attendee's section, including adding additional members.

Below the header, all patients on the meeting agenda are listed on the left-side menu. By default, the first patient on the agenda is selected and their IDG summary is displayed for review.

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Once the team is finished discussing the patient and documenting the discussion, selecting the green **Mark as Reviewed** button will identify the patient as reviewed, and a green checkmark will appear next to the patient's name on the left-side menu. The button will turn orange and say **Mark as Not Reviewed** to enable any additional last-minute discussion to be documented if necessary. Use the left-side menu to move to the next patient.
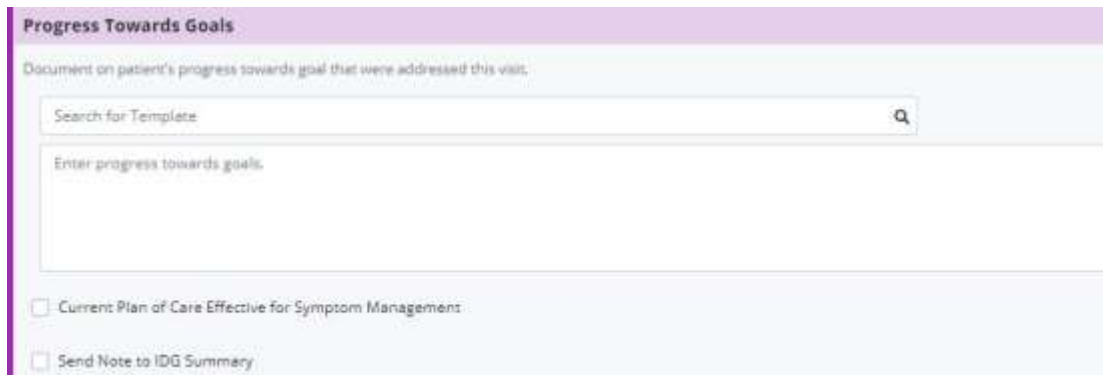

Summary/Comprehensive Assessment Update

The IDG Summary/Comprehensive Assessment Update enables progress towards goals to flow automatically from each clinical document to the IDG Summary/Comprehensive Assessment. Instead of allocating time to write IDG notes, clinicians can incorporate their routine visit documentation for each discipline into the Comprehensive Assessment automatically.

All changes to physician orders will automatically flow to the IDG Summary/Comprehensive Assessment, so the IDG team can review changes to the Plan of Care during IDG meetings. These include:

- Visit Frequencies
- Level of Care Changes
- Medication Changes
- Plan of Care Problems/Goals/Interventions Changes
- Other Changes from Physicians Orders

The **Progress Towards Goals** section of each clinical document enables clinicians to copy goals from the Plan of Care Profile and document the patient's progress toward each goal.

- Select the **Current Plan of Care Effective for Symptom Management** box to include as part or all the discipline's IDG update on the visit.
- Select the **Send Note to IDG Summary** box to send the **Progress Toward Goals** section of the clinical note to the IDG Summary/Comprehensive Assessment.

In some documents (including admission and recertification nursing assessments), the admission/recertification narrative and care coordination narrative documentation can be sent to the IDG Summary/Comprehensive Assessment Update.

If a clinician chooses not to check the **Send Note to IDG Summary** box, the IDG Summary/Comprehensive Assessment Update can be documented manually in the IDG Center. A user who has not had a visit with the patient in two weeks should update the IDG note manually in the IDG Center.

IDG Meeting Details - At the top of the meeting, hovering over the expanding **Quick Links** hyperlink enables users to preserve work in the IDG note while

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viewing the Patient Chart, Patient Schedule, Medication Profile, Plan of Care or adding a new Frequency or Diagnosis physician order in a new tab. Select the **Show Details** button to see the full tile seen in the patient chart. The **Plan of Care Profile** and **Review Medication Profile** buttons provide easy access to other parts of the patient's chart before and after the IDG meeting.

Discipline Frequencies - The visit frequencies for all ordered disciplines auto-populates from the most recent frequency orders.
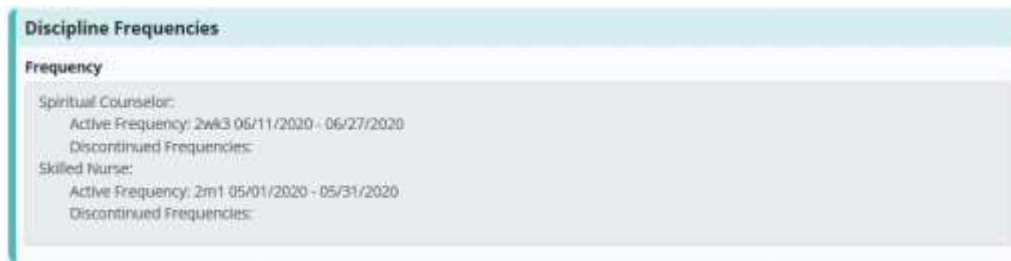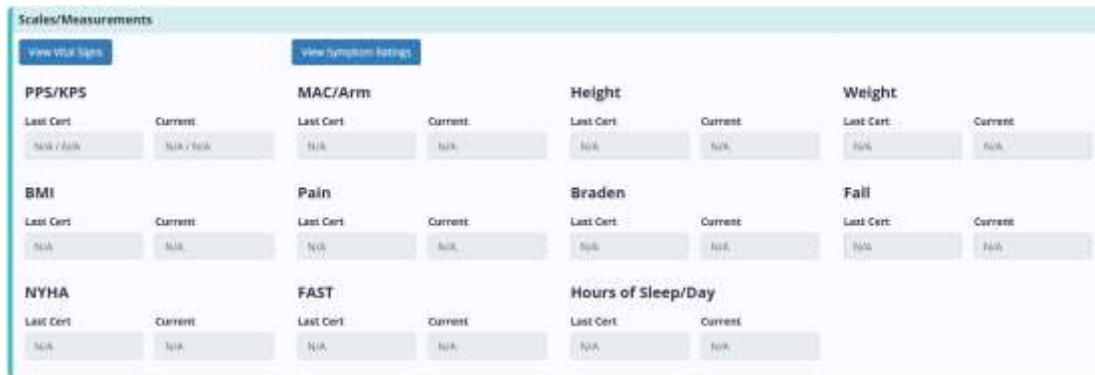

New Orders/Plan of Care Updates Since Last IDG Meeting - Shows any orders made since the last IDG meeting took place. Select the **Remove** button to delete any orders.

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Scales/Measurements - Scales and measurements automatically populate from the most recent certification assessment (RN Initial/Comprehensive Assessment or RN Recertification Assessment) for comparison to the most recent skilled nursing visit. This data enables the IDG team to easily track declines in status throughout the benefit period.

- The PPS/KPS, MAC/Arm, Height, Weight, BMI, NYHA and FAST scores flow from the **Vital Signs/Additional Measurements** sections of the nursing visit notes.
- The Braden and Fall scores come from the **Integumentary** and **Functional** sections of the nursing visit notes.
- The Pain score shows the patient's most recent pain score from the verbal or non-verbal scale and the patient's worst pain score since the last skilled nurse visit.

Select the **View Vital Signs** or View **Symptom Ratings** buttons to view logs of all the patient's vital signs and symptom ratings taken for the last 90 days.
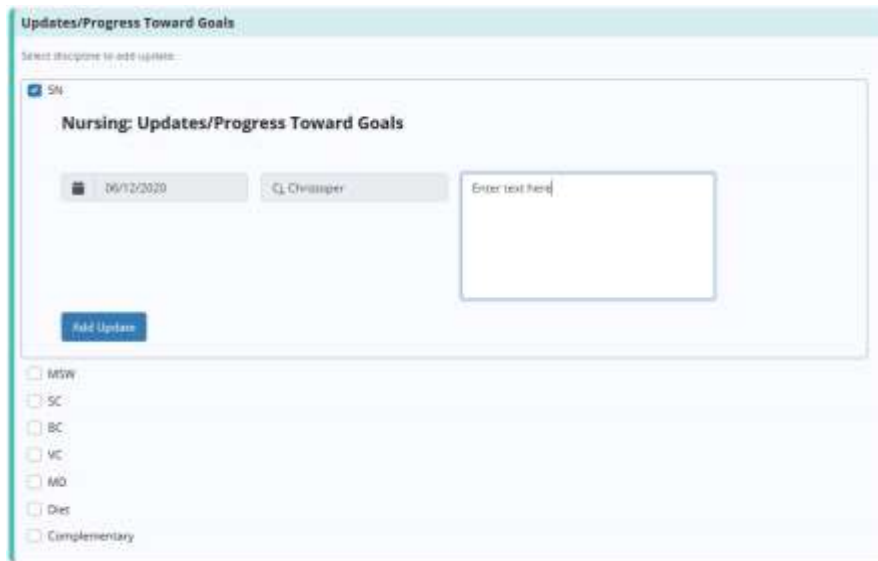
Updates/Progress Toward Goals - Updates and progress toward goals flow from the clinical documents into this section.

If the clinician selects Send Note to IDG:
The information will flow into this area with the date of the visit note and the clinician who documented the update. The update can be edited by the clinician who entered it and new updates can be manually entered if necessary.

If the clinician does not select Send Note to IDG:
Users can select disciplines here to add notes manually by entering text and selecting the **Add Update** button.

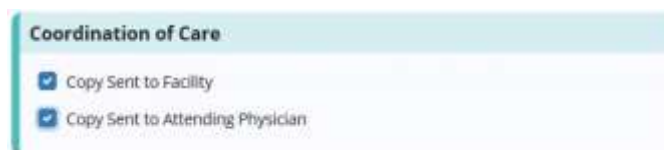**IDG Discussion** - Here, users can document discussions during the IDG meeting in the free text box or use a templated option. Any user who has joined the meeting can document in this section. Users can select the patient, family/caregiver and/or facility staff checkboxes to document their involvement in developing the POC as needed. Enter the name(s) of collaborator(s) after selecting the checkbox(es).

Coordination of Care - Care coordination between the hospice IDG, attending physician, and nursing care/residential facilities can be documented in the Care Coordination section.

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END MEETING

Once all patients on the agenda have been discussed and marked as reviewed, green check marks will appear on each section of the agenda.

Select the purple **End Meeting** button to end the meeting and create the next meeting, agenda and IDG summaries. You will be prompted to confirm the next meeting date and time, which will default according to your team's meeting schedule but can be edited as needed.

The system will facilitate your compliance by ensuring patients are discussed at least every 15 days.

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NOTE: To help comply with CMS requirements, a meeting cannot be ended until all core team members have signed in to attend the meeting (change from red to green stars). Core members include the registered nurse, social worker, counselor and hospice physician.

The IDG meeting 15-Day Compliance toggle in Company Setup (user must have permission to edit company information) enables organizations to select the level of compliance they want in their IDG meeting processes. When enabled, users cannot end IDG meetings or remove patients from a meeting if it will cause the patient to be out of compliance with CMS regulations, which requires an update to the comprehensive assessment at least every 15 days.
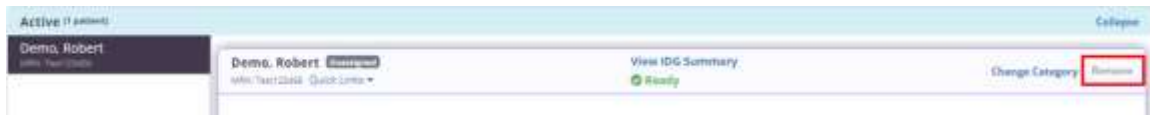
By default, these hard stops are disabled. When 15-day compliance is disabled, a warning message will notify users when they are exceeding the 15-day limit by removing patients or ending an IDG meeting, but users can proceed after acknowledging the warning.

Below the next meeting date/time and IDG compliance, users will need to enter the current meeting end date and meeting end time. Then select **End Meeting** at the bottom of the page. The meeting end time cannot be prior to the meeting start time. When this occurs, users will receive a message indicating the dates must be corrected. Once the end date is selected and the meeting has ended, subsequent IDG meetings will use the selected end time for meeting time frames.

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HELP CENTER

A great resource that is available 24/7 is our Help Center. It is a place to get answers to frequently asked questions or watch videos on all our Axxess products. To access the Help Center, navigate to the **Help** tab and select **Help Center** or go to https://www.axxess.com/help/.

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