

- Dashboards provide an overview of pertinent information to monitor activity throughout the Home.
- Each Home should designate a group to be responsible for specific panes. Layouts and Dashboard content are role-specific, designed to best suit the needs for that role.
- Reports are built into the Dashboard.
- When information is cleared from the Dashboard, it remains available through reports.

Missing Chart Components

- **Missing Entries Report** (photos, allergies, diagnoses, care plans, care plan reviews, immunizations, progress notes, baseline weights & vitals, other weights and vitals)

Tasks

- Review to ensure mandatory Tasks are included on each chart
 - Custom Tasks should not be redundant (e.g., 4P/5P Rounding) with Standard Tasks
 - Avoid duplication with EMAR Orders
- Ensure Tasks are clear, accurate, and set to the correct frequency for POC documentation
- From the resident chart (under Task tab – upper right corner) **Care Record; Task List Report**
- **Reports: Care Plan Item/Task Listing**

POC Documentation

- Audit missing or late/off schedule Tasks (up to one week at a time; never include current day)
- Task documentation is often done in ‘batches’ especially for restraint checks
- Monitor all Tasks or select one specific Task
- Click on ? beside the Task in a resident chart to view documentation history (up to 30 days) - hover over checkmark to see who documented
- **Reports: POC Audit Report; Response Rate Report; Follow-up Question Report; Look Back Report** (include legend); **Documentation Survey Report V2** (for one resident)
- **POC Documentation Compliance Report** – caution interpreting results (one Task can be documented multiple times that could disguise missing data for other Tasks not documented)

Orders

(use the Orders Portal under Clinical Tab – clear the date from the ‘order date after’ field)

- Review all current orders to ensure they are still valid
- Ensure all discharged residents have NO active orders
- Ensure that orders are clear and accurate for EMAR documentation (avoid duplication with POC Tasks)
- Click the blue triangle on the Dashboard and clear the alerts for Orders on Hold > 30 Days or Requiring Reassessment
- **Reports: Order Listing Report; Order Summary Report; Order Recap Report; Administration Record Report; Diet Type Report**

EMAR Documentation

- Audit missing or late treatment order administration
 - Default is set to all, but able to select one staff member or group of professionals
 - **Reports: Medication Admin Audit Report**
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Alerts

- Review and action (establish process)
- Ensure alerts have been dealt with properly (track follow-up documentation)
- Clear as appropriate (clearing for one user will remove from Dashboard, but accessible via reports)
- **Reports: Alert Audit Report; Alert Listing Report** (select simple/complex or both, select 'include cleared alerts')
- Name notifications should be entered under 'preferred name' and 'special instructions' (they do not function the same as clinical alerts)

Progress Notes

- Review quality of content
- 'Nursing' type currently includes RN/LPN/RCW documentation (may separate RCW notes prior to myHealthPEI integration when information will be available to Island citizens)
- **Reports: Progress Notes NEW**

Assessments

(use UDA Portal under Clinical Tab)

- Check
 - Duplicates
 - Left in progress
 - Behind schedule
 - Cleared/de-activated
- VAT should be done upon return from leave (not just on admission or incident) and higher risk should be noted in Special Instructions (under Care Profile)
- **Reports: Assessment Schedule Audit Report; Assessment Schedule Cancellations Report; Assessment History Report; Assessment Scoring Report; Resident Response Analyzer; Resident Response Comparison (one resident)**

Care Plans

- Pre-Admission Review Assessment is the basis of the Care Plan
- Check comprehensiveness and clarity (Focus – Goal – Intervention)
 - 'Safety Plan' refers to official document developed with OH&S and 'Monitoring & Safety' Focus refers to risk mitigation measures (e.g., sitting up while eating)
- Ensure the Kardex is up-to-date and reflects current state
- Verify date(s) for Goal achievement
- Verify date for Care Plan reviews
- **Reports: Care Plan Report** (include Tasks, Revision History); **Care Plan Item/Task Listing Report; Kardex (Care Plans/Tasks)** – choose 1 of 3 format options
- **Care Plan Reviews Due Report**
- Other Reports will be relevant when the InterRAI LTCF is introduced (more to come)

PointClickCare

Ohio River Assisted Living

?

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pcc-addysh

Home

Billing

Care Services

QIA

GL AP

Insights

CRM

Reports

Search report titles and descriptions

🔍

RECENT

ALL

ENHANCED

BILLING

CARE SERVICES

Sub Modules

☐ Activities Listing

☐ ADT / Profiles

☐ Assessments

☐ Behaviors and Side Effects

☐ Billing

☐ Collections

☐ Conversion

☐ Decision Support Intervention

☐ eMAR

☐ General Clinical

☐ General Clinical Reports

☐ Infection Control

☐ Letters

☐ Marketing

☐ Point of Care

☐ Referrals

☐ Results

24 Hr. Summary

Save Settings

Summarizes resident information that occurred in the last 24 hours. For example, Progress Notes, Vitals, Immunizations and ADT.

A/R Aging *NEW*

Save Settings

Compiles balances by resident and Payer. Select A/R Aging to review outstanding balances and Cash Aging to reconcile payments with the Cash Receipts Journal.

A/R Goal Report

Save Settings

Measures collections within a facility to determine the amount of funds in A/R calculated against the collection goals of the organization. Use this report to validate Days Sales Outstanding (DSO).

Action Summary Report (Billing - ADT / Profiles)

Save Settings

Summarizes resident movement including admissions, discharges, deaths, leaves of absence, and transfers. Details populate based on the Action Codes used in the resident census lines.

Action Summary Report (Care Services - ADT / Profiles)

Save Settings

Summarizes resident movement including admissions, discharges, deaths, leaves of absence, and transfers. Details populate based on the Action Codes used in the resident census lines.

HIDE DESCRIPTION

Action Summary Report (Billing - ADT / Profiles)

Save Settings

RUN REPORT

Description

Summarizes resident movement including admissions, discharges, deaths, leaves of absence, and transfers. Details populate based on the Action Codes used in the resident census lines.

Use this report to verify Go Live Census Lines and ensure all census lines are complete before month end close.

You can specify Date Range and Payer/Payer Type and include comments typed in the census entry.

Item Number	Item Name	Description
1.	Reports	Opens the Reports tab.
2.	Search	Locate reports by searching all report names, modules, sub modules, keywords, and report descriptions.
3.	Module	Lists all reports available for a specific module. Click Recent to open reports you ran in the last 60 days.
4.	Sub Modules	Filters the list of reports based on report type.
5.	Description toggle	Hide or show a short report description in the center pane of the reports page. Hide descriptions to see more reports in the list.
6.	Save Settings	Enhanced reports allow you to save parameters to repeat.
7.	Description	Provides a detailed explanation of the report including hints, tips, and definitions.
8.	Run Report	Click Run Report or click the report name to specify the options and parameters for the selected report.