Thornberry

Managing Employee Dashboard Settings

Overview

The Employee Dashboard is a tool designed to provide clinicians with information related to their assigned patients, scheduled tasks, missing or overdue charting, visits, a current patient list, and when applicable listings related to assigned contacts and bereavement activities. The Employee Dashboard display can be customized based on the settings described as follows.

Employee Dashboard Settings Page

The settings below are accessible via Administration>System>Settings and provide agencies the ability to control the reminders for the specific dashboard options listed, including Risk/Alerts, To Do: Due/Overdue, To Do: Coming Due, New Activity: Change Orders, New Patient Activity, Bereavement: To Do, Late EA Charting, and Scheduled by Other.

Add/Change

This is the main dashboard settings page for the sections detailed below.

Risk/Alerts

This section relates to controls for the Risk/Alerts dashboard.

Decline in Clinical Status: *Omit alerts for Hospice patients?: Y/N* – For those agencies that provide hospice services, these alerts may be cumbersome for certain patients, so this option will control whether these alerts are generated. As noted, this setting will also control the Decline in Clinical Status Report (under Reports>QA).

Clinical Alerts:

- *Clinical Alerts: Only include Pain alert if the 'Current Pain Level' is higher than:* ___X____ ***OR***
- *Clinical Alerts: Include Pain alert only when the 'Current Pain Level' is higher than the 'Pain Goal Level': Yes/ No*

In this case, the settings allow agencies to filter out Pain Alerts either by designating a Pain Level Range (i.e., higher than designated pain level number) or by selecting Yes to only include alerts if the pain level is higher than the patient’s goal. Note: these settings also control what is displayed within the Patient Summary>Problem List - Clinical Alerts.

Risk for Hospitalization:

- *Risk for Hospitalization: Include alert when the Score is higher than:* ___X_____
- *Risk for Hospitalization: Include alert if patient has problem “risk for hospitalization” triggered?: Yes/ No*
- *Risk for Hospitalization: Include alert if patient is identified as a risk for hospitalization by third party?: Yes/ No*

In this case, agencies can determine the logic applied to whether this reminder displays within the Risk/Alerts section. Further details can be found under the Managing Patient Status and Special Patient Classifications (Priority Code, TAL, Risk for Hospitalization) section within the sub-header for Risk for Hospitalization.

Due/Overdue & Coming Due

This section relates to controls for the To Do: Due/Overdue and To Do: Coming Due dashboards.

General Reminders:

- *Do not include 485s, OASIS assessments and Visit reminders that are more than* _X_ *days past due.*

- *Do not include Missed Visit reminders that are more than _X_ days past due.* Note: The maximum number allowed is 25 days. If the agency prefers not to see any reminders, then enter 0.
- *Should the Case Manager be the patient's current Case Manager?: Yes/ No* Note: This setting controls if an agency wants the current Case Manager to be the responsible clinician for missing OASIS assessments and POC documents. If no, then the responsible clinician is the patient's Case Manager at the time of the due date of the missing documentation.

Authorizations:

- Omit Insurance Authorization Warnings*?: Yes/No:* Insurance authorizations can be managed via a report. As such, agencies may wish to omit these from the dashboard reminders and instead have in-office staff track these via the reporting tools.
- *Insurance Authorization Warnings: Do not include discharged patients that have been discharged for more than _X_ days.* Note: This field may be left blank to include all discharged patients. To include no discharged patients, agencies can enter a value of 0 (zero).
- *Unauthorized Visits Warning: Do not include discharged patients that have been discharged for more than _X_ days.* Note: This setting applies to unauthorized visit messages for both insurance authorization and discipline frequency. The field may be left blank to include all discharged patients. To include no discharged patients, agencies can enter a value of 0 (zero).

485/POC Documents – Non-Required Documents:

- *485s: Include non-required incomplete 485s?: Yes/No:* This setting only applies to 485 (Plans of Care/POC) documents that are created for patients that do not require a POC. The incomplete status relates to the documents not being removed and not having final approval.
- *Earliest due date for which these 485s should appear.* This setting applies to the earliest date that the non-required/incomplete POC documents should appear on the dashboard.

OASIS Assessments:

- *OASIS: Include non-required incomplete OASIS assessments?: Yes/No:* This setting only applies to OASIS assessments that are created for patients that do not require an OASIS assessment. The incomplete status relates to the assessment not being deleted and awaiting completion.
- *Earliest due date for which these assessments should appear:* This setting applies to the earliest date that the non-required/incomplete assessments should appear on the dashboard.

Non-Skilled Care Plan:

- *Non-Skilled Care Plan: Include 'Due' and 'Coming Due' reminders?: Yes/ No:* This setting simply controls if reminders are to display for Non-Skilled Care Plans in either the Due/Overdue or Coming Due sections of the dashboard.

Hospice Medicare Part D:

- *Hospice: Include 'Medicare Part D' medications with no authorization dates?: Yes/ No*: This setting simply controls if reminders are to display for medications charted as having Medicare Part D responsibility that do not have an authorization date charted.

SMART Goals Reminders:

- *Due Dates Include Outcomes/Goals Coming Due and Past Due reminders for the following discipline(s):* This setting allows agencies to determine which discipline(s) an agency wants to receive reminders for Outcome Goals appearing as coming due or past due. If an agency does not wish to have any reminders set up, then they should not select any discipline(s). If a discipline is selected and an employee is assigned to the patient via Patient Disciplines, then that employee will see the reminders. If the employee is assigned to the patient via Assign Patient and the employee has a team in the Employee Table that is linked to a selected discipline, then the employee will see the reminders.

- *Do not include Outcomes/Goals Past Due reminders that are more than _X_ days past due.* This setting controls the maximum number of days past due for which to see the past due reminders. The maximum is 25 days.

485/POC Due Dates:

- *Homecare 485s: SOC 485s are due _X_ days after the SOC date.* This setting controls the number of days after the patient's SOC the agency wants to start seeing reminders of incomplete homecare/home health SOC POCs. Note: This does not affect the auto creation of POC documents as configured under Administration>System>Settings>Plan of Care. However, if this setting is not defined, then the auto create setting under the POC settings will be used for the dashboard logic and the Patient Tracking Report.
- *Homecare 485s: Recert 485s are due _X_ days prior to episode start date.* This setting controls the number of days prior to the episode start date that the agency wants to start seeing reminders of incomplete homecare/home health recert POCs. Note: This setting is only for the dashboard and the Patient Tracking Report. This does not affect the auto creation of POC documents as configured under Administration>System>Settings>Plan of Care. However, if this setting is not defined, then the auto create setting under the POC settings will be used for the dashboard logic and the Patient Tracking Report.
- *Hospice 485s: Recert 485s are due _X_ days prior to episode start date.* This setting controls the number of days prior to the episode start date that the agency wants to start seeing reminders of incomplete hospice recert POCs. Note: This setting is only for the dashboard and the Patient Tracking Report. This does not affect the auto creation of POC documents as configured under Administration>System>Settings>Plan of Care. However, if this setting is not defined, then the auto create setting under the POC settings will be used for the dashboard logic and the Patient Tracking Report.
- *Peds 485s: Recert 485s are due _X_ days prior to episode start date.* This setting controls the number of days prior to the episode start date that the agency wants to start seeing reminders of incomplete peds recert POCs. Note: This setting is only for the dashboard and the Patient Tracking Report. This does not affect the auto creation of POC documents as configured under Administration>System>Settings>Plan of Care. However, if this setting is not defined, then the auto create setting under the POC settings will be used for the dashboard logic and the Patient Tracking Report.

New Activity: Change Orders

- *Maximum number of days when the Med/Order was added or modified: _X_ days:* This setting designates the maximum number of days to display new/modified meds and orders and will trigger the remove from this section of the dashboard upon reaching the designated date.
- *Only display changed Meds/Orders if charted by someone other than the employee who is viewing the dashboard?: Yes/No:* Note: Agencies should set this to Yes to only display new/modified meds and orders charted by someone other than the employee viewing the dashboard and will filter out any charting for the patient by the employee viewing their own dashboard.

New Patient Activity

- *Maximum number of days when the Patient Activity was added or modified: _X_ days:* This setting designates the maximum number of days to display new/modified Patient Activity entries and will trigger the remove from this section of the dashboard upon reaching the designated date.

Bereavement: To Do

- *Do not include reminders that are more than _X_ days past due:* This setting controls the maximum number of days past due for which to see the past due reminders.

Late EA Charting

- *EA Activity entered (for self) less than _X_ hour(s) prior to Activity Start Time will be identified as Late EA Activity.* This setting simply controls the number of hours prior to an activity that scheduling by the user will be designated as late employee activity.
- *EA Activity entered (for others) less than _X_ hour(s) prior to Activity Start Time will be identified as Late EA Activity.* This setting simply controls the number of hours prior to an activity that scheduling by another user will be designated as late employee activity.

Scheduled by Other

- *EA Activities entered by someone other than employee should go to 'Scheduled by Other?: Yes/ No:* This setting controls how users will see scheduled activities. Agencies should select Yes if all scheduled activities charted for other users should appear in this section of the dashboard. Alternatively, agencies can use the Scheduled by Other settings described below to select which user type(s) are applicable. If an agency does not want to have alerts generated, select No in this option and do not set up any user types in the Scheduled by Other settings described below.

Scheduled by Other Settings

This page correlates with the Scheduled by Other setting described above. In this option, agencies can select a user type whose charting is then set up for the selected user type(s) in the column on the right. To select multiple user types to whom scheduling dashboard reminders will be sent, use the CTRL key to select.

Resources

For additional details on how manage the Employee Dashboard please refer to the NDoc FASTForm for Employee Dashboards and the Employee Dashboard reference documents listed below:

- Employee Dashboard Screens
- Employee Dashboard Terms
- Employee Dashboard Timeline