Managing Supervisory Visit Settings
(Patient and Employee Supervisions)

Supervisory Visit Compliance Overview

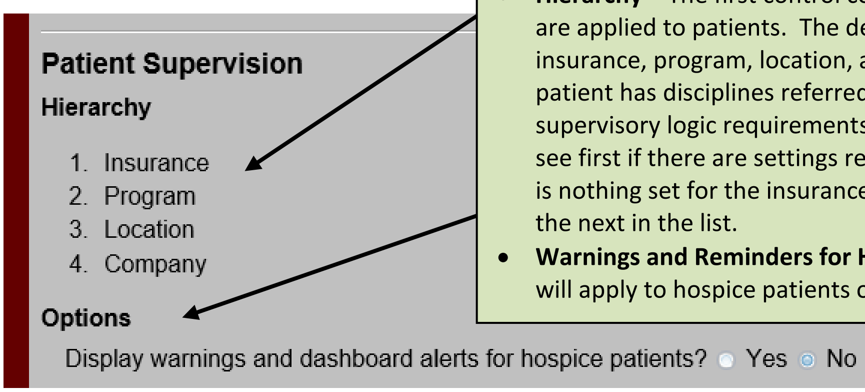
NDoc allows agencies to chart and track supervisory visits for the purposes of staying compliant with supervision of individual patient care, as well as individual employee supervision mandates (i.e., supervision of employees independent of a particular patient). Specifically, the two components of this functionality are as follows:

- **Patient Supervision:** Documentation and tracking of supervision of an individual's patient care to comply with agency/regulatory requirements. These visits are tracked by patient based on assigned disciplines.
- **Employee Supervision:** Documentation and tracking of supervision of employees and their performance of care tasks based on agency or regulatory requirements. This would include the annual on-site supervision visit as dictated in the Conditions of Participation for Home Health Aide Services under § 484.80(h)(1)(iii). In this case, the supervision involves an assessment of the aide's performance.

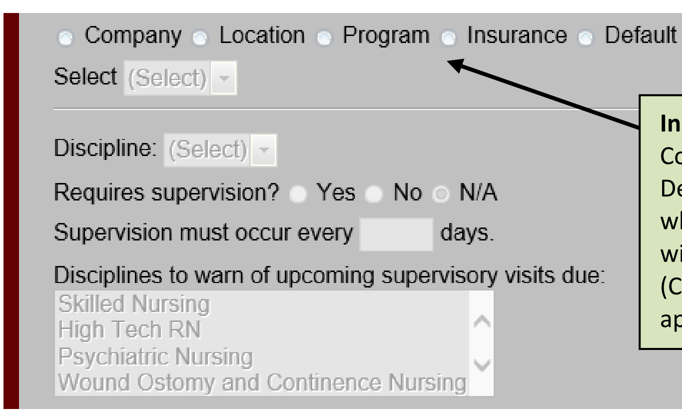
Supervisory Visit Settings

Patient Supervision Settings:

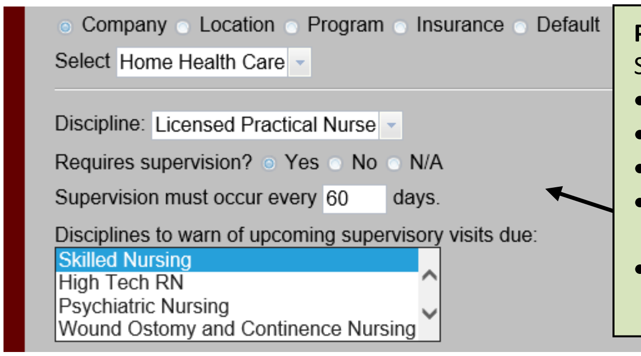
Go to Administration>System> Settings>Supervisory Visit Settings:



- **Hierarchy –** The first control covers the hierarchy of how the settings are applied to patients. The default hierarchy is set to look first at insurance, program, location, and then company. Therefore, when a patient has disciplines referred, the system checks if there are any supervisory logic requirements set for that discipline and then looks to see first if there are settings related to each of these elements. If there is nothing set for the insurance, then it looks at program, and then to the next in the list.
- **Warnings and Reminders for Hospice** – Agencies can determine if this will apply to hospice patients or not.



Individual Supervisory Requirements: This section lists Company, Location, Program, Insurance, and Default. The Default setting option can be set up to cover those situations where there are no specific settings configured for the others within the hierarchy. To set requirements for the others (Company, Location, Program and Insurance), click the applicable radio button for each and follow the prompts.

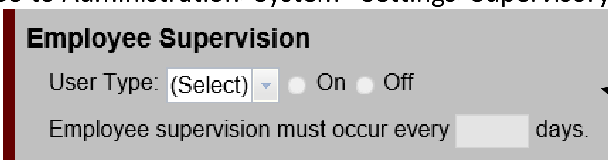


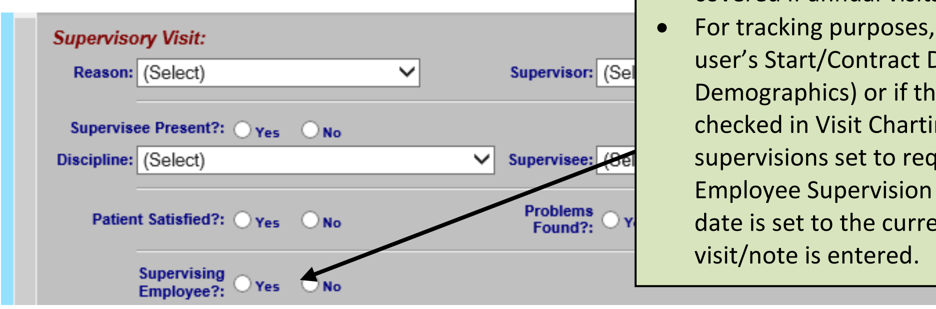
Patient Supervision Setting Example: To set a requirement for LPN Supervisory Visits every 60 days by company, follow these steps:

- Click **Company** and select the appropriate option
- Select the LPN discipline (if applicable for your agency)
- Choose **Yes** for Requires supervision? Y/N/NA
- Enter **60** for the number of days for *Supervision must occur every __ days*.
- Choose the discipline(s) applicable to *Disciplines to warn of upcoming supervisory visits due.*

Employee Supervision Settings:

Go to Administration>System> Settings>Supervisory Visit Settings:





Employee Supervision Setting:

- These settings are based on User Type (***not Discipline***).
- In order to set the requirement of annual visits, select the user type and enter 365 for the number of days to be covered if annual visits are required.
- For tracking purposes, the logic for tracking is based on a user's Start/Contract Date (entered in Employee Demographics) or if the Supervising **Employee?-Y/N** field is checked in Visit Charting. If the employee's user type has supervisions set to required, but there is no existing Employee Supervision date or Start/Contract Date, the due date is set to the current date until an Employee Supervision visit/note is entered.

Report of Settings:

To see the settings configured for either Patient or Employee Supervisions, users can click the printer 🖶 icon in the top right corner of the options page to produce a PDF report of all of the selected options.

Supervisory Visit Related Tables

In the course of charting Supervisory Visits either via the Visit Charting screens or within the Employee Supervisions function, there are assessment checkboxes that can be used to complete a supervisory assessment. These options can be configured via the Supervisory Assessments Checklist under Administration>System>Tables. Note settings are automatically set up for Aide related items. Agencies can retain these or set up new items.

Supervisory Visit Resources

For additional details on how the supervisory visit process is managed on the clinical side, please refer to the **NDoc FASTForm for Supervisory Visit Functionality (Patient & Employee Supervision).**