Managerial Checklist – Hospice Clinical Supervisor

Use this checklist as a guide on areas to monitor – to ensure the agency is operating successfully at go-live

Deficiency WQs: Monitor for unusual volumes and follow up with owners

Workqueue Name	Workqueue Function	Action Needed	Supervisor	Frequency
TMCAH HH/HSPC Declined Orders	Shows orders that providers declined to sign	Follow up with clinician for issue with order content, or intake for issue with wrong provider		Daily
Discharge Alive – Send Summary	Captures patients discharged alive	Send discharge summary to responsible provider		Daily
Election Addendum – Review Needed; Election Addendum – Ready for Delivery; Election Addendum – Out for Delivery	Captures patients who have requested the hospice election addendum and need review/action for delivery by the CMS-mandates timeframe	Confirm all necessary info is in addendum; print and arrange delivery to patient; scan signed document into Epic		Daily
HH/HSPC Medication Review	Review med orders to ensure they should be sent to the physician	Review the order and determine if it needs to be sent		Daily

Account WQs: Monitor for unusual volumes and follow up with owners

Workqueue Name	Workqueue Function	Action Needed	Supervisor	Frequency
HHF-HSPC – DNB – Clinical	Stops accounts from billing until clinical-owned requirements are complete	Follow instructions in DNB error message		Daily

Claim Edit WQs: Monitor for unusual volumes and follow-up with owners

Workqueue Name	Workqueue Function	Action Needed	Supervisor	Frequency
HSPC – Clinical Errors	Stops claims from being sent until clinical-owned requirements are complete	Follow claim edit instructions		Daily

In Basket Messages: Monitor daily; All Clinicians are responsible for the following In Basket Messages

In Basket Message Group	Messaging Description	Action Needed
Staff Messages	Shows messages sent directly to you	Take action/reply to sender as needed

Open Encounters	Shows system-generated messages to remind you to close open encounters; particularly when documenting clinical calls, remember to sign and close encounters if documentation is complete	Complete documentation, close encounter, and sync

Dashboards: Monitor on frequencies specified below and follow up with responsible staff; Reporting Content Guides contain details of the components contained within each Dashboard

Dashboard Name	Dashboard Function	Owner	Frequency
Hospice Clinical Supervisor Dashboard	Track key clinical documentation and regulatory requirements, including indicators of completion and quality of documentation	Clinical Supervisor	Daily
Hospice Quality Review Dashboard	Shows patients coming due for IDG for initial, follow-up, and discharge review	Clinical Supervisor	Weekly
Home Care Clinician Productivity Dashboard	Shows amount of activity by clinician, based on weighted visit counts	Clinical Supervisor	Weekly
HH/HSPC Scheduling Dashboard	Tracks key scheduling metrics, including workqueue volumes and recent/upcoming appointments	Scheduling Supervisor	Ad hoc
Order Follow-Up Reporting Home	Tracks order turnaround time, unsigned orders per provider, and declined orders by provider	Office Support Manager	Ad hoc
Hospice Intake User Reporting Home	Shows referral workqueue volumes and other metrics related to referrals and intake	Intake Manager	Ad hoc

Steps for Saving a Private Report:

1. Navigate to My Reports from the Epic Button.
   Epic -> Reports -> My Reports
2. Search for the report in the Library.
3. Edit the Report Settings.
4. Find your Criteria in the Criteria Tab and add desired criteria.
5. Click Save As and Rename the Report with your Initials as the prefix and any other descriptive information.
6. Favorite this report by clicking the Start next to the Report name.