

## HOME HEALTH AIDE ASSIGNMENT

### SUMMARY

Home Health Aide assignments are made via an electronic **Telephony Care Plan**. The electronic Telephony Care Plan/assignment is accessible via the telephony call made by the Home Health Aide. The electronic assignment can also be printed. The printed electronic assignment is called the **Telephony Care Plan Worksheet**. When Home Health Aide services are ordered, the electronic assignment will be made by the admitting nurse/nurse care coordinator and updated a minimum of every 60 days and as needed. The **Telephony Care Plan Worksheet** will be printed and signed by the author. The worksheet will be taken to the patient's home in order for the patient and caregivers to know the tasks assigned. Follow these instructions to electronically assign tasks to be performed by the Home Health Aide and to print and use the Telephony Care Plan Worksheet.

### ROLES

The Nurse Care Coordinator/designee is responsible for assigning care to the Home Health Aide using the electronic **Telephony Care Plan**. Once the Telephony Care Plan is created or updated, the care plan will be printed and taken to the home by any staff when the next home visit is made.

### OVERVIEW

1. Home Health Aides are to do ONLY those activities assigned by the Registered Nurse (RN) as part of the patient's overall plan of care.
2. The Home Health Aide assignment and changes to the assignment can only be made by the RN.
3. Assigned tasks should be patient specific and based on the needs of the patient.
4. Assigned care will be given at each visit unless the task is designated, 'Per Patient Request'.
5. Do not assign 'Per Patient Request' tasks if the patient never allows the task to be completed. Do not assign to patients with documented forgetfulness or dementia. Do not assign if patient has documented altered mental status.
6. The patient's care manager will monitor Home Health Aide documentation, any completed Case Communication/Code 500 Reports and any information received during the patient's case conference to make appropriate changes to the Home Health Aide assignment.
7. The Home Health Aide assignment should be updated a minimum of every 60 days and more often as needed.

## PROCESS

### Creating the Telephony Admission Note

1. Create the **Telephony Admission Note**, prior to creating the Telephony Care Plan.
2. The Telephony Admission Note adds additional clinical and demographic information to the Telephony Care Plan Worksheet.
3. All Telephony Admission Notes created for an admission will populate to the Telephony Care Plan Worksheet.
  - **Never complete the original Telephony Admission Note.** The Telephony Admission Note will be left 'incomplete' and we will reuse the note each time to add changed information to the worksheet.
4. The Telephony Admission Note is created from **Notes**.
5. With the patient's name highlighted in the tree view of Clinical Explorer, click on **Notes**.
6. The Notes screen is displayed with header information at the top.
7. In the **Category box**, use the drop down menu to select **Admission Note**.
  - When the **Admission Note** is selected, all prior Admission Notes including the Telephony Care Plan Notes and the Telephony Admission Note will be displayed in the bottom of Notes screen.
  - If this is a new admission, there will not be a Telephony Admission Note or any Telephony Care Plan Notes.
8. If this is a new admission and a **Telephony Admission Note** has not been created, select **Add**.
9. The **Add Note** screen will be displayed. Complete as follows:
  - Leave the **Follow Up** section blank.
  - **Note Type:** Search for and select **TZ, Telephony Admission Note**.
  - **Text:** Click into the text box and hit F10 on the keyboard.
  - The **Library Text** screen is displayed.
  - At the bottom of the list on the left side, highlight **TCN ADD HH, Telephony Admission Note Home Health** and click the **Add Item** button.
    - The text is added to the **Text Preview** box on the right side.
  - Complete the text item placeholders (**.....**) by clicking into the place holders in the Text Preview box and typing the requested information. Remove the placeholders.
  - Make sure that vital sign ranges are entered and any other special instructions as needed by the Home Health Aide.

- Mark CPR: Yes X, if there is **NOT** a “Do not resuscitate” order from the MD.
  - Mark CPR: No...X, if there is a “Do not resuscitate” order in the medical record.
  - Click **OK** when text items are completed.
  - The edited library text items will now be displayed in the **Text** box of the note.
  - Review the note for accuracy and click **OK. DO NOT COMPLETE THE NOTE.**
10. If the Telephony Admission Note is completed in error then the document can be ‘uncompleted’ by the Supervisor in Document Status Utility.
    - Always ‘uncomplete’ the note instead of creating an additional note.
    - All Telephony Admission Notes will print on the Telephony Assignment.
    - If multiple Telephony Admission notes are created, then the assignment sheet will be confusing and lengthy.
  11. If a **Telephony Admission Note** has already been created, highlight the original **Telephony Admission Note** that is displayed and select **Edit**.
  12. To **Edit** a prior **Telephony Admission Note**:
    - In the **Text** box, delete the old information by highlighting the unwanted information and clicking delete on the keyboard or by placing the cursor in front of the unwanted text and clicking on the delete button on the keyboard.
    - Complete the text box with the desired information, making sure to leave the set library text template.
    - Make sure that vital sign ranges are entered and any other special instructions as needed by the Home Health Aide.
    - When finished, click **OK**.
  13. The Telephony Admission Note prints at the beginning of the care plan worksheet as additional information for the Home Health Aide.

### **Creating the Telephony Care Plan**

1. The **Telephony Care Plan** is created from **Clinical Explorer**.
  - The **Telephony Care Plan** can be created on the laptop but the worksheet will have to be printed when connected to the **Network** or from a desktop computer.
2. Add the patient by episode to the visit tree in Clinical Explorer.
3. Select the case by **highlighting** the patient name.
4. Select **Go, Telephony Care Plan**.
5. The Telephony Care Plan window is displayed with two distinct sides.
  - The left side lists all the available Telephony tasks by number and descriptor.

- The right side is where the Service Type and Service are defined and where tasks are assigned on the **Telephony Task** grid.
6. Set **Service Type** by clicking on the drop down arrow: Choose **AE** for the Home Health Aide.
  7. Set **Service** by clicking on the drop down arrow: Choose **AE Service** for the Home Health Aide.
  8. The **Telephony Task grid** contains the following columns:
    - **Tel ID**, Identifies the Task ID.
    - **ID**, Identifies the Task Code.
    - **Res?**, (**Response**) Identifies if the task requires a numeric response recorded such as entering a temperature.
      - Most tasks are defaulted to **Yes** that requires a numeric response.
    - **D/T?**, Identifies if a task requires a date and time recorded.
    - **Description**, Gives a description of the task.
  9. The Home Health Aide tasks to be assigned start in the 500 series Telephony ID codes.
  10. Scroll down the list on the left side to locate the 500 series Telephony ID codes or click on **Import Template**.
  11. When **Import Template** is clicked, all of the task codes designated for the **Service Type** chosen will populate to the **Selected Telephony Task** grid.
    - Review the tasks and remove the tasks that are not applicable by **highlighting** the task or group of tasks and clicking on the **single left arrow**.
    - Removing non-applicable tasks may be quicker than assigning individuals tasks.
  12. To assign tasks on the **Telephony Care Plan Worksheet** not using the Import Template button, highlight the task or tasks to be assigned and click on the single right arrow to move the tasks to the assignment.
    - The double right arrow will move the entire tasks list to the grid.
    - To move several tasks at once, click on the first task and hold down the control key and click on each additional task to highlight them.
    - To move a group of tasks to the grid, highlight the first task in the group list, hold down the shift key and then click on the last task in the list. The group will then be highlighted and ready to move.
  13. The order the tasks are arranged in the task grid is the same order they will be in during the Telephony call. To change the order of tasks listed in the grid use the **Move Up** and **Move Down** buttons.
    - Highlight the task to be moved and click on the **Move Up** or **Move Down** button.

- Each click will move the task one place.

### **Edit Tasks/Tasks with Place Holders**

14. The **Edit Tasks** button can be used to assign a requirement that the task requires a response, date and time or to edit a task that contains a place holder.
  - Vital sign tasks that require a numeric response are already set in the system so the user will not have to edit these tasks.
  - Our agency does not require a date and time to a specific task so we will not have to edit any tasks for this reason.
  - The Edit Tasks button will only be used to edit information in a place holder.
15. Task code 535 Ambulate patient .....feet has a place holder. When adding the 535 code to the task grid, a **User Edit** box appears.
  - Replace the place holder with the desired distance. Ex. Type '10' to replace the place holder.
  - When the task is moved to the grid, the task will display, 'Ambulate patient 10 feet.'
  - With any tasks with a place holder, the **Edit Tasks** button can be used to edit the response if a change is required.
16. Other Tasks With Place Holders:
  - 516 Soak and Clean Nails.... In place holder, indicate feet, hands or both.
  - 517 Clip and File Nails .... In place holder, indicate feet, hands or both.
  - 518 File Nails Only..... In place holder, indicate feet, hands or both
  - 545 Catheter Care ... In place holder, indicate type of catheter
17. Certain tasks are designated 'Per Patient Request' as indicated by P. P. R. at the end of the tasks description.
  - The P.P.R. tasks match those designated on the hard copy form, HBS-267, Home Health Aide Assignment Form.
  - All tasks should be completed as assigned but there is more flexibility with the PPR tasks as the patient can choose to omit these tasks occasionally.
  - PRN tasks that are never completed should not be assigned/reassigned.
  - The Home Health Aide assignment should be patient specific.
  - Tasks assigned should meet patient needs.
18. Upon recertification the Nurse Care Coordinator should:
  - Review the prior HHAide visit documentation.
  - Discuss the patient's personal care needs with the Home Health Aide during the patient's case conference.
  - Review the patient's Home Health Aide assignment with the patient/care person and update as needed.

- In order for Horizon to indicate that the Telephony Care Plan was updated, the nurse has to make some kind of change and then change the care plan back if no assigned tasks are being changed.
  - CMS requires that the Home Health Aide assignment be update at a minimum of every 60 days and more often as needed.
19. Only needed tasks should be included on the Telephony Care Plan. Make sure to remove tasks not needed and add tasks reflecting new patient needs.
  20. **Baths:** Only one type of bath can be assigned per the Conditions of Participation. Assign one bath type after discussion with and assessment of the patient. Explain to the patient that the Home Health Aide must complete the type of bath assigned. If the patient requests a different type of bath during a Home Health Aide visit, the home health aide will call the office and report to the Supervisor/Nurse Care Coordinator. A verbal OK must be obtained from the supervisor or nurse care coordinator.
    - The Home Health Aide will complete a Code 500 report indicating the phone call and the change in the plan of care.
    - The RN giving the OK will also complete a case communication note and update the Home Health Aide assignment if applicable.
  21. When the assignment of tasks is completed, click **OK** to exit.
    - The **Telephony Care Plan Worksheet** can be printed prior to exiting.
    - See instructions below on printing the worksheet.
  22. The **Cancel** button will discard the changes and exit Telephony Care Plans.

### Updating the Telephony Care Plan

1. The Telephony Care Plan will be updated as needed and at a minimum of every 60 days.
2. The **Telephony Care Plan** is updated from **Clinical Explorer**.
  - The **Telephony Care Plan** can be updated on the laptop but the worksheet will have to be printed when connected to the **Network** or from a desktop computer.
3. Add the patient by episode to the visit tree in Clinical Explorer.
4. Select the case by **highlighting** the patient name.
5. Select **Go, Telephony Care Plan**.
6. Set **Service Type** by clicking on the drop down arrow: Choose **AE** for the Home Health Aide.

7. Set **Service** by clicking on the drop down arrow: Choose **AE Service** for the Home Health Aide.
8. The current care plan will populate to the right side of the screen.
9. Review all prior tasks assigned and make changes as needed.
10. **NOTE: IMPORTANT** In order for Horizon to recognize that the care plan has been reviewed and updated, a change has to be initiated to the tasks listed.
11. If the tasks assigned for the new recertification period will be exactly as previously assigned, move one task up or down and then the task can be moved back to its prior position.
12. When a task is moved up or down or removed and added back, then Horizon will capture the review and update in a Telephony Care Plan Note.
  - Instructions to follow on the use of the **Telephony Care Plan Note**.
13. Click **OK** when the update is complete to exit the screen.
  - The **Telephony Care Plan Worksheet** can be printed prior to exiting.
  - See instructions below on printing the worksheet.

### **Printing the Telephony Care Plan Worksheet**

1. Once the **Telephony Admission Note** and the **Telephony Care Plan** has been created and assigned to a patient/admission, the **Telephony Care Plan Worksheet** should be **printed and signed** by the Nurse Care Coordinator.
2. The printed worksheet should be taken to the patient's home in order for the patient and caregivers to know tasks assigned.
3. To **Print** the Telephony Care Plan Worksheet while in the care plan window, click on **Tools, Print Care Plan Worksheet**.
  - A Print Preview is displayed.
  - Review the Telephony Care Plan to ensure tasks are assigned correctly.
  - Click the Print button from the Print Preview screen to print the worksheet.
4. Click the **OK** button to save changes and exit Telephony Care Plans.
5. To **Print** the Telephony Care Plan Worksheet after closing out of the Telephony Care Plan screen:
  - With the patient's admission highlighted in the tree view of Clinical Explorer, go to **GO, Telephony Care Plans**.

- Set **Service Type** by clicking on the drop down arrow: Choose **AE** for the Home Health Aide.
  - Set **Service** by clicking on the drop down arrow: Choose **AE Service** for the Home Health Aide.
  - The current task list will be displayed on the right side of the screen.
  - Click on **Tools, Print Care Plan Worksheet**.
  - A Print Preview is displayed.
  - Click the Print button from the Print Preview screen to print the worksheet.
6. Click the **OK** button to exit Telephony Care Plans.

**NOTE: If the home health aide is to make a visit the same day as the Admission, the admitting nurse will complete a hard copy assignment sheet and leave in the patient's home for the employee. When the Telephony Care Plan Worksheet is completed in the office and sent to the patient's home, then the hard copy assignment that was left for the first visit can be picked up and shredded.**

#### **Using the Telephony Care Plan Note**

1. The **Telephony Care Plan Note** provides a history of the Telephony Care Plan.
2. Horizon automatically creates a new **Telephony Care Plan Note** when a Telephony Care Plan is created or updated and the OK button is clicked.
3. Essentially the Telephony Care Plan Note is an electronic version of the Telephony Care Plan Worksheet minus the Telephony Admission Note Header Information.
4. The **Telephony Care Plan Note** is a **Note Type** under the **Admission Note** category.
5. To review the Telephony Care Plan Note, go to the Notes section with the patient's name highlighted in the tree view of Clinical Explorer.
  - Set the Category as Admission Note.
  - All Telephony Care Plan Notes created for the episode will be displayed in the Notes box.
6. The Telephony Care Plan Note will serve as the electronic Home Health Aide Telephony Care Plan/Assignment.
7. The Telephony Care Plan Note can be printed if needed for survey or audit purposes.
8. To print the Telephony Care Plan Note, go to **Reports, Office, Print Notes Report**.

9. Set parameters as follows:
  - Go to the **Admission Selection** tab and select patient by admission.
  - Return to the **Report Information tab**.
  - **Print Options:** Leave as defaulted.
  - **Note Selections:** Choose the **Notes Category, Admission Notes**.
  - **Note Type:** TE, AE Telephony Care Plan Note.
  - **Date Ranges:** Set to capture desired information.
  - **Report Groups:** Leave as defaulted or set to display desired order.
  
10. Click the **Print** icon to print preview. Click the **Print** icon again to print.