



## HH Role-Based Assessment Checklist

### ADMISSIONS/INTAKE COORDINATOR

#### Skills:

- Excellent communicator
- Rapport with physicians, facility discharge planners/case managers
- Clinical background
- Patient advocate
- Understand clinical capabilities of agency staff, specialty programs available, etc.
- Organized, structured

#### Processes:

- Weekend/holiday/evening referrals
- Referral/intake processing – electronic vs. paper, documentation management system
- Receipt of transfer/hospital documentation; documentation from community-referring physician
- Scheduling visits
- Order management

#### Educational Opportunities:

- Clinical programming – clinical strengths, clinical competencies
- Referral development
- PDGM and other payment models (Managed Care, Med B, Medicaid, Commercial)

### NURSE MANAGER/DIRECTOR OF NURSING

#### Skills:

- Strong clinical evaluator
- Understand clinical capabilities of agency staff, specialty programs available, etc.
- Organized, structured
- Excellent understanding of reimbursement in HH – Med A (PDGM), Managed Care, Med B, Medicaid, etc.

#### Processes:

- IDT meetings
- Assessment timeframes
- Diagnosis coding – primary, comorbidities
- Weekend/holiday/evening referrals
- Visit scheduling
- Software capabilities – interfacing, diagnosis code alerts



- Receipt of transfer/hospital documentation; documentation from community-referring physician
- Clinical competencies/skills development
- Transfers to acute/post-acute
- Physician signatures/signed orders

Educational Opportunities:

- ICD-10 coding – primary diagnosis, comorbidities
- Section GG
- Transitions of care – discharge readiness
- PDGM implementation – episodes spanning January 1, 2020 implementation date

## **DIRECTOR OF REHAB**

Skills:

- Strong clinical evaluator
- Understand clinical capabilities of agency staff, specialty programs available, etc.
- Organized, structured
- Excellent understanding of reimbursement in HH – Med A (PDGM), Managed Care, Med B, Medicaid, etc.

Processes:

- IDT meetings
- Assessment timeframes
- Software capabilities – interfacing, diagnosis code alerts
- Visit scheduling
- Clinical competencies/skills development
- Order management

Educational Opportunities:

- ICD-10 coding – primary diagnosis, comorbidities
- Section GG
- Treatment planning – determining intensity
- Transitions of care – discharge readiness
- Clinical programming – clinical strengths, clinical competencies



## BILLING

### Skills:

- Organized, structured
- Process-driven
- Excellent understanding of reimbursement in HH – Med A (PDGM), Managed Care, Med B, Medicaid, etc.

### Processes:

- Order management
- Compliant face-to-face certification
- Completed and successfully transmitted OASIS
- Split percentage payments/RAP submission
- Pre-bill review
- Final claim submission
- Transfers, partial episode payments (PEP)
- Discharges, readmissions
- LUPAs

### Educational Opportunities:

- PDGM implementation – episodes spanning January 1, 2020 implementation date