How to complete an OPTIMISTIC Self-Audit

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Who We Are

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What we will cover today

1. Why the is self-audit important
2. How to use the self-audit tool.
3. How to interpret the results
4. How to resolve issues uncovered by the self-audit
Key Takeaway 1: Why is a self-audit important?

- Audits expose:
  - systematic issues
  - documentation issues

- A Self-Audit will prepare you for the CMS guided chart review
Key Takeaway 2:
How do I use the self-audit tool?

- Anything that is red is bad
- Contains drop downs and easy to use formatting
- Suggest you audit 10 previous certifications
- Only use documentation found in the medical chart!
Key Takeaway 3:
How do I interpret the results?

• Pay close attention to timing
  – Days taken to certify
  – Average length of certification
  – Billing dates

• All documentation needs to be 100%

• Identify when your nurses stop documenting
Key Takeaway 4: How do I resolve systemic issues?

• Timing Issues:
  – Ensure effective communication with providers
  – Clarity with the billing office

• Documentation
  – Review guidance sheet in morning meeting.
  – Discuss in morning rounds/GEMBA

• Nursing Documentation Trend
  – Provide clear guidance to nursing staff
  – Ensure nurses are documenting throughout the certification
Key Takeaway 4: How do I resolve practical issues?

• Inappropriate bills
  – Withdraw – how do they pay back?
• Missing MD note?
  – Get the note from the provider
• Missing CIC documentation
  – Can’t bill - withdraw
• Missing nursing documentation?
Questions?

• Can someone share an effective communication practice?
• Can someone share the incorporation of OPTIMISTIC in morning meeting?
• Has anyone done a self-audit?
• Has anyone withdrawn a claim?
Reminder

- If you are a Payment Only Nursing Home & you participated in this webinar, your August Engagement call will be cancelled.