MOST™ User Manual

Version 6.3.1 (Oct 10, 2021)

Performance Improvement Link, Inc.

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1 Start Here

1.1 Overview

MOST™ is a web-based application for tracking and documenting compliance to a standard. To that end the two primary functions of the application are auditing and reporting. Each audit is composed of yes/no questions that are to be answered by a reviewer. Results of one or more audits are then available in various reports that provide insight into levels and trends of compliance. Ultimately, each piece of the application is for the purpose of supporting these two functions (auditing and reporting).

Audits are based on lists of questions which we call question sets. In some contexts question sets are referred to as “tools”. Questions can be created and managed within the application or they may be provided as part of a published standard. An audit can include one or more question sets and identifies one or more subjects (persons or entities that are being audited).

1.2 Getting Help

Sources of help/guidance (beyond this manual) when using/learning MOST™:

- Help Button: Inside the application many screens provide a help button that displays a context-sensitive list of topics.
- Your Local Admin: Each organization has one more administrative users who were involved in the setup process and know how it is being used on site.
- Website: General information is available at: https://www.mostaccess.com
- Email: Still need help? No problem. Contact: help@pilservices.com

1.3 NextStep Integration

A majority of MOST™ customers use it as a standalone application. Organizations that access MOST™ from the NextStep EMR enjoy additional functionality. In each section of the manual we highlight sections that behave differently for NextStep users.

1.4 About v6.2.5

This version implemented logging of actions involving adding questions to and removing questions from a question set. There are no user-facing changes.

2 Initial Setup

2.1 Permissions Models

Each organization that uses MOST™ chooses a permissions model that determines what user roles are possible. If you are unsure which permissions model your organization uses you can ask via email. All NextStep integrated accounts use the CompliaTrac model. In both permissions models there are collections of actions that can be given or withheld from individual users as follows:

- Permissions to work with audits
- Permissions to manage questions and question sets (question admin)
- Permissions to manage user accounts (user admin)
- Permissions to manage persons and tags (list admin)
- Permissions to perform organization-wide reporting (report admin)

2.1.1 Traditional Permissions Model

This model is useful for organizations who want a few folks who are users of the application to manage accounts and have full access within their organization.

- Organization admin can: audit, manage questions, manage user accounts, manage lists, access all reports, unlock and unarchive audits
- Auditing users can: audit (and can be given or denied additional permissions)

2.1.2 CompliaTrac Permissions Model

This model is useful for organizations who want a separation of powers between those who manage accounts and those who do the auditing.

- User admin can: manage user accounts but cannot work with audits (and can be given or denied any additional privilege--except for the ability to audit)
- Auditing user can: audit but cannot manage user accounts (and can be given or denied any additional privilege--except for the ability to manage accounts)

Additional details of how access is granted or denied according to each permissions model is embedded in each section.

2.2 Person Roles and Tag Types

Each organization can establish person roles and tag types to customize the auditing and reporting process. Adding person roles and tag types has a significant impact on the interface and so is performed by a MOST™ system administrator at the time an organization begins using the application. To make subsequent changes to these values send your request to help@mostaccess.com.

2.2.1 Person Roles

The application maintains a list of people who are referenced in the system. People in the list may include users of the system, clients, therapists, supervisors, etc. These different categories of people are what MOST™ refers to as “person roles”. The “reviewer” role indicates a user of the system who will be performing audits. This role is non-configurable. Other roles can be created as needed. A person can be assigned as many roles as apply to them which will determine which lists they appear in. For each person role that is added to the system the following changes occur:

- A button is added to the top menu of the person listing screen for managing groups of that role.
- A checkbox is added when modifying a person to allow them to be designated as filling the specified role.
- The role is included as an option for specifying an audit subject.
- The role is listed as an option for “Advanced Filters” on the audit listing screen.
- The role is listed as a potential filter for many reports.

Each person role can be designated as required as an audit subject. This would be unusual, however. For example, designating “Client” as required would force every audit to include at least one client. If the specified role (e.g., “client”) contains PHI then this also can be specified. Many reports include options for hiding values so-designated in the case a report is to be used more widely.

2.2.2 Tag Types

Tags are used as audit subjects. Tag types represent categories for tags. Some examples of tag types are: location, program, foster home, etc. The “location” tag type is fixed/required, but other tag types are configurable. The more tag types that are specified, the more options become available when auditing and reporting. For example, if every audit specifies a location and a program then results can be filtered using either or both of these categories.

For each tag type that is added to the system the following changes occur:

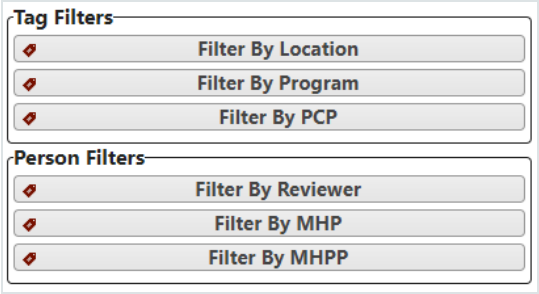
- A button is added to the “Audit Tags” group on the Menu screen.
- The tag type is included as an option for specifying an audit subject.
- The tag type is listed as an option for “Advanced Filters” on the audit listing screen.
- The tag type is listed as a potential filter for many reports.

As with person roles each tag type can be designated as required as an audit subject. They can also be designated as containing PHI. Tag types provide an additional option of being user-editable. Doing so would allow an auditor to add new tags even if they don’t exist in the drop-down list.

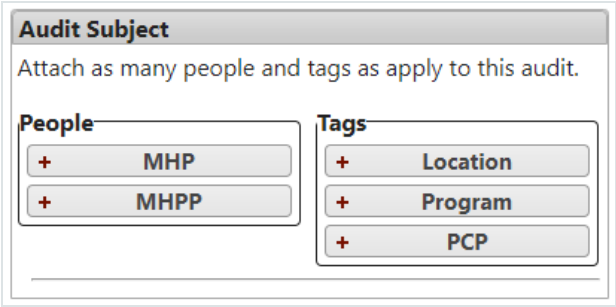
2.2.3 An Example

Suppose an organization uses these person roles: **Reviewer, MHP, MHPP**. And they provide these tag types: **Locations, Programs, PCPs**. These screenshots provide examples of some ways the MOST™ interface is affected:

Report Filters



When Creating an Audit



3 Account Management

User accounts in MOST™ are created by administrative action. For **NextStep-integrated** organizations these accounts are managed by NextStep and the instructions in this section do not apply.

3.1 Using an Account

Each account must be activated by the owner. Once the account is activated (and a password has been set) the user will be able to log in.

3.1.1 Activation

Once an account is created an activation email will be sent to the new user's email address. The new user must activate his or her new account by:

- Click on the link inside the activation email.

  This must be done within 10 days of its creation. The user will be prompted to set their password during the activation process.

3.1.2 Expired Activation

If a user fails to activate their account within 10 days then the link provided in the invitation email will no longer work. A new activation invitation can be generated by a user admin for the organization by:

- If necessary, click on the **Menu link** (Menu)
- Click on the **Users button** from the Menu page.
- Click on the **Email icon** ( ) beside the user to whom the invitation email is to be sent.

3.1.3 Forgotten Passwords

In the case of a forgotten password there are two ways to have the password reset. Both methods result in an email being sent to the user's email address. The email contains a link that allows the user to choose a new password. The email can be generated by the user:

- At the login screen, click the **Forgot Password link**.

  The email can also be generated by an organization administrator:

- If necessary, click on the **Menu link**(Menu)

- Click on the **Users button** from the Menu page.
- Click on the **Email icon** ( ) beside the user to whom the invitation email is to be sent.

3.1.4 Confirmation code

If a user exceeds the maximum number of unsuccessful login attempts, the user will be presented with a unique, computer generated CAPTCHA code. The user must enter that code successfully along with the username and password.

3.1.5 Logging Out

Users will be automatically logged out after 15 minutes of inactivity. When a user is finished using MOST™ for a period of time, it is recommended that they click the **Logout link** (Logout) in the upper right corner of the screen. This will prevent anyone else who has access to the computer from gaining access to their account.

3.2 Creating and Managing Accounts

Only users with account management privileges can create all user accounts. Users with account management privileges include:

- Organization admins (for organizations using the traditional permissions model)
- User admins (for organizations using the CompliaTrac permissions model)

See section Listing Screens below for information on working with features common to many listing screens. The user listing screen is launched by:

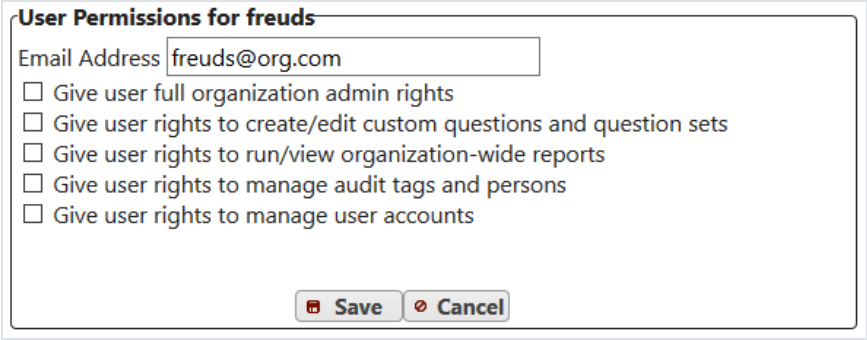
- If necessary, click on the **Menu link** (Menu)
- Click on the **Users button** from the Menu page.

General restrictions on creating and modifying accounts:

- The owner of each account will need to be added as a person prior to having their account created.
- Each account must have a valid, unique email address.
- The username must be unique and cannot be easily changed once set.

3.2.1 Permission Options for Traditional Permissions Model

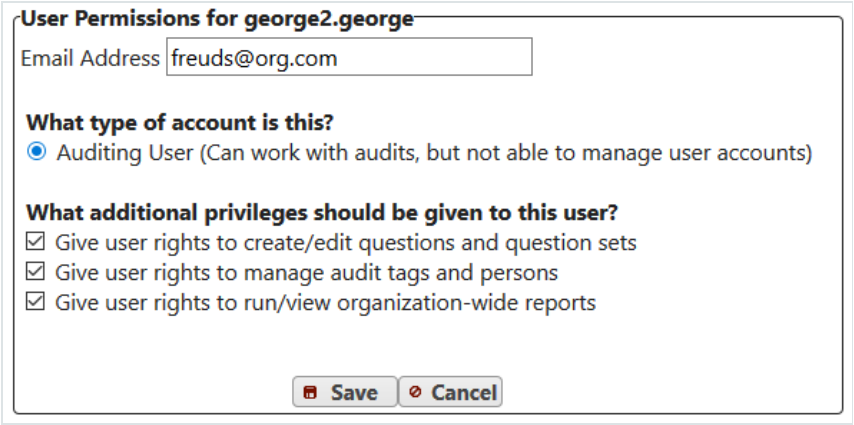
Organizations that use the traditional permissions model can set permissions for accounts as follows:



Assigning full organization admin rights will automatically provide all other rights. For non-organization admins the remaining rights can be granted or revoked individually.

3.2.2 Permission Options for CompliaTrac Permissions Model

In the CompliaTrac permissions model accounts are designated mutually exclusively as user admin accounts or auditing accounts. Once the account type has been set it cannot be changed. User admins are also, by default, list admins. The permissions screen for an audit user looks like this:



3.3 Searching the Activity Log

MOST™ maintains a detailed accounting log of who does what (and when). Viewing this detailed activity log is available to:

- Organization admins (for organizations using the traditional permissions model)
- User admins (for organizations using the CompliaTrac permissions model)

See section Listing Screens below for information on working with features common to many listing screens. The Activity Log Screen is launched by:

- If necessary, click on the **Menu link** (Menu)
- Click on the **Activity Log button** from the Menu page.

The Activity Log Screen provides detailed information about many actions taken in the system down to the level of the time over every answer made in every audit (and who entered the answer). The log cannot be altered as it represents actions that have happened in the past. The logs take up quite a bit of space so they may be periodically archived securely off site. If archived logs are needed they can be retrieved by sending a request to help@mostaccess.com.

There are a variety of filters that can be applied to identify areas of interest:

- *Start and Stop Date* These default to the previous six months. They can be narrowed or widened as needed to isolate a time frame of interest. All dates and times are provided in the time zone of your organization.
- *User Filter* This can be applied to see only actions taken by a particular user.
- *Log Type Filter* This filter is applied to categories of actions (like adding ribbons, or answering a question).
- *Audit Filter* This filter intelligently identifies all actions taken on the selected audit including header changes, ribbon changes, and question-level data.
- *Search Filter* This filter is used to apply a case-sensitive search string to any data logged by the system.

As with other listing screen the data can be sorted by any column.

3.3.1 Log Tampering Features

The activity log implements error detecting codes that are used to determine whether entries in the activity log have been modified from outside the application. Any entries that have evidence of tampering will have a conspicuous error indicator as shown here:

2021-10-09 10:29:27	Sergeant, Terry (tsergeant)	viewed audit	tsergeant viewed audit "No Question Sets"
2021-10-08 17:14:27	Sergeant, Terry (tsergeant)	viewed report	tsergeant viewed detail report for "No Question Sets" from audit listing screen
2021-10-08 17:11:35	Sergeant, Terry (tsergeant)	viewed report	tsergeant viewed detail report for "Report Test 6" from audit listing screen WARNING: This log entry has been flagged as being modified outside this application.
2021-10-08 17:11:35	Sergeant, Terry (tsergeant)	viewed report	tsergeant viewed detail report for "Report Test 6" from audit listing screen
2021-10-08 17:07:38	Sergeant, Terry (tsergeant)	viewed report	tsergeant viewed report with params: {"some-id-type":"2","_audit_defn_types":"0","start-date":"01\/01\/2018","stop-date":"07\/13\/2020","include-comments":"on","include-na":"on","report-format":"PDF","summary":"","report-segment":"person_15","report-id":"answer-totals-report"}

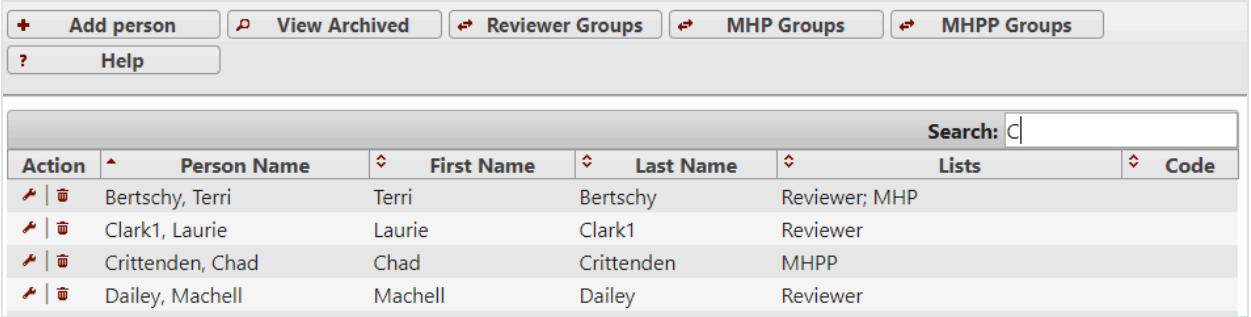
The “Tamper Report” button can be used to launch a full report of any modified or deleted records. The number of entries in the activity log can be large so it may take some time for the report to complete. It is unexpected for the report to indicate any findings. For that reason, a non-clean report should be reported to help@mostaccess.com.

4 Listing Screens, Persons, and Tags

When creating an audit there must be at least one audit subject identified. An audit subject can be a person or a tag. So, prior to auditing a user with privileges to work with lists (a list admin) will need to populate the person and tag lists so they will be available when auditing. **NextStep-integrated users** will not need to do this when using batch-created audits because the lists will automatically be populated with needed values.

4.1 Listing Screens

When working with persons (or tags) the first screen is a “listing screen” which provides a list of the persons in the system. Listing screens are widespread throughout the application, so learning to navigate one listing screen will carry over to other parts of the application. The persons listing screen will look something like this:



A listing screen has a menu of buttons at the top of the screen that typically include options for: Add, View Archived, and Help. Some listing screens also provide one or more buttons for working with groups of items. In this example, groups can be created for each person role that exists for the organization. (See discussion of Person Roles and Tag Types above).

The list itself will show pertinent information stored about the items along with an Action column containing icons showing available actions for the entry. Nearly every listing screen will include the two actions shown in this example:

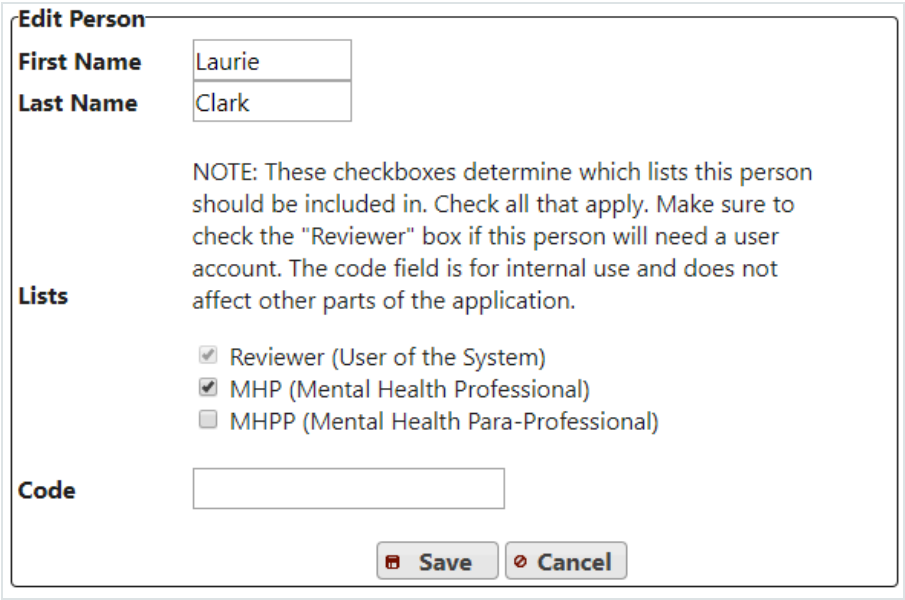
- to modify the entry
- to archive the entry

4.1.1 Searching and Sorting

The search box at the top-right of the list efficiently restricts a long list to show only matching entries. In addition columns are sortable by clicking on the column header. This above example the list is currently sorted in ascending order by “Person Name”. Clicking on the “Person Name” header will resort in reverse order.

4.1.2 Adding/Editing an Entry

Adding and editing an entry uses the same interface. In this example we store last name, first name, roles, and a code:

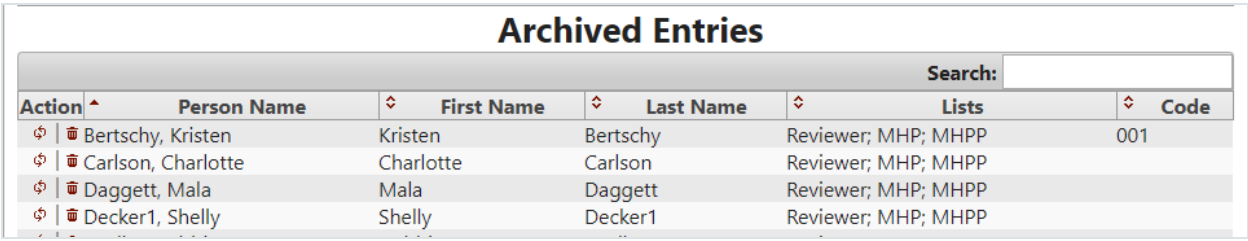


The code is not used by the application but is provided as an option to store additional text regarding persons that can aid searching on the listing screen.

4.1.3 Archiving vs. Deleting

Many listing screens include an option for **archiving** an entry via a **trash can icon** ( ). Suppose a person who was a therapist and who has appeared as a subject in several audits has left the organization. You will likely want to archive this user so their name will no longer appear in drop-down lists or on the person listing screen. Archiving a person does not remove them entirely from the system. Instead it removes them from a listing screen.

To work with archived entries simply click the **View Archived button** to produce the "Archived Entries" listing screen:

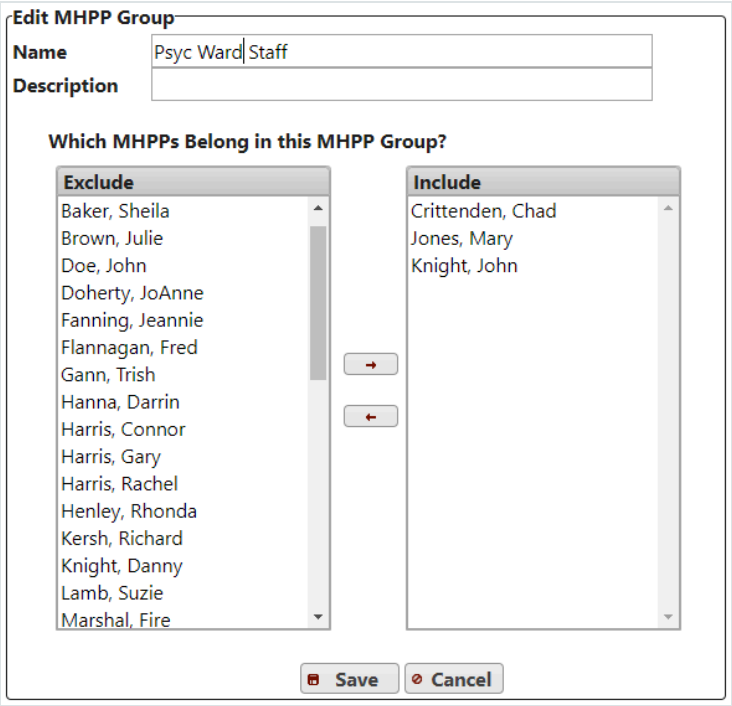


If an entry has been archived accidently it can be restored by clicking the corresponding restore icon . To **permanently delete** an entry from the system you can click the trash can icon from the list of archived entries. You will not be able to permanently delete entries

that are referenced by audits. This is to allow for historical reporting and to prevent invalid database references.

4.1.4 Working with Groups

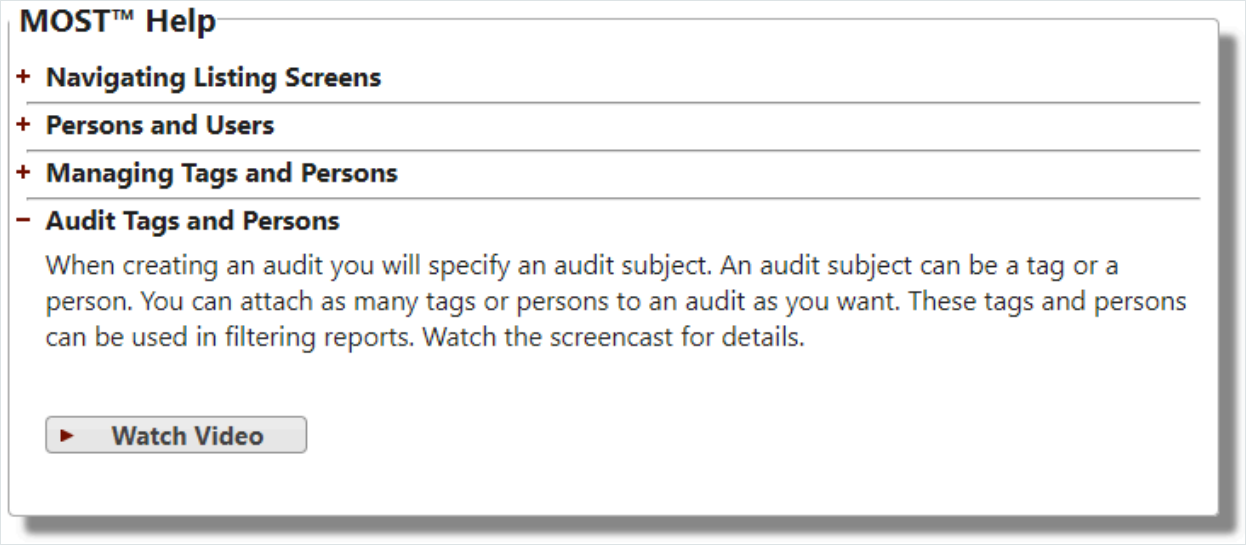
Groups of items are used through MOST™ to facilitate flexible filtering in reports. As an example, you may want to view auditing results for all paraprofessionals that work with a given therapist. Or, you may want to see a list of audits completed by a particular group of reviewers. In either case you'll need to create a group of entries. To work with groups click the **Group button** in the header of the listing screen. The result is a listing screen showing groups. Adding or editing a group will produce a screen similar to this:



Entries can be moved between the "Exclude" and "Include" columns by highlighting one or more of them and clicking the corresponding arrow.

4.1.5 Using Help

Clicking on the **Help button** at the top of a listing screen provides a list of context-sensitive topics as shown here for the person listing screen:



Clicking on a topic header will display the help text. Some help topics include an instructional video.

4.2 Persons and Tags

Establishing lists of persons and tags is needed to populate drop-down lists used when creating audits. Persons and Tags both utilize a listing screen as the initial interface. (See section Listing Screens above for details on working with listing screens).

4.2.1 Persons

The “person listing screen”can be accessed by:

- If necessary, click on the **Menu link** (Menu)
- Click on the **Persons button** from the Menu page.

For information about person roles and where they come from see section Person Roles and Tag Types above.

4.2.2 Tags

There is a separate listing screen for each tag type. For information about tag types and where they come from see section Person Roles and Tag Types above. On the Menu screen tag types are listed in their own section as in this example:

Listing screens for tags are launched by clicking on the appropriate button for the tag you want to work with.

5 Working with Question Sets

Only organization admins and question admins can work with question sets and custom questions. Question sets are groups of questions based on questions from a provided standard or based on custom questions (or both). Once a question set has been established it is reused in as many audits as needed. Although question sets can be modified it is common for them to remain substantially the same once they are in use.

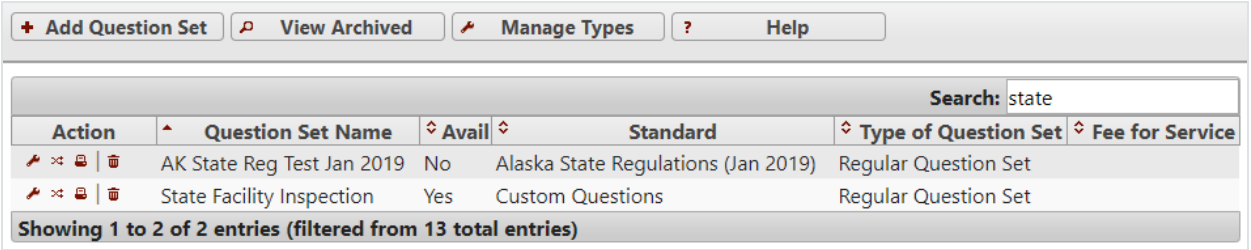
5.1 Question Sets

5.1.1 Question Set Listing Screen

See section Listing Screens above for information on working with features common to many listing screens. The question set listing screen is launched by:

- If necessary, click on the **Menu link** (Menu)
- Click on the **Question Sets button** from the Menu page.

An example list might look like this:



One of these question sets is based on a system-provided standard and the other is coming from custom questions. **Question Set Types** are configurable categories for organizing question sets. These categories are used for grouping and filtering in several of the reports. These types can be created, removed, and renamed by clicking on the **Manage Types button**.

The **Fee for Service** value is optional and would be used in cases where the question set pertains to a chart review for a specified service (e.g., psychotherapy) that has a customary fee associated with it. The value provided here simply serves as a default value that can be overridden in an actual audit. Some reports allow estimation of risk of recoupment for services that fail to meet a given compliance rate.

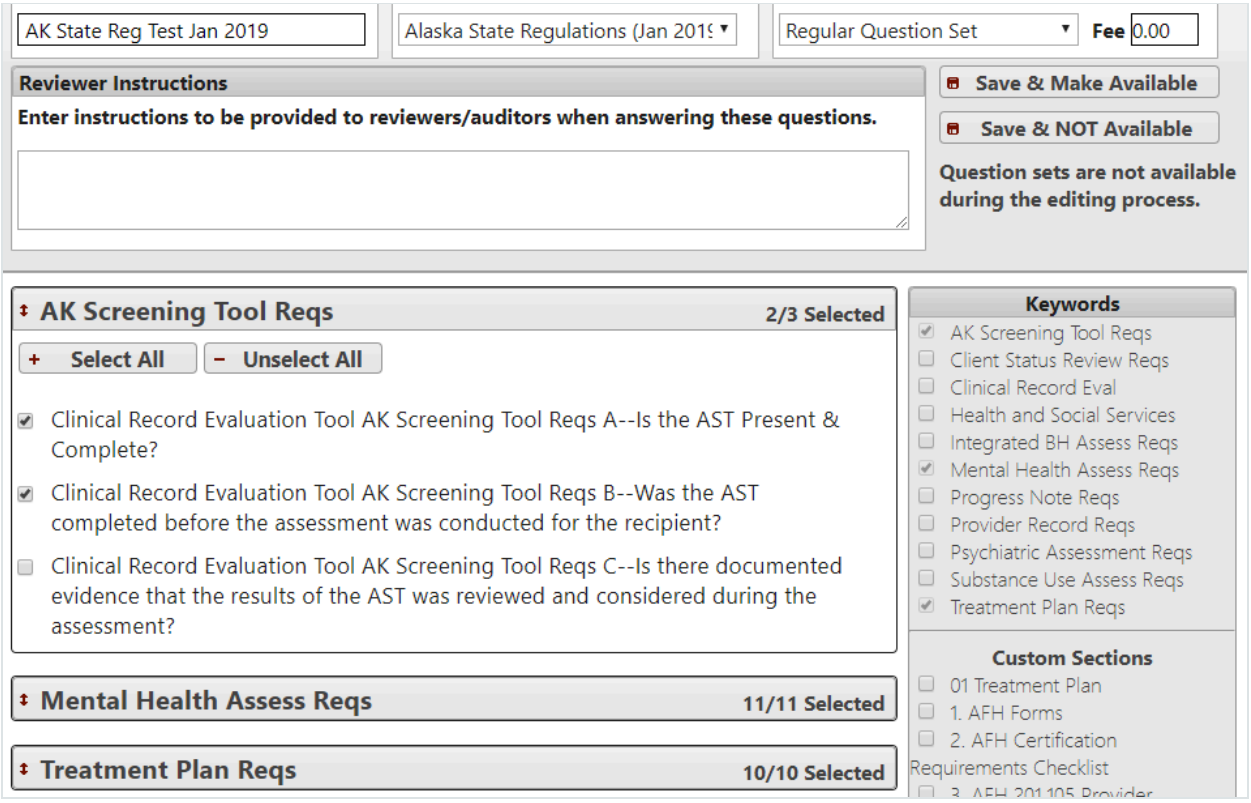
When a question set is marked as **available** it will appear as an option when creating an audit. When a question set is being modified it is automatically marked as unavailable to prevent other users from accessing an incomplete/unfinished question set.

The available actions for each question set are:

- to modify a question set
- to toggle availability of the question set
- to print a question set
- to archive a question set

5.1.2 Creating/Modifying a Question Set

When creating a question set you will need to specify the standard from which the questions will be drawn. If the question set will contain only custom questions then indicate **Custom Questions Only** from the drop-down. When later modifying a question set the standard on which the question set is based cannot be altered. An example of modifying a question set can look like this:



Clicking on the checkboxes to right will bring in groups of questions in ribbons according to associated keywords or section names. Individual questions can then be selected for inclusion/exclusion as needed. When finished identifying questions **click one of the save buttons** at the top right.

5.1.3 Printing a Question Set

The print icon provides a convenient way to launch the report interface for printing a question set. For details of report options See the Printable Question Set Report section below.

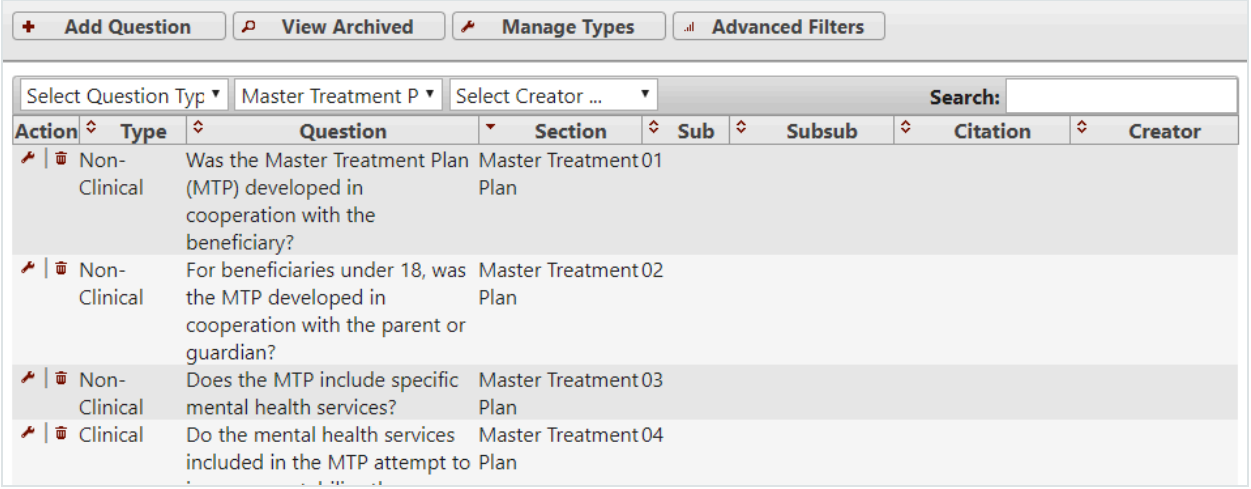
5.2 Custom Questions

Many organizations make extensive use of the ability to create custom questions for compliance. As a compliance platform, MOST™ requires that all questions have yes/no answers where “yes” indicates compliance and “no” indicates non-compliance.

See section Listing Screens above for information on working with features common to many listing screens. The custom question listing screen is launched by:

- If necessary, click on the **Menu link** (Menu)
- Click on the **Questions button** from the Menu page.

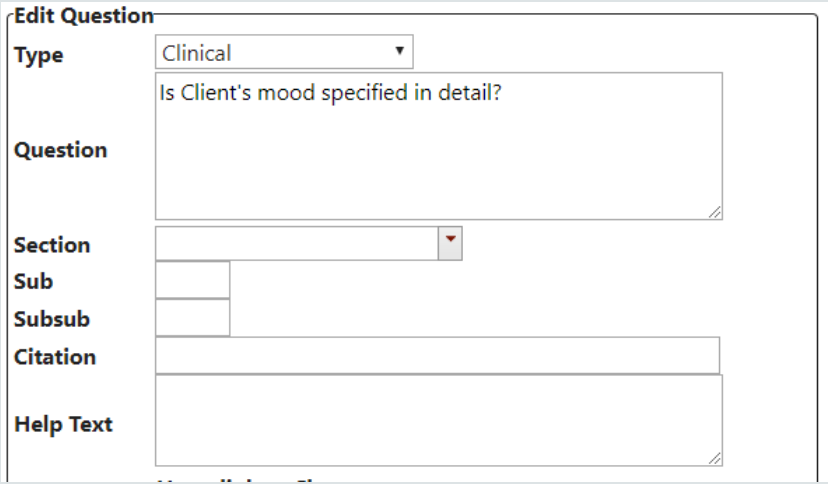
An example list:



The **question type** is used primarily as an organizational aid when there are a large number of custom questions. The types are configurable via the **Manage Types button**. The “Clinical” type cannot be changed or removed as some reports segment results according to clinical and non-clinical questions.

The drop-down boxes are provided via the **Advanced Filters button**. These filters can be used together to shrink the list of questions to a manageable size. **NextStep-integrated customers** have an additional drop-down that allows selection of questions from standards. Although the text of such questions cannot be modified, they can be linked to a specific form/question in the EMR to provide convenient lookup when auditing a chart.

When creating/editing a question the following form is presented:



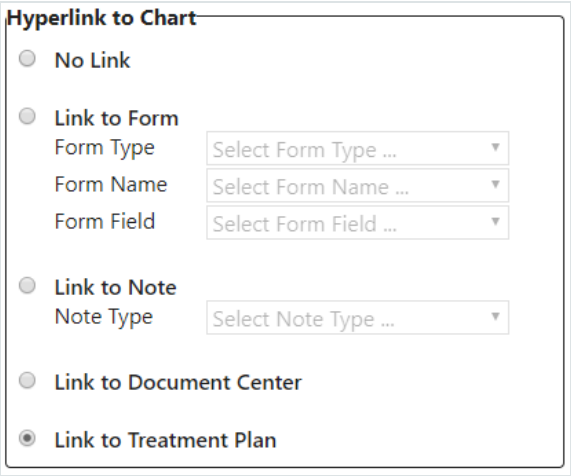
The **question** field must have a yes/no answer where “yes” indicates compliance and “no” indicates non-compliance.

The **section** field is especially significant as the questions are grouped by section name when working with question sets. *When a question set is used in an audit questions are ordered first by section, then by **subsection**, then by **subsubsection**.* For this reason it is common to use numbering in subsection (or subsubsection). NOTE: These fields are not numeric types so you will need to include leading zeros as demonstrated above if you have more than 9 questions in a single section.

The **citation** field can be used to specify a standard or other reference to which the question pertains. The citation is optionally included with questions in some reports.

The **help** field, when used, will cause a question mark icon to appear beside this question when it appears in a ribbon. Clicking the icon will cause the help text to appear. This is useful for providing additional guidance on answering a question without cluttering the question itself.

NextStep-integrated customers have an additional form attached to each question as follows:



This allows a question to be tied to a specific field, note, or treatment plan in the EMR. Questions that have a link specified in this way will display a link icon beside the question. When the icon is clicked a window to the specified item in the EMR is opened.

5.3 Questions from Standards

Some organizations pay for access to questions based on standards. Some standards currently available are: Joint Commission, CARF, and COA. Contact help@mostaccess.com if your organization has interest in using questions from these or other standards.

6 Auditing

Performing and managing audits is a primary function of MOST™. Once question sets have been created and various lists have been properly populated, the act of creating, completing, and managing audits is quick and intuitive.

6.1 Access to Audits

A user is given the ability to work with an audit if they meet any of these criteria:

- the user created the audit
- the user is named as a reviewer for the audit
- the use is named as a manager for the audit

For typical users the audit listing screen shows only audits the user can edit. An exception is that organization admins (in the traditional permissions model) will have all audits of the organization in this list. Organization admins will only be able to modify audits if one of the criteria above are met, however.

Reporting admins have permissions to run organization-wide reports and as such can view audit results even if they are unable to modify such audits.

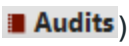
6.2 Creating an Audit

There are two main parts of an audit:

1. The audit header: contains header information such as audit name, date, who/what is being audited (i.e., audit subject), who is performing the audit, and whether or not the audit workflow involves a manager.
2. The ribbons: contain the actual questions to be answered.

6.2.1 The Audit Header

Buttons to create a new audit are available on the menus of the Tasks screen and the Audits screen. To create a new audit from the audit listing screen:

- If necessary, click on the **Audits link** (

) in the top right corner.
- Click on

- Upon completion of the audit header you will be directed to the audit answer page (described below).

To edit an existing audit header:

- If necessary, click on the Audits link (Audits) in the top right corner.
- Click on the wrench icon (✔) next to the audit you want to modify.
- Click on Edit Header

The screen to create a new audit or modify the header of an existing audit has 4 sections:

1. Audit Name/Date

   Audit Name – is the patient ID (chart number), or whatever identifier you wish to choose.

   Date - this field will automatically populate with the current date. If this is not the date chosen for this audit click on the field with the date and a calendar will appear in which a date may be chosen.

2. Audit Subject

   The categories and options for what can be specified as an audit subject are based on person roles and tag types that are in use by the organization (see section Person Roles and Tag Types). If any of these have been designated as required they will have a drop-down immediately available. Otherwise it will be necessary to choose at least one subject. There can be any combination of tags and people identified as subjects (including multiple of the same type).

3. Audit Manager Settings

   Specifying an audit manager is optional. If a manager is specified then the option for requiring a review of the audit by a manager is available. An audit manager is given privileges to modify an audit. See the Workflows section below for details on how requiring a review affects the application.

4. Reviewers

   Each audit must have 1 or more reviewers assigned. A reviewer is the user who is assigned the responsibility of completing the audit. Click on the dropdown box to choose the reviewer.

   Role – Click on the bubble which best describes the role of the auditor i.e., Normal, Peer, or Supervisor. This has minimal impact on other parts of the application. It is currently only used as a possible filter in the Audit Listing Report.

   Scope – Click on the bubble which best describes the scope of the audit: Non-Clinical, Clinical, and both Clinical and Non-Clinical. This has minimal impact on

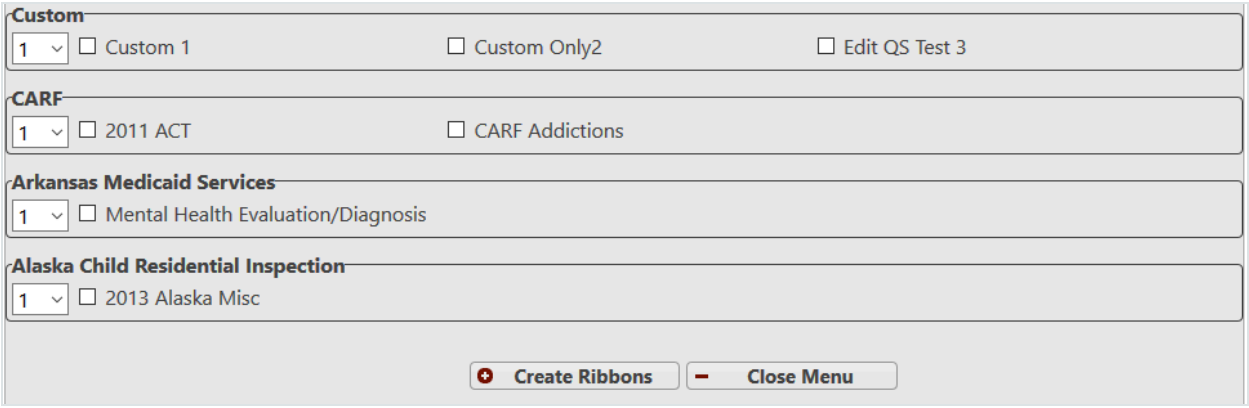
other parts of the application. It is currently only used as a possible filter in the Audit Listing Report.

Multiple reviewers can be associated with the audit by clicking on the **Add Reviewer button**. Any user listed as a reviewer will be given permission to edit the audit.

When the audit header is saved it will appear on the audit listing screen.

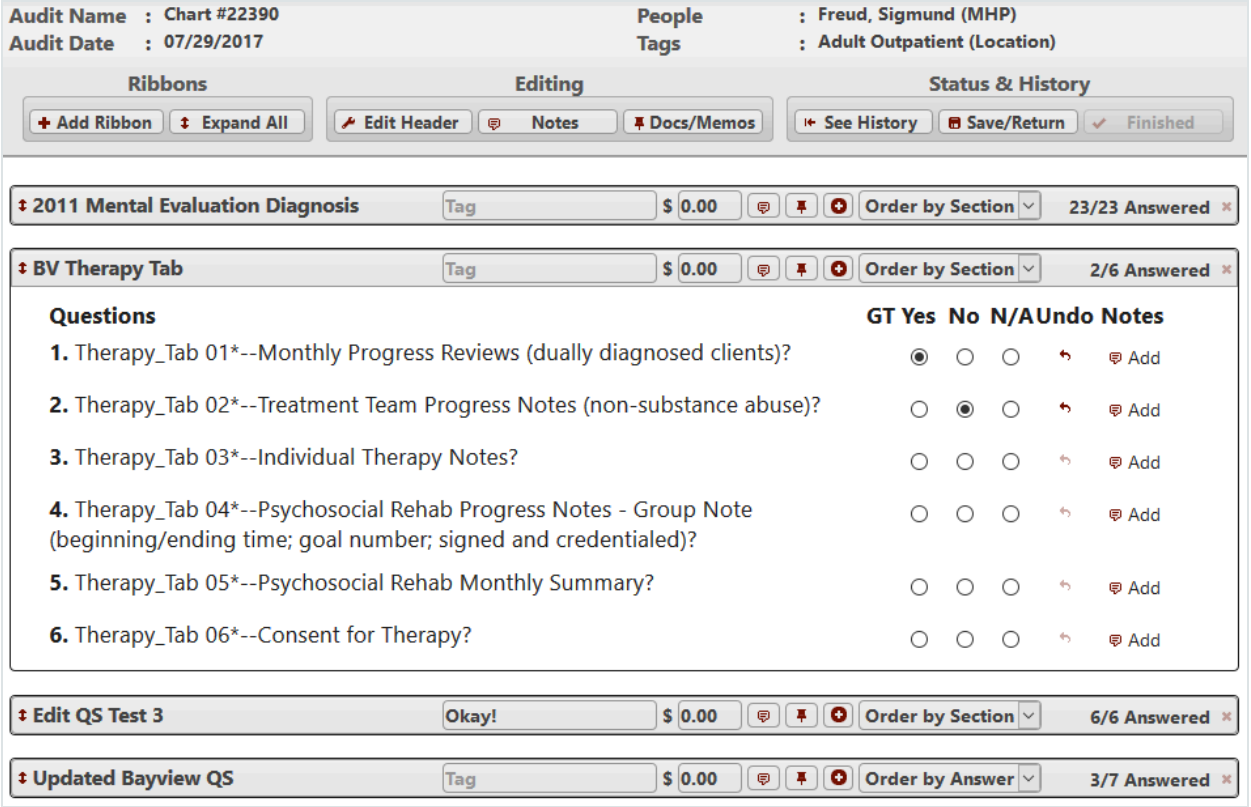
6.2.2 The Ribbons Screen

The ribbons screen for an audit provides an interface to answer questions. When first creating an audit you will be prompted to specify which ribbons to include in the audit. Each ribbon is an instance of a question set. The interface for creating ribbons looks like this:



On this screen question sets are organized by standard. If an organization uses only custom questions then all question sets will appear in the Custom category. An audit can utilize an arbitrary number of ribbons including multiple ribbons built from a single question set.

Upon creating one or more ribbons the ribbons screen appears:



This example audit contains 4 ribbons. The menu at the top provides the following buttons:

- **Add Ribbon** is used to add additional ribbons to the audit if needed
- **Expand All** opens all ribbons to reveal questions (and changes to **Collapse All**)
- **Edit Header** allows changes to audit header information
- **Notes** provides a place to enter text-based notes that pertain to the audit. These notes can appear in some reports.
- **Docs/Memos** allows external documents or memos to be attached to the audit and later retrieved. A “memo” is simply text to be stored with the audit but that will not appear in reports. Likewise, attached documents do not appear in reports.
- **See History** displays an overview of actions that have been performed on the audit in the section called “Summary History”. This summary history includes events such as creation, assigning reviewers, attaching documents, etc. MOST™ also tracks more detailed information (including who answered what questions at what time, etc). This information is provided in the section called “Detailed History”.
- **Save/Return** goes back to the audit listing screen.
- The final button changes depending on what workflow is being used and whether or not all questions have been answered. See the section Workflows for more information.

6.2.3 Answering Questions

When a ribbon is expanded it will reveal a series of questions. Questions can be answered as “Yes”, “No” or “N/A”. An answer can be “unanswered” by clicking on the “Undo” icon. If a question does not apply for a particular audit then it is preferable to answer it as “N/A” rather than leaving it blank because audits with unanswered questions cannot be locked and it can help eliminate ambiguity in reporting.

It is possible to answer all unanswered questions with a single click on the header (“Yes”, “No”, or “N/A”) for a column.

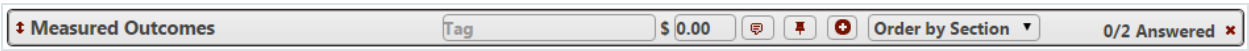
Comments can be added to an individual question/answer by clicking on the **Add button** in the “Notes” column. This will produce a popup window that allows entry of comments. Once a note has been added to a question the button label is changed from Add to Edit, notifying the reviewer that a note has been made about that specific question.

Some questions contain additional information intended to clarify the question. Questions that have this supplemental information contain a help icon (?) to the left. Simply click on the icon to view the supplemental information.

NextStep-integrated customers may also have a link icon ( ) to the left of some questions. Clicking on the link will open a window in NextStep that shows the location in a chart that the information being asked about should be documented.

6.2.4 Working with Ribbons

An example ribbon header is shown below. In addition to the form elements shown below, a ribbon contains questions which are revealed when the ribbon is expanded.



- **Opening and closing ribbons** is accomplished by clicking on the ribbon name (anywhere to the left of the tag).
- The **tag** is a simple text field (50 character max) that allows you to distinguish among multiple instances of the same question set. This tag is unrelated to “audit tags” that identify audit subjects.
- The **fee** value defaults to the value specified in the question set, but can be modified here to match the actual fee charged for a service. For many use-cases fees can be ignored. A scenario where tracking fees might be useful is in cases where a ribbon is an evaluation of a particular service (say a psychotherapy session) for which state or federal funds (e.g., medicaid) are used to pay for said service. If the service was provided in a non-compliant way then an organization could be at risk of recoupment for those fees. If fee data is kept then the Risk Detail Report can be used to specify an acceptable compliance rate and will determine fees that are at risk of recoupment.

- The **notes button** ( )produces a pop-up window in which notes specific to this ribbon can be entered.

- The **attachment button** ( ) allows external documents or memos (inline messages) to be attached to the ribbon for documentation purposes. Attached items can be retrieved by anyone who has permissions to access the audit. Attached items do not appear in reports.

- The **numbering button** (**)** toggles line numbers within the ribbon. The default numbering behavior can be specified by visiting the Preferences menu.

- **Questions within a ribbon can be ordered** by section, answer or gold/silver thread status (where gold thread refers to questions that are designated as clinical).

- **A ribbon can be removed** by clicking on the icon. The icon becomes unavailable as soon as any question has been answered. Questions can be unanswered to make the delete operation available again.

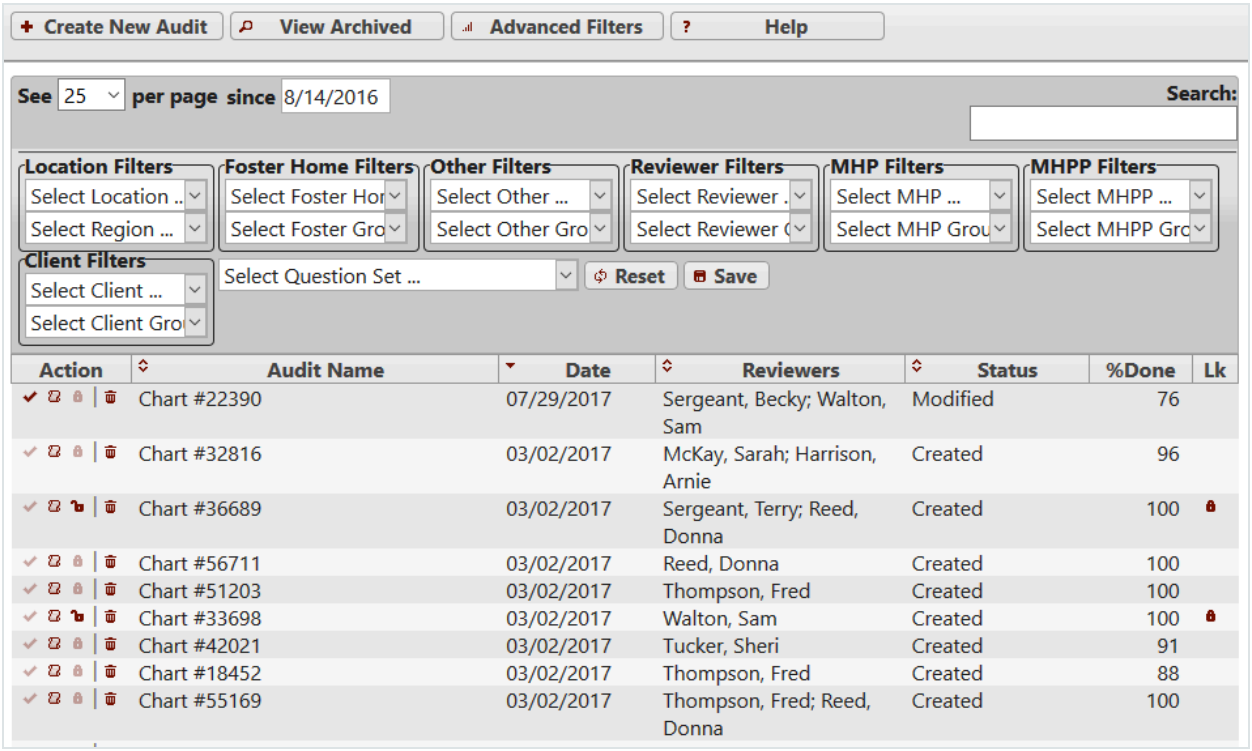
Within an open ribbon questions can be answered/unanswered and notes can be entered pertaining to each individual question. These notes can optionally appear in some reports.

6.3 The Audit Listing Screen

See section Listing Screens above for information on working with features common to many listing screens. To launch the audit listing screen:

- Click on the **Audits link** (Audits) (available at the top-right of every screen)

To see something like this:



Available actions for each audit include:

- Answer questions for the audit at the ribbons screen ( )
- View a detail report for the audit ( )
- Lock or unlock an audit (,)
- Archive an audit ( )

The audit listing provides these additional columns:

- Audit Name: specified by user when the audit is created.
- Date: specified by user when the audit is created.
- Reviewers: persons who have been assigned to complete the audit
- Status: One of these codes: Created, Submitted for Review, Reviewed/Needs Action, or Completed.
- %Done: determines what percentage of the questions in the audit have been answered.
- Lk: displays a lock icon if the audit is locked.

In this example the user is an organization admin (traditional permissions model) so they see all audits for the organization in the list even though they do not have permission to

edit all audits as indicated by the grayed-out checkmark icons.

The default view provided by the audit listing screen is to display audits from the last 6 months. There are 25 displayed per screen by default. Audits are listed in reverse date order so that most recent audits are listed first. Audits can be re-ordered by clicking on any header. Also, the list can be searched by entering text into the search box at the top of the list. If there are more than 25 audits to be listed the user can see more by using the navigation buttons at the bottom of the list or by increasing the number of audits listed on the screen (up to 100).

6.3.1 Viewing a Detail Report for an Audit

A detail report for an individual audit can be launched by clicking on the **report icon** ( ) beside an audit. The report will not show unanswered questions and will not show questions marked as N/A. It will include the audit name. To run the same report with different options/settings see section Audit Detail Report below.

6.3.2 Using Advanced Filters

A user can restrict/filter the audit list further by clicking the Advanced Filters button. Clicking this button opens a panel in the list header that allows filtering audits by persons, person groups, tags, tag groups, and by question set. This panel also provides the ability to save a filter set so that when the user returns to the audit screen those filters will remain in effect. The filter saving feature also applies to ordering of the list, the start date (stored as number of days prior to the current date), the number of entries to view and a search value. To permanently clear filters, first click on the Reset button and click the Save button.

Clicking on the Advanced Filter button again will hide the filters. The filters will show by default if filters have been saved and will hide by default if filters are cleared.

6.3.3 Locking and Unlocking Audits

Locking of audits is not part of the process used by some organizations. For organizations that want lock-down capabilities to ensure audits are not tampered with, the locking feature may be helpful. Audits that have been completed can be locked. A locked audit cannot be modified. This provides assurance that data will not be modified. Locking works as follows:

- An audit must have all questions answered and marked with a status of “Completed” prior to locking. If some questions do not apply, then the user will have to answer “N/A” for those questions rather than leaving them unanswered.
- For organizations using the traditional permissions model only an organization administrator can unlock a locked audit. For organizations using the Compliatrac permissions model only user admins can unlock audits. Unlocking an audit is accomplished by clicking on the **unlock icon** ( ) beside an audit.

- Only a user with access to an audit (creator, reviewer, manager) can lock that audit. This is accomplished by clicking on the **lock icon** ( ) beside an audit.
- Locking an audit does not affect its ability to be archived.

6.3.4 Archiving an Audit

Audits can be removed from the Audits screen by archiving them. As with any listing screen this action does not delete the audit but simply removes it from the listing screen. Any user who has permissions to edit an audit can archive it. Typical users do not, however, have access to the “View Archived” screen and therefore may not permanently delete or unarchive the audit. For organizations using the traditional permissions model only an organization administrator can access archived audits. For organizations using the Compliatrac permissions model only user admins can access archived audits.

6.4 Audit Batches (NextStep-integrated)

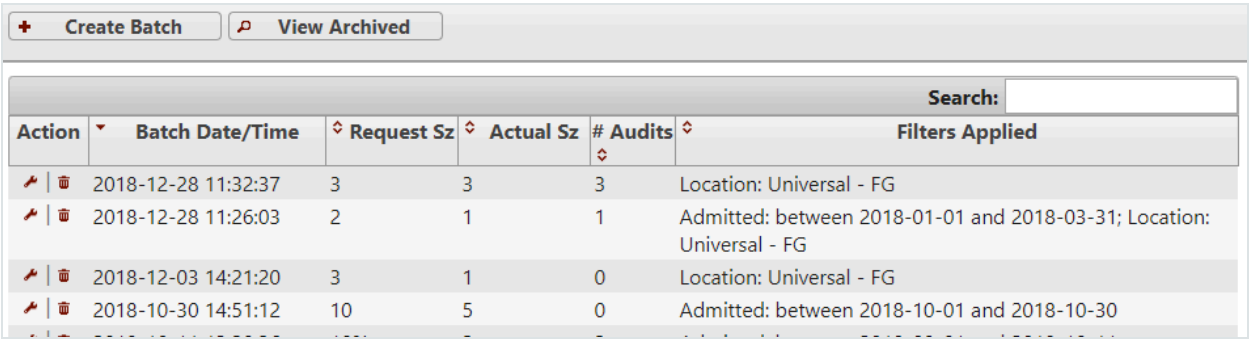
NextStep-integrated customers can create multiple audit headers in a single step by randomly selecting cases directly from the EMR.

6.4.1 Audit Batch Listing Screen

See section Listing Screens above for information on working with features common to many listing screens. To get to the batch listing screen:

- If necessary, click on the **Audits link** (Audits) in the top right corner.
- Click on the Audit Batches button (Audit Batches)

An example of the batch listing screen:

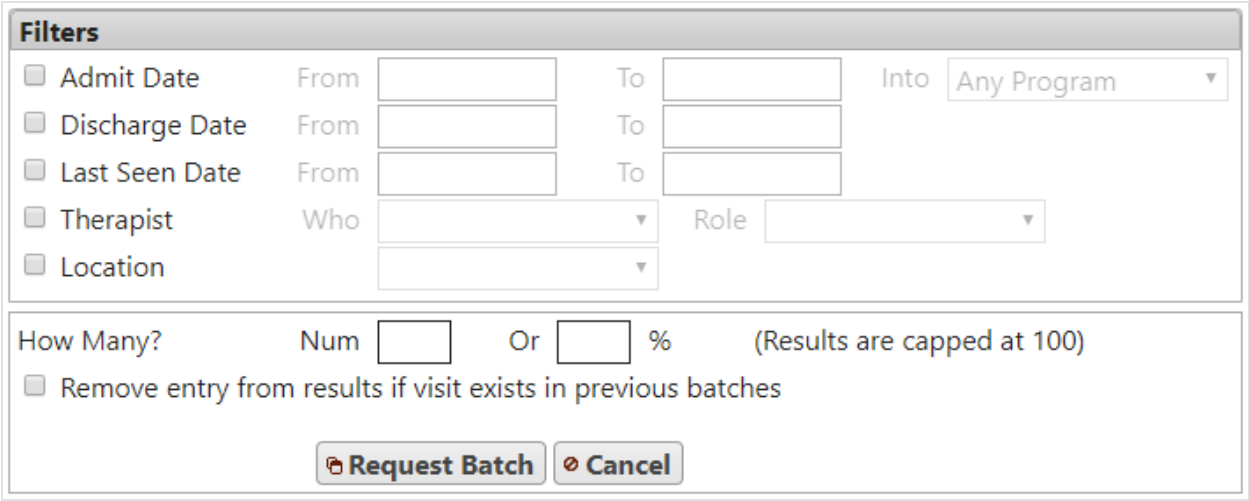


Each batch is a collection of cases from the EMR that have been randomly selected after optionally applying various filters. To work with a batch simply click the wrench icon. To create a batch click the “Create Batch” button.

6.4.2 Creating an Audit Batch

To create an audit batch you will specify how many entries you want included in the batch. This can be given as a number or a percentage of available records. If the specified percentage results in more than 100 records, the results will be capped at 100 for a single batch. If you want to ensure that records in a newly requested batch don't overlap with the same client/visit you can place a checkmark in the appropriate box. If the box is left unchecked then records may duplicate previously batch requests.

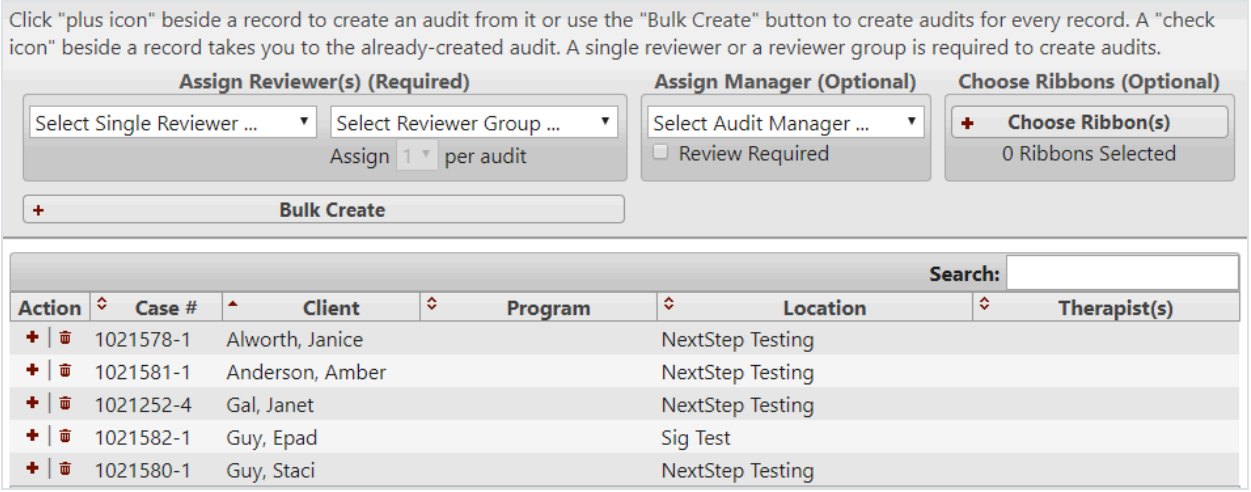
The filters are optional, but can be applied to restrict results to a particular subset of records.



After a batch has been successfully created you will be presented with the batch detail screen.

6.4.3 Working with a Batch

The batch detail screen is the default landing place after a batch is created. It can also be reached from the batch listing screen and clicking the wrench icon beside the batch of interest.



From this screen it is possible to create audits individually or in bulk by following these steps:

1. Specify reviewer(s). A single reviewer can be assigned to all audits in the batch or reviewers can be assigned consecutively from a group of reviewers.

2. Specify an audit manager if using a managed workflow. See section Workflows for more information.

3. Optionally specify one or more ribbons to be included in each audit.

4. To create audits one at a time simply click the **plus icon** for each case. To create audits for the entire batch click the **Bulk Create button**. Upon creating audits the plus icon will change to a checkmark icon that will take you directly to the audit. As with all audits, audits created in this way will appear in appropriate audit lists and task lists.

7 Workflows and the Task List

7.1 Workflows

MOST™ supports several workflows described below:

7.1.1 Unmanaged Audits

- An unmanaged audit will name one more reviewers but no manager.
- Reviewers add ribbons and answer questions. When all questions are answered the Finished button (✔ Finished) is enabled. Clicking on that button will result in the audit's status being moved from "Created" to "Completed".

7.1.2 Passively Managed Audits (no review required)

- Passively managed audits will name an audit manager in addition to naming at least one reviewer. The "Review Required" checkbox is left unchecked.
- The audit manager and reviewers can modify the audit. When all questions have been answered the Finished button (✔ Finished) is enabled. Clicking on that button will result in the audit's status being moved from "Created" to "Completed".
- Specifying a manager will allow the named manager to view progress and participate in the auditing process without them being named as a reviewer.
- An organization can name a default manager who is named by default for each audit. Requests to name a default manager are submitted by sending email to help@mostaccess.com.

7.1.3 Actively Managed Audits (review required)

- Actively managed audits will name an audit manager in addition to naming at least one reviewer. The "Review Required" checkbox is checked.
- The audit manager and reviewers can modify the audit. When all questions have been answered the Finished button (✔ Finished) is enabled. Clicking on that button will result in the audit's status being moved from "Created" to "Submitted for Review". Likewise, the audit status change will automatically be populated in the audit manager's Task List.
- An audit that has been submitted for review will remain in that state until the manager visits the audit and clicks the "Needs Work" button (II Needs Work) or the "Approved"

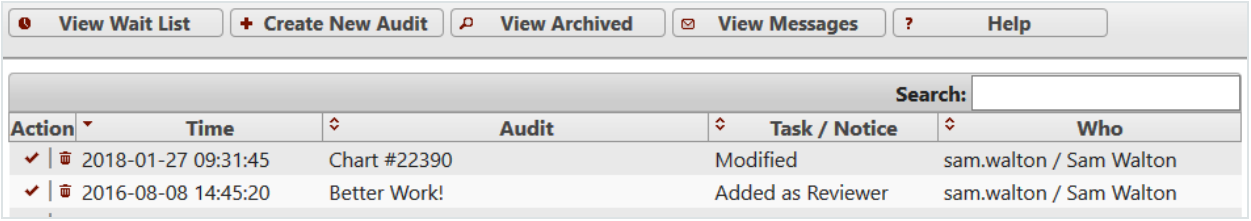
button (Approved).

- Clicking the “Needs Work” button will set the status of the audit to “Reviewed/Needs Action” and will put the status change into the Task List of all audit reviewers.
- Clicking the “Approved” button changes the status of the audit to “Completed” and removes the audit from the Task List of the manager and the reviewers.
- An organization can name a default manager who is named by default for each audit. Requests to name a default manager are submitted by sending email to help@mostaccess.com.

7.2 The Task List

7.2.1 Tasks

When a user first logs into MOST™ they are taken to their personal Task List. The Task List screen can be visited at any time by clicking the Tasks menu option (Tasks) in the menu that appears at the top-right of the screen of each page in the application. See section Listing Screens above for information on working with features common to many listing screens. The task list listing screen look like this:



IMPORTANT CONCEPT: Tasks are shortcuts to audits. The task list shows tasks--not audits. Archiving a task has no effect on audits. The purpose of the task list is to help users keep track of unfinished work.

The task list is automatically populated and modified based on actions in the system. In addition a user can manually manage the task list by archiving tasks using the trash can icon ( ). Previously archived entries can be restored by clicking the View Archived button (View Archived) and then clicking the corresponding restore icon ( ).

Entries are automatically added to a user’s task list when:

- The user has been added to an audit as a reviewer or manager.
- The user is a reviewer of an audit that a manager has indicated as “Needs Work”.
- The user is a manager of an audit that is marked as “Needs Review”

Entries are automatically removed from a user’s task list when:

- An audit for which the user is a reviewer or manager has been marked as “Completed”.
- An audit for which the user is a reviewer has been “Submitted for Review”
- An audit for which the user is a manager has been marked as “Needs Work” or as “Completed”

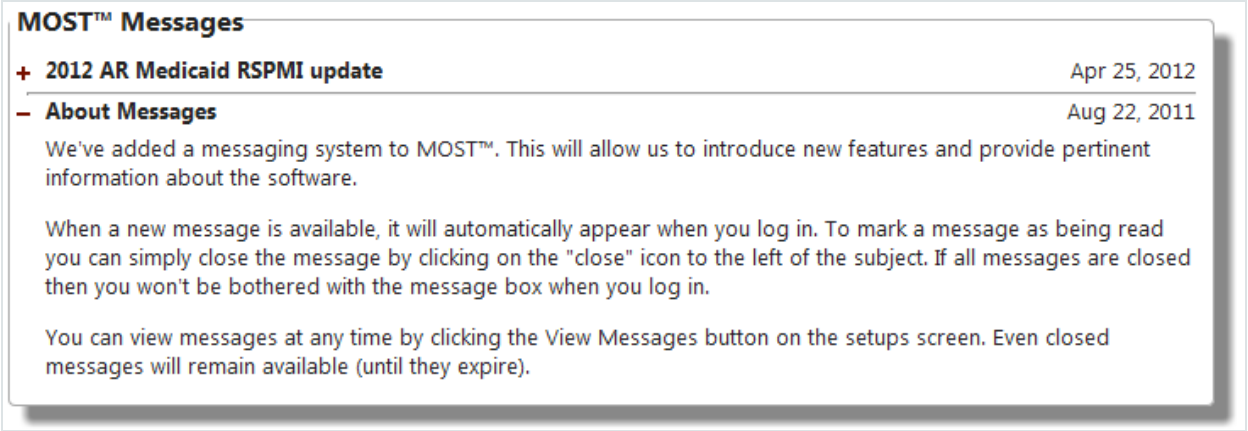
A user can have a notification email sent to them when an item is added to their task list by clicking the Menu button (Menu) and selecting “Preferences”.

7.2.2 The Wait List

In workflows that make use of a manager the wait list will show audits that have been assigned to others but have not been completed. As with the task list, items on the wait list are managed by the application but can be manually removed as needed.

7.2.3 System Messages

When you log in you may be greeted with system messages. Typically these messages are used to convey new features of the software or to notify organization administrators of updates to standards. The screenshot below provides an explanation of the message system in its own words. Notice that one message has been marked as read and, therefore, shows only the title.



If all messages have been minimized then the messages will be hidden by default when a user logs in.

8 Reports Screen

All reports are displayed through a PDF reader, e.g., Adobe reader, so you must have one installed on your computer before a report will be viewable. From the PDF reader you can save a report to disk, print, search contents, zoom, etc. A couple of the reports are optionally available as CSV documents.

To visit the Reports screen:

- Click on the **Reports link** (Reports)

8.1 Reporting Permissions

Typical users can run “Audit Detail” reports and “Audit Listing” reports. However, they can only see reports on audits to which they have been granted access (creator, reviewer, or manager).

Organization administrators (in the traditional permission model) and reporting admins can run reports for any audit and have access to all types of reports documented below.

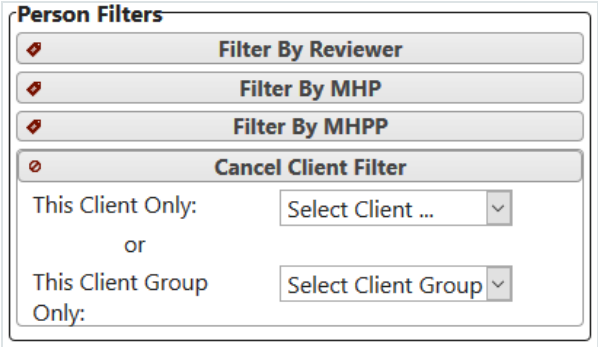
8.2 Common Themes Among the Reports

1. **Report Parameters**—Although the report types are fixed, each report provides a number of options for customization of the report for various purposes. Report parameter values are remembered to facilitate incremental tweaking of parameters to produce the desired result. Each report provides a **Reset Params button** that can be used to restore parameters to their default values.

2. **Risk Analysis**—Reports that have the term “risk” in the name can optionally provide risk analysis based on an acceptable compliance rate you provide. To measure risk you will need to have specified fee values in ribbon headers. Suppose a compliance rate below 90% is considered to trigger risk of recoupment. If that value is given as a report parameter then the report will determine the fees that are in danger of recoupment based on each question set involved in the report. The fee values are set by the organization for each question set.

3. **Filters**—Filters that are available differ from report to report. Filters are used to restrict or reduce the number of results and so when multiple are applied they use an implied logical AND. Some of the available filters are:

    a. Tag Filters and Person Filters: allow results to be restricted to matching a particular tag, tag group, person role, or person role group. Multiple filters can be activated at the same time. The form below shows the drop-down lists that are provided when a filter is activated.



b. Date Range: include results within the specified date range.

c. Question Set Type: show results only for question sets that have the specified type (determined by the organization on the Question Sets screen).

d. Completion: show results for completed or incomplete audits only.

4. **Segmenting Results**—Several reports allow for segmenting results by a particular tag type (e.g., Location) or a person role (e.g., Reviewer or Client) so that results for all relevant entries (e.g., locations, reviewers, clients) can be separated in a single report.

5. **Including/Omitting Unanswered Questions**—If an audit has not been completed the reporting queries can be instructed to ignore those questions in the reports (default behavior). Alternatively, unanswered questions can be included, in which case, the answers are assumed to be “no”.

6. **Question Set vs. Question Set Type vs. Standard**—Some reports allow results to be viewed for a single question set, or for all question sets of a particular type, or for all question sets based on a given standard. This provides significant flexibility in summary reports.

7. **Summary Headers**—Some reports allow entry of summary text to be placed at the top of a report. **The summary text is not saved**, so if the text is needed for multiple report runs then it should be saved in an external document.

8. **Hiding Audit Names**—Reports that display audit names allow those names to be hidden when the report is run. The purpose for this feature is because it is common for audits to be named with a chart number. Omitting the audit name allows the report to be generated without displaying any protected medical information.

9. **Hiding Subjects Containing PHI**—Reports that display audit subjects (people or tags) can optionally hide those values if the specified tag type or person role has been designated as containing PHI. Clicking on the question-mark icon will display a list of tag types and person roles in use by your organization along with whether or not each has been designated as possibly containing PHI. See section Person Roles and Tag Types for additional information.

8.3 Audit Detail Report / Multi Audit Detail Report

This report lists all questions within an audit grouped by answer. This report identifies exact problem areas within a single audit. If an audit is based on multiple question sets then a summary of the results is given. Also, if an acceptable compliance rate is given then problems are highlighted with relevant monetary figures attached (if fees have been used in ribbons). This report can be run in two ways:

1. The Audit Detail Report produces results for a single audit.

- Required parameters: audit, date range.(The date range is used to restrict the size of drop-down list to include only audits performed in that range.)

2. The Multiple Audit Detail Report produces the report for multiple audits at a time. Each detail report can be lengthy, so it is advisable to apply filters appropriately when using this option.

- Required parameters: none. **(Though application of filters is strongly advised! If no filters are provided the size of the report can be enormous.)**

NOTE: Both forms of the details reports allow fee data to be suppressed via a checkbox.

Partial Audit Detail Report

MOST™ Audit Detail Report

Name (Date): Chart #22390 (07/29/2017)
Compliance: 90% (Fees: $80.00)
People: Freud, Sigmund (MHP); [removed] (Client)
Tags: Adult Outpatient (Location)
Scope: Unanswered are Omitted / 'N/A' are Omitted
Comments:

Reviewers
Sergeant, Becky
Normal / Clinical & Non-Clinical
Walton, Sam
Normal / Clinical & Non-Clinical

2011 Mental Evaluation Diagnosis	**1/05/2019**	**Yes**	**No**	**Rate**	**Fee**
Arkansas State Medicaid (Apr 2011)		**20**	**1**	**95%**	**$80.00**

Notes
Documentation of presenting problem was partial, but not complete.

Yes	
Mental Eval/Dx 04* -- Does the diagnosis meet criteria according to the DSM?	*Yes*
Mental Eval/Dx 05* -- Are treatment recommendations given?	*Yes*
Mental Eval/Dx 06* -- Are the recommendations appropriate for the needs of the client?	*Yes*
Mental Eval/Dx 07* -- Does the documentation show services were individualized to the beneficiary? (duplicated notes not allowed)	*Yes*

8.4 Question Set Detail Report

This report provides a monthly snapshot of how an organization (or location or provider) is doing on a per question basis. It shows each question in the question set broken down by number of cases that included yes or no answers per month.

- Required parameters: question set or question set type or standard, term, start month, and number of months.
- The option of including comments on a per-question basis can provide specific insights to problem areas.
- The term parameter can be set to either Week or Month.
    - When set to **Month** (default) results are collected for each month in the date range.
        - Regardless of day of month entered in Start Month, the report defaults to first day of month (example: start date of 3/15/10 will show 3/1/10-2/28/11).
        - Number of Months maximum is 12 (default) and minimum is 1.
    - When set to **Week** results are collected for each week in the date range.
        - The range for the first week starts on the exact date you specify.
        - Number of Weeks maximum is 12 (default) and minimum is 1.
- A summary chart showing percentage compliance for each month is also included.

Partial Question Set Detail Report

MOST ™ Question Set Detail
for Test Organization
Comments: Not Included / Location: All / Provider: All

Mental Health Evaluation/Diagnosis
Arkansas Medicaid Services (Jan 2011) / Assessments

Standard	Question	Jan 2011	Feb 2011	Mar 2011	Apr 2011	May 2011	Jun 2011	Jul 2011	Aug 2011	Sep 2011	Oct 2011	Nov 2011	Dec 2011	Totals
		2 Cases												2 Cases
Mental Health Eval	Were start and stop times of the face to face encounter with the beneficiary and the interpretation time for diagnostic formulation documented?	100.0% 2 Cases												100.0% 2 Cases
Mental Health Eval	Was the reason for referral documented?	100.0% 2 Cases												100.0% 2 Cases
Mental Health Eval	Was identifying information documented?	0.0% 2 Cases												0.0% 2 Cases
Mental Health Eval	Was the presenting problem (s) documented?	50.0% 2 Cases												50.0% 2 Cases
Mental Health Eval	Was the history of presenting problems(s) documented?	0.0% 2 Cases												0.0% 2 Cases
Mental Health Eval	Were duration, intensity and response to prior treatment documented?	100.0% 2 Cases												100.0% 2 Cases

8.5 Answer Totals Report

The purpose of this report is to provide a concise view of compliance for individual questions. It is similar to the Question Set Detail described above except that totals are given for any arbitrary date range rather than grouped by month to show a pattern.

- Required Parameters: question set or question set type or standard, start date, and stop date.
- This report is available in both PDF and CSV format.

Partial Answer Totals Report

MOST™ Answer Totals Report

Organization: Demo Organization, Inc.
Question Set: All from Arkansas State Medicaid (Apr 2011)
Date Range: Jan 01, 2017 thru Jul 17, 2018
Options: *Notes:* Included; *Audit Names:* Included; *N/A Answers:* Included; *Unanswered Items:* Omitted
Person Filters: (none)
Tag Filters: (none)

2011 Individual Psychotherapy Arkansas State Medicaid (Apr 2011) / Regular Question Set	**N/A**	**Yes**	**No**	**Rate**
IT 01* -- Was the treatment specifically related to achieving goals identified on the client's treatment plan?	7	104	13	88%
IT 02* -- Was the service congruent with the interventions articulated on the most recent treatment plan?	5	106	16	86%
IT 03* -- Did the service work toward alleviating identified symptoms, maintaining or improving level of functioning, and/or preventing deterioration?	5	97	22	81%
IT 04* -- Was the service congruent with the age and strengths and necessary accommodations of the client & family? (Help: Examples of accommodations may include those necessary for physical disabilities such as translation	8	102	19	84%

8.6 Risk Detail Report

The purpose of this report is to show on a per-audit basis what recoupment risks exist. The monetary data is extracted from the fee value stored with each question set.

- Required Parameters: question set or question set type or standard, start date, and stop date.
- This report is grouped by question set (or keyword or section if a single question set is selected) and displays number of yes and no answers along with a compliance rate. In addition a risk value is specified based on the provided acceptable compliance rate.

Partial Risk Detail Report (cutoff at 90% compliance)

2011 Individual Psychotherapy
Regular Question Set / Arkansas State Medicaid (Apr 2011)

Audit Name (Tag)	Date	Subject	#Yes	# No	Rate	$ Risk	Reviewer(s)
Chart #16595 (2016-12-17)	01/01/17	Jackson, Samuel (MHP); Thompson, Fred (MHPP); Home Office (Location)	19	3	86%	$40	Walton, Sam
Chart #27847 (2016-12-16)	01/01/17	Classick, Teri (MHP); Adult Outpatient (Location)	23	0	100%	$0	Freud, Sigmund
Chart #23488 (2016-12-19)	01/02/17	Classick, Teri (MHP); Home Health Center (Location)	16	8	66%	$40	McKay, Sarah
Chart #27207 (2016-12-20)	01/02/17	Sergeant, Terry (MHP); Home Office (Location)	14	4	77%	$40	Tucker, Sheri

8.7 Question Set Summary Report

The purpose of this report is to provide compliance rate data across a question set, a type of question set or an entire standard. If an acceptable compliance rate is provided then monetary risk data is also provided.

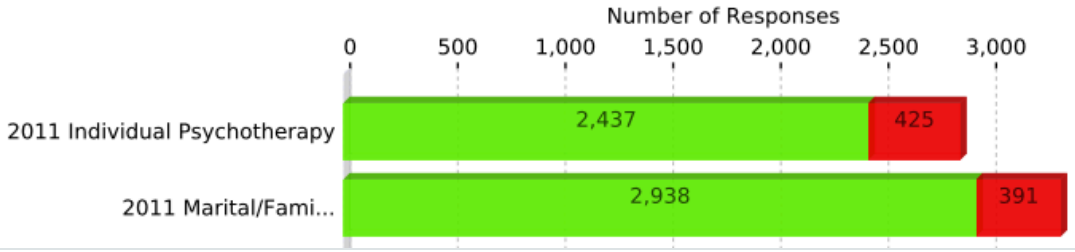
- Required Parameters: question set or question set type or standard, start date, and stop date.
- Grouping of results is dependent upon whether a single question set has been selected or not. If the report covers only a single question set then categories are based on keywords (or sections in the case of custom-only question sets). If the report is based on a question set type or an entire standard then results are grouped by question set.
- The bottom of the report shows a bar chart that identifies the number of responses for each question set/keyword/section, broken down by yes (green)/ no (red) answers.
- A single question may be represented more than once in the summary totals because there may be more than one keyword associated with a question. Therefore, if you sum the total number of questions in each keyword category you may obtain a sum greater than the total number of questions answered. The percentages per keyword, however, will be meaningful.

Partial Question Set Summary Report

MOST™ Organization/Location Summary Results

Organization: Demo Organization, Inc.
Question Set: All from Arkansas State Medicaid (Apr 2011)
Date Range: Jan 01, 2017 thru Jan 05, 2019
Acceptable Rate: 90%
Person Filters: (none)
Tag Filters: (none)

Regular Question Set	Total	# Cases	# Risk	$ at Risk
2011 Individual Psychotherapy	85%	132	63	$2,520
2011 Marital/Family Psychotherapy	88%	142	55	$3,300
2011 Mental Evaluation Diagnosis	87%	118	46	$0
2011 RSPMI Collateral MHP	86%	130	54	$5,896
2011 RSPMI Group Meds: Physician	85%	131	64	$2,457
Edit QS Test 2	86%	136	59	$0
Test Ampersands	89%	112	39	$0
Subtotal	87%	901	380	$0
Overall	**87%**	**901**	**380**	**$14,174**



8.8 Audit Listing Report

The purpose of this report is to list audits in the database. A wide variety of filters are provided so that lists can be customized. Among other things, this report can be used to identify what providers have been audited in a specified period of time. This report also allows segmented subreports to highlight audit coverage by a variety of factors.

- Required Parameters: none.
- This report is available in PDF and CSV formats.

Partial Audit Listing Report

MOST™ Audit Listing

Organization:	Demo Organization, Inc.
Question Set:	All Question Sets
Question Set Type:	All Question Set Types
Completion:	Both Complete and Incomplete Audits
Date Range:	Jan 01, 2017 thru Jan 04, 2019
Person Filters:	(none)
Tag Filters:	Region: Health Related
Other Filters:	(Clinical: All) (Role: All)

Audit Name	Date	People	Tags	Reviewer(s)	Rate	Done
Chart #12838	01/01/17	Freud, Sigmund (MHP)	Home Health Center (Location)	Sergeant, Terry; Harrison, Arnie	92%	93%
Chart #16595	01/01/17	Jackson, Samuel (MHP); Thompson, Fred (MHPP)	Home Office (Location)	Walton, Sam	86%	95%
Chart #45762	01/01/17	Sergeant, Terry (MHP)	Home Health Center (Location)	Classick, Teri	87%	100%
Chart #47174	01/01/17	Jones, Samuel (MHP)	Home Health Center (Location)	Tucker, Sheri	100%	94%
Chart #50335	01/01/17	n/a (MHP)	Psychiatric Ward (Location)	Classick, Teri	85%	95%
Chart #51312	01/01/17	Sergeant, Becky (MHP)	Home Health Center (Location)	Walton, Sam	18%	100%

8.9 Printable Question Set Report

The purpose of this report is to produce a printable version of a question set. There are a variety of formatting options. If a printed question set is composed of custom questions it is possible to provide an organization logo to help@mostaccess.com to allow the questions to be identified to your organization.

- Required Parameters: question set.

Partial Audit Listing Report

Brief Behavioral Health Status Exam

_____ 1. 05* Was the brief behavioral health status examination provided, at a minimum, by a licensed practitioner of the heaaling arts or master's level certified addictions professional?

_____ 2. 06* Does the Brief Behaviral Health Status Examination documentation include the purpose of the exam?

_____ 3. 07* Does the Brief Behavioral Health Status Examination documentation include the setting of the exam?

9 Glossary

Captcha Code: is a type of challenge-response test used to ensure the response is generated by a

human and not generated by a computer.

Confirmation Code: A unique, computer generated captcha code presented to a user if the user exceeds the maximum number of unsuccessful login attempts. The presented captcha code must be re-entered successfully along with the username and password.

Gold Thread-Qualitative: *(Evaluation, Treatment Plan, Services provided, Progress Notes, Treatment Plan Review, Discharge Planning)*

“Gold Thread” is a term coined by mental health consultant David Lloyd, of MTM Services. It refers to the concept that risk free and clinically sound documentation in a medical chart demonstrates that each service ordered on the treatment plan comes from a need identified in the diagnostic assessment; that each service, including frequency and duration, is medically (clinically) necessary to improve the client’s functioning; and that the progress notes chart directly to the plan of care, justifying the charge to the payer. Anyone who audits for Gold Thread should be terminally licensed in his/her field meeting the requirements of Mental Health Professional.

Gold Thread consistency establishes a legal justification for the services provided. Medical necessity should drive every treatment decision from intake to discharge.

Icon: a graphic symbol (usually a simple picture) that denotes a program or a command or a data file or a concept, e.g.,

Answer Questions View Report Add/Edit Notes Edit Audit Archive Help Back

PDF Reader: PDF Reader: (*Portable Document Format)* is a file format in which reports within this software are displayed. In order to properly view the reports a user will need to have installed Adobe PDF Reader (free) on their computer.

Question Set: Groups of questions based on either standards, e.g., Joint Commission, or custom questions. A Question Set may be based solely on standards, standards and custom questions combined or custom questions only.

Ribbon: A collection of questions in the interface that can be collapsed to a single line or expanded to reveal all questions. Individual ribbons can be opened or closed by Clicking on the ribbon header.

***Silver Thread-Quantitative*:** "Silver Thread" is a term used to mean *the presence, absence, and timeliness of documentation.* The medical record staff members often conduct Silver Thread audits.

10 Frequently Asked Questions

1. What are ribbons?

   Ribbons are found in Audits and they represent ***Sections*** which can be minimized or expanded.

2. What happens if the organization has an employee who resigns?

   If an employee resigns or retires the employee should be archived.

3. Where do the overall comments of an Audit show up in the report?

   The overall comment appears at the top of the report. If the comment is for a single question, it will appear below the question in the report.

4. Is the data kept in MOST secure?

   The server that stores your data is hosted in a professionally managed, secure data center. Data is backed up nightly. All accounts are password protected and the entire application runs over https (the same encryption scheme used to secure online credit card transactions). Data at rest is also encrypted.

5. What is an Organization Administrator?

   In the Traditional Permissions Model this is one or more users at each organization who oversee creation of user accounts and other administrative aspects of the software.

6. Some drop-down boxes are pretty long. Is there a fast way to find the entry I want?

   Click on the drop-down and then type the first few characters of the item you want. Then use the mouse to select the item.

7. When a user has been archived will their data still show up in reports?

   Yes.

11 Appendix

11.1 Thank you

Thank you for your decision to use **MOST™ (Measure of Success Tracking)!**

MOST™ is a tool initially designed for the healthcare industry but can easily adapt to any setting that operates under a set of accreditation standards or regulations. This easy-to-use software allows you to audit your agency in a comprehensive, clear, and concise manner. It even allows you to develop your own sets of questions. MOST™ lets you enter data and complete audits without completing “paperwork.” In addition, it consolidates the data into comprehensive reports. MOST™ permits you to measure the success of individuals, teams, units, facilities and organizations and provides you with feedback about how your agency is meeting internal and external standards.

For more information visit: https://www.mostaccess.com

11.2 Supported Browsers

Supported browsers include Internet Explorer versions 9 and up, Firefox, Chrome, and Safari. So, there is no software to install and no need to deal with updates because they happen on the server automatically. The URL for the application is provided to your organization during the setup process. Once your organization has been set up on MOST™ a designated organization admin can add user accounts as needed. Instructions for configuring your account are sent by email as part of the account creation process.

MOST™ provides password protected access within an SSL connection, so the data is secure. Backup images of the server are taken daily and daily rolling backups of the database are rotated on a weekly schedule. Software and operating system updates are installed regularly.

The MOST™ system uses a web-based confidential and secure site that allows authorized users to complete audits and review data (reports). Reports are available for the individual, program or organization as soon as audits are completed. This allows for real-time feedback.

11.3 MOST™ Mobile

MOST™ Mobile allows users to create and complete audits from their small-screen device. To use the mobile interface simply visit the usual URL and you will be automatically directed to the mobile site. The mobile site does not provide complete access but does allow users to create and complete audits.

11.4 Benefits of Using MOST™

Audits

- Proof of intense, ongoing corporate compliance efforts
- Increased accountability to Medicaid
- Increased accountability to external accrediting agencies
- Increased accountability to governing board
- Provide organization wide, program and individual reports for Leadership
- Identification of trends and patterns of *care* and associated risks.
- Identification of trends and patterns of quantitative compliance.

Patient Care

- Helps determine if medical necessity is established
- Helps identify the presence or absence of a diagnosable mental illness
- Provides documentation of peer review activities to enhance quality care
- Helps clarify expectations and quality of clinical practices
- Examines processes and outcomes of care

Staff Development

- Aides in effective supervision of individuals and programs
- Identifies training needs
- Provides peer review documentation to comply with regulatory requirements
- Provides documentation for competency evaluations
- Provides ongoing education/training for providers
- Provides focus on clinical support rather than clinical demand (productivity)

Loss Prevention

- Reduces potential liability
- Reduces potential recoupment
- Monitors quantitative requirements

- Improves the potential for increased retention of professional staff when MHPs are empowered with knowledge, training and development

Helpful Auditing Hints

1. **Comment Section**

- Comment on all "**Not Met**" criteria to make the audit more educative and instructive.
- In addition, comment on "**Met**" criteria if there can be an educative and instructive component. Often the criterion is met, but barely, and comments can help the provider know how to document/communicate better.
- Comments help identify training needs for the individual as well as organization-wide.

2. **Case ID**

   When entering the Case ID in an audit, include the location and last name of provider e.g, SS (location) 56789 (case number) Reed (provider last name)… SS 56789 Reed.

3. **Providers**

   It is important to score only areas for which the provider is responsible e.g., a Mental Health Professional (MHP) should not receive a lower score because the Psychiatric Diagnostic Assessment (PDA) is lacking. It might be better to complete two (2) audits on one chart i.e., one audit for the MHP and one for the psychiatrist addressing only the areas for which each is responsible. The MOST™ software will not allow you to use the same (exact) ID number twice so one suggestion is to type PDA after the case ID for the psychiatric audit.