MOST™ User Manual

Version 7.4.0 (Oct 14, 2026)

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 with the standards an organization is held to. Most organizations find out where they stand from someone else: a surveyor, a payer, a complaint. MOST™ is how you find out first, by making it practical to audit yourself, all year, against the requirements that actually apply to you.

To that end the two primary functions of the application are auditing and reporting, and they make a cycle:

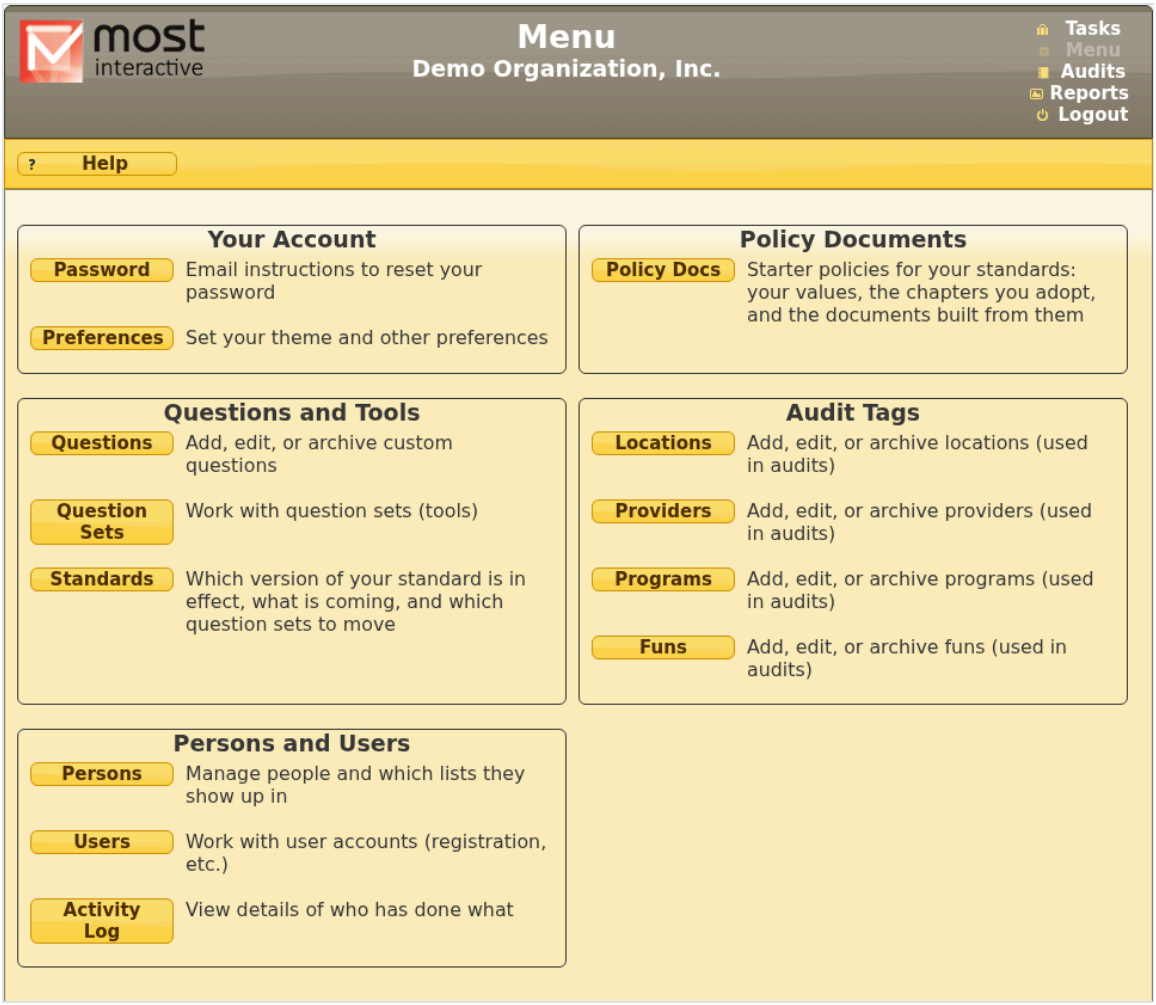
1. **Build your question sets**: the requirements you intend to check, in the words your staff use.
2. **Audit against them**: a reviewer answers each question Yes, No or N/A, adding comments and attaching evidence, on a desktop or on a phone.
3. **Record what you find**: answers, comments and reviewers are held against the audit, which carries its own date and its subjects (the program, location, provider or client being audited).
4. **Report where you stand**: reports show compliance by question, by standard, by program and over time.
5. **Fix it, then audit again**: re-run the audit and compare the reports. The change either shows up in the numbers or it doesn't.

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 (see Questions from Standards). An audit can include one or more question sets and identifies one or more subjects (persons or entities that are being audited).

Organizations that use the Joint Commission standards also have starter policy documents: a written policy for each chapter of the standard and the registers that go with it, built from what you tell MOST™ about your organization. See Policy Documents.

1.2 The Menu

Most of the screens in this manual are reached from the **Menu link** in the top-right corner of every screen. The Menu shows only what your permissions allow, so yours may have fewer boxes than this one, which is an organization admin's:



1.3 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 or 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@mostaccess.com

1.4 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.

1.5 What’s New

This manual describes MOST™ as of the version on its title page. Each release since the last edition of the manual (v6.3.1) is listed here, newest first, with the sections that describe it.

v7.4.0. Two-step sign-in, and stronger protection for every account. After your password, MOST™ can ask for one more thing: the PIN, face or fingerprint you use to unlock your computer, a security key, or a number from an app on your phone. Set it up from Menu > Two-step sign-in; a step-by-step guide helps you choose. It is required now for global and group administrators, from 16 January 2027 for organization and user administrators, and from 16 February 2027 for the other administrators; everyone else is invited to use it. After seven wrong passwords or codes in 15 minutes an account is locked for 15 minutes. Nobody can change their own permissions, and in organizations using the traditional permissions model only an organization administrator can make someone an organization administrator. See Two-Step Sign-In, Locked Accounts and Creating and Managing Accounts.

v7.3.0. Ready-made question sets, and chart review. **Import Question Set** on the Question Sets list offers ready-made question sets from the standards your organization uses: chart review sets, which check one person’s record, and survey preparation sets for each service or program. Only the sets that fit what your organization does are listed, and questions that don’t apply to it arrive unticked. A question set can be marked for **chart review**: its audits and reports then show each question in the wording written for reviewing one chart, where the standard provides one. See Importing a Question Set and Chart Review.

v7.2.0. CARF editions your organization chooses. CARF publishes a new manual each year, and you are surveyed against the one your survey falls under, so your organization works from the CARF edition it has chosen and switches to a newer one on the Standards Dashboard when its survey calls for it; nothing moves by date. Your question sets on an earlier edition keep working, and you promote the ones you still use to your edition, as new question sets with the same keywords and your own questions. Starter policy documents for CARF Behavioral Health follow your organization’s edition. Where your organization uses more than one standard, the Standards Dashboard and the Policy Documents page choose it from a dropdown. See CARF Editions and Policy Documents.

v7.1.4. Role values: usually a title, sometimes a named party. Most Role values in the policy documents ask for a title, such as Program Director, not a person’s name. A few ask for a named party because the requirement does: an outside firm or contractor, such as legal counsel, or the holder of a licence or certificate, such as the pharmacist-in-charge. See Most-Used Values.

v7.1.3. Clearer answers on the policy documents screens. What This Organization Does offers two choices, Include and N/A; once an answer has been chosen it can be switched but not undone. Each group of values is shown once. See What This Organization Does.

v7.1.2. What each new edition changes, in plain words. From the Joint Commission's 1 Jan 2027 edition on, a new edition comes with a written summary of what it changes, shown on the Standards Dashboard and, for what it means to your documents, on the Policy Documents page. See The Standards Dashboard and When a New Edition Arrives.

v7.1.1. The Standards Dashboard (Menu > Standards): the version of your standard in effect, any version on its way and what it changes, and your question sets, with a recommendation for each one still on an older version. Each question set's history (View History) replaces the Standard Updates screen. See The Standards Dashboard.

v7.1. Question sets that follow their standard to each new version. A new version of a standard takes effect on its date, and question sets built on the version in effect move to it by themselves. Audits already started keep their questions, and reports by standard cover every version. See Question Sets and Versions of a Standard.

v7.0. Starter policy documents for the Joint Commission, and a stronger audit trail. When a reviewer answers No on a Joint Commission question, MOST™ says which policy document or register covers that requirement. The activity log is chained and copied daily to locked off-site storage, and has its own permission. See Policy Documents, Answering Questions and Searching the Activity Log.

v6.3.2. A Recent Use report for MOST™ administrators. No change for organization users.

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)
- Permissions to view the activity log and run the tamper report (log admin)
- Permissions to fill in the policy documents' values and choose their chapters (policy 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, view the activity log, fill in the policy documents, 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:

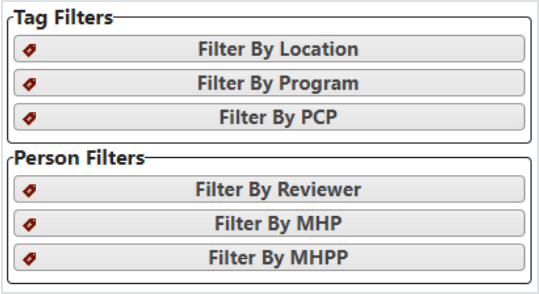
- A button is added to the “Audit Tags” group on the Menu screen.
- The tag type is included as an option for specifying an audit subject.
- The tag type is listed as an option for “Advanced Filters” on the audit listing screen.
- The tag type is listed as a potential filter for many reports.

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.

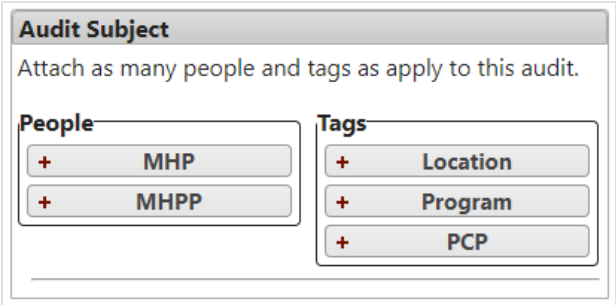
2.2.3 An Example

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 Locked Accounts

After seven wrong passwords, or wrong two-step sign-in codes, in 15 minutes, an account is locked for 15 minutes. The login screen says how long is left. The lock ends by itself; resetting the password (see Forgotten Passwords) ends it at once.

3.1.5 Logging Out

Users will be automatically logged out after 30 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 Two-Step Sign-In

With two-step sign-in, MOST™ asks for one more thing after your password: the PIN, face or fingerprint you use to unlock your computer (a **passkey**), a **security key** such as a YubiKey, or a 6-digit number from an **authenticator app** on your phone. Someone who learns your password still can't get in.

3.2.1 Who Needs It

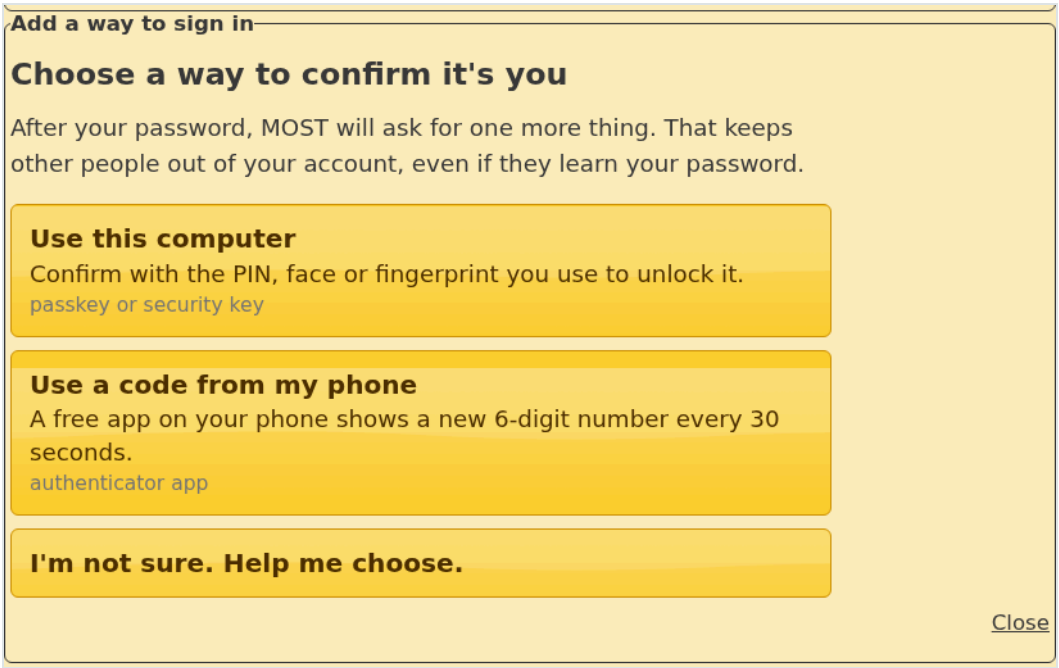
- **Global and group administrators** must use it. The first time they sign in without it, MOST™ asks them to set it up before going on.
- **Organization and user administrators** are asked at each sign-in until 15 January 2027, and must use it after that date.
- **Question, report, list, log and policy administrators** are asked at each sign-in until 15 February 2027, and must use it after that date.
- **Everyone else** is asked at each sign-in, and may use it or not.

Users of **NextStep-integrated** organizations who open MOST™ from NextStep are not asked: NextStep has already signed them in.

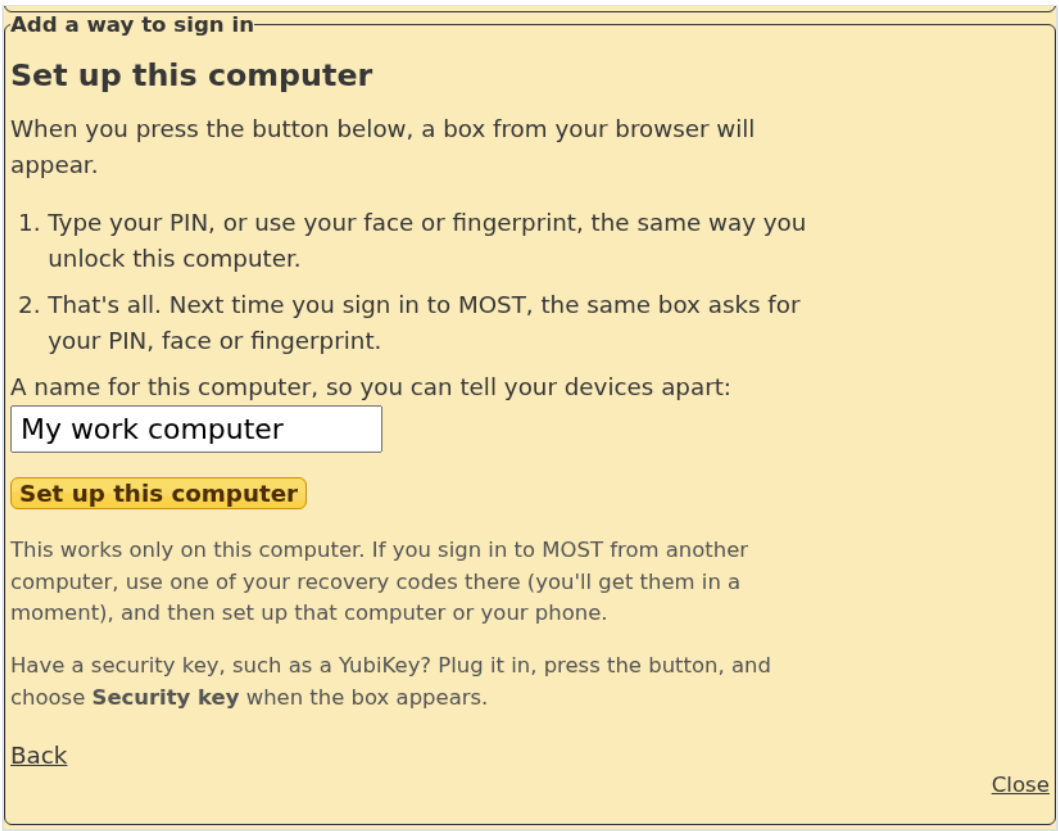
3.2.2 Setting It Up

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

- Click on the **Two-step sign-in button** under Your Account. (When MOST™ asks you to set it up at sign-in, the same guide opens there.)
- Choose a way, or **I’m not sure. Help me choose.**



Use this computer sets up a passkey on the computer you are using. When you press **Set up this computer**, a box from your computer appears: on Windows, choose **This Windows device** if it asks where to save the passkey, then type your PIN or use your face or fingerprint, the same way you unlock the computer. To use a security key instead, plug it in, press the button, and choose **Security key** when the box appears; then touch the key. A passkey on a computer works only on that computer.



Use a code from my phone asks what kind of phone you have and shows the steps for it. An iPhone can do this by itself in its **Passwords** app; on an Android phone, install **Google Authenticator** from the Play Store. Any authenticator app works. Scan the square code MOST™ shows (or type the key under it), then type the 6-digit number the app shows.

When the first way is set up, MOST™ shows ten **recovery codes**. Each lets you in once, in place of your phone or computer, if you lose your phone or sign in from another computer. Print them or write them down and keep them with your important papers: they are shown only once.

3.2.3 Signing In

After your password, MOST™ asks for the way you used most recently. Links under it switch to another way you have set up, or to a recovery code. A wrong code counts toward the lock (see Locked Accounts).

If you sign in with a recovery code, MOST™ takes you to the Two-step sign-in page so that you can set up the computer or phone you are using, and won't need another code next time.

3.2.4 Managing Your Ways to Sign In

Menu > Two-step sign-in lists the ways you have set up. Every change there asks for your password.

- **Add a way to sign in** opens the guide again. Having a second way (a passkey on another computer, a security key, or your phone) means you are never stuck.
- **Move to a new phone** moves your authenticator app to a new phone.
- **Remove** removes one way. If two-step sign-in is required for you, your last way can't be removed.
- **Make new recovery codes** replaces your codes; the old ones stop working.
- **Turn off two-step sign-in** is there only when it isn't required for you.

3.2.5 Lost Phone or Key

If you have lost every way to sign in, and your recovery codes, ask an administrator to **reset** your two-step sign-in (see Resetting Two-Step Sign-In). You then sign in with your password, and set it up again if it is required for you.

3.3 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:

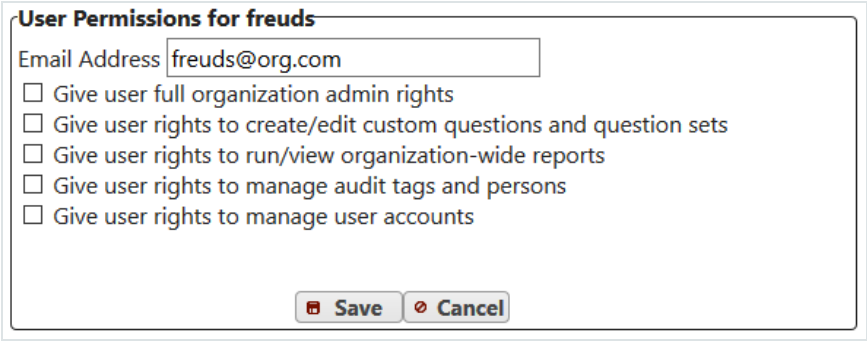
- If necessary, click on the **Menu link** (Menu)
- Click on the **Users button** from the Menu page.

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.
- Nobody can change their own permissions; another administrator does. On your own permissions page only your email address can be changed.

3.3.1 Permission Options for Traditional Permissions Model

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

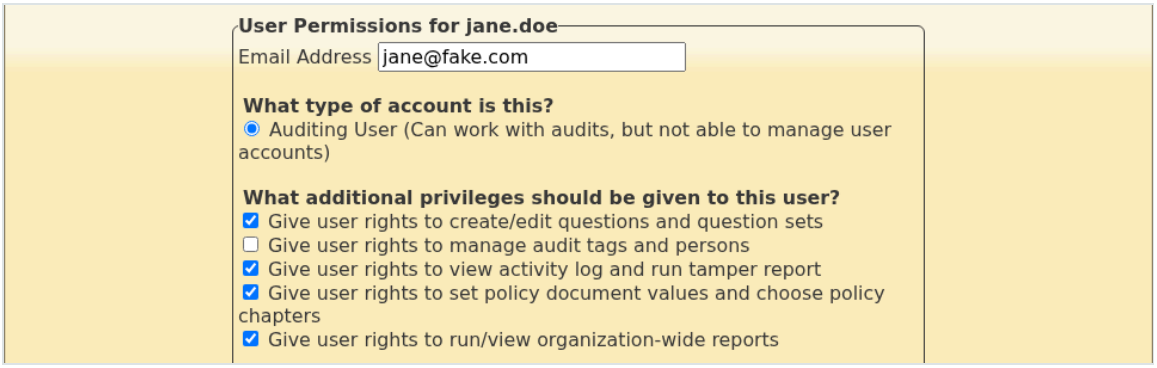


Assigning full organization admin rights will automatically provide all other rights. For non-organization admins the remaining rights can be granted or revoked individually. Only an organization admin can give or take away full organization admin rights; a user admin sees that box but can’t change it, and can’t change an organization admin’s permissions. The screenshot above predates two rights added in v7.0, which appear with the others:

- **Give user rights to view activity log and run tamper report**
- **Give user rights to set policy document values and choose policy chapters**

3.3.2 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. Either kind of account can also be given question, list, log and policy admin rights; only an auditing account can be given report admin. The permissions screen for an audit user looks like this:



3.3.3 Resetting Two-Step Sign-In

When a user has lost every way to sign in and their recovery codes, an administrator can reset their two-step sign-in:

- Open the user's permissions page from the Users listing screen. It shows **Two-step sign-in: on** with a **Reset** button.
- Click **Reset** and enter your own password.

The user's ways to sign in and recovery codes stop working. If two-step sign-in is required for them, their next sign-in asks them to set it up again; otherwise they can set it up when they choose. Organization admins and user admins can reset users of their own organization, except that only an organization admin can reset another organization admin's. Nobody can reset their own. The reset is recorded in the activity log.

3.4 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)
- Any user given the right to view the activity log and run the tamper report (log admin), in either 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.

3.4.1 Log Tampering Features

Each entry in the activity log carries an error detecting code calculated from the entry itself and from the entry before it, so an entry that is changed, removed, or inserted from outside the application breaks the codes from that point on. Once a day a copy of the latest code is saved outside the database, where it cannot be changed or deleted. Any entry that has been modified has a conspicuous error indicator on this screen, 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 checks every entry in the log, compares the log with the saved copies, and reports any entries that were modified, removed, or inserted. The number of entries in the activity log can be large so it may take some time for the report to complete.

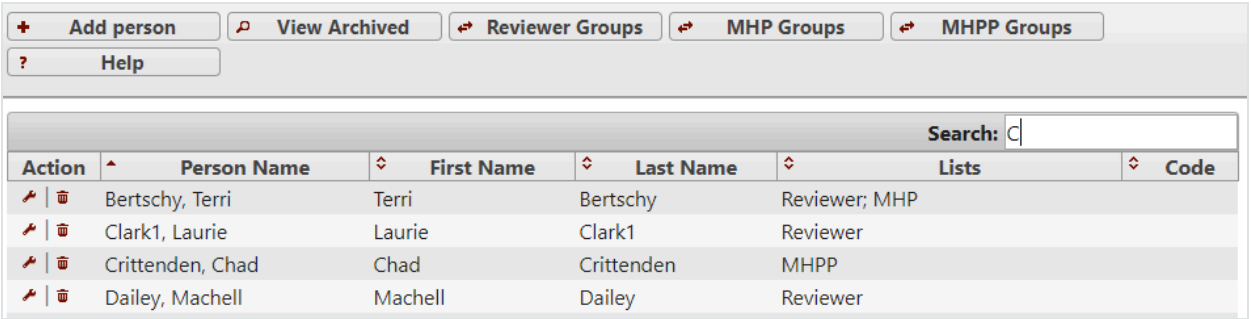
It is unexpected for the report to indicate any findings. For that reason, a non-clean report should be reported to help@mostaccess.com.

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:

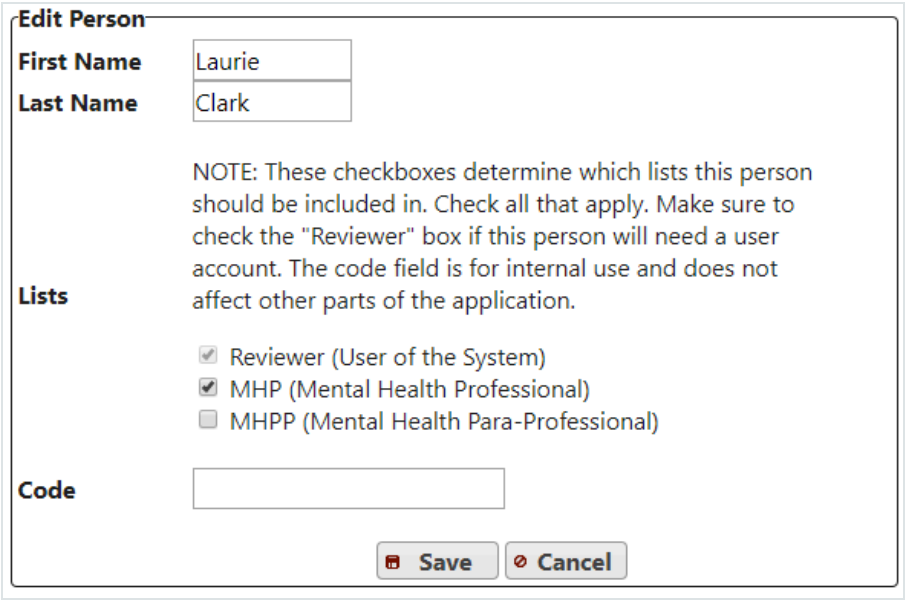
- to modify the entry
- to archive the entry

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:

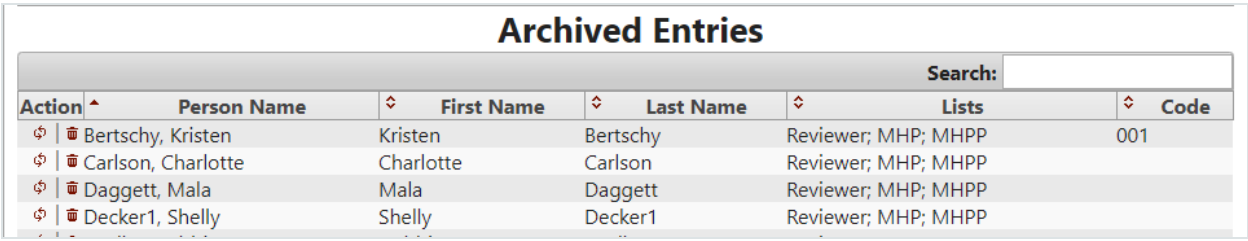


The code is not used by the application but is provided as an option to store additional text regarding persons that can aid searching on the listing screen.

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:

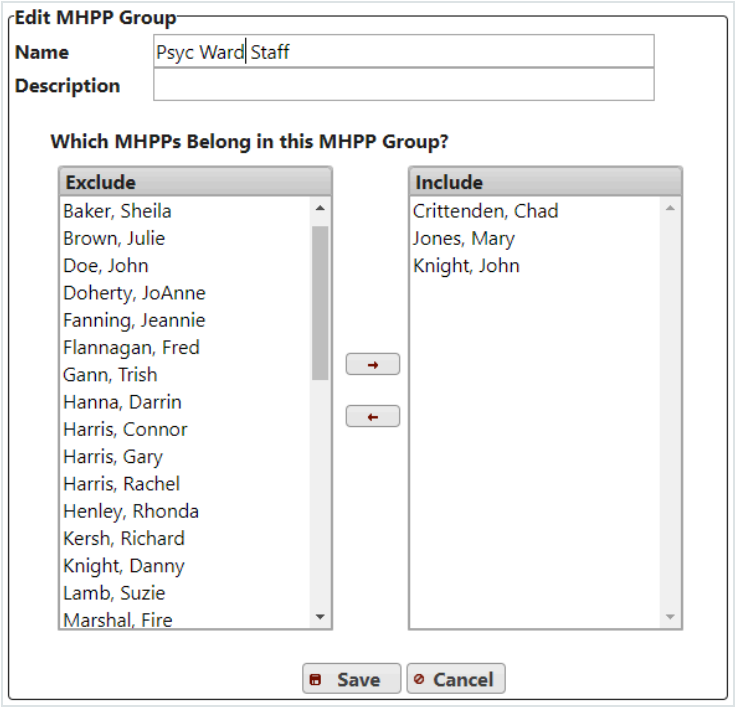


If an entry has been archived accidently it can be restored by clicking the corresponding restore icon . To **permanently delete** an entry from the system you can click the trash can icon from the list of archived entries. You will not be able to permanently delete entries

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

4.1.4 Working with Groups

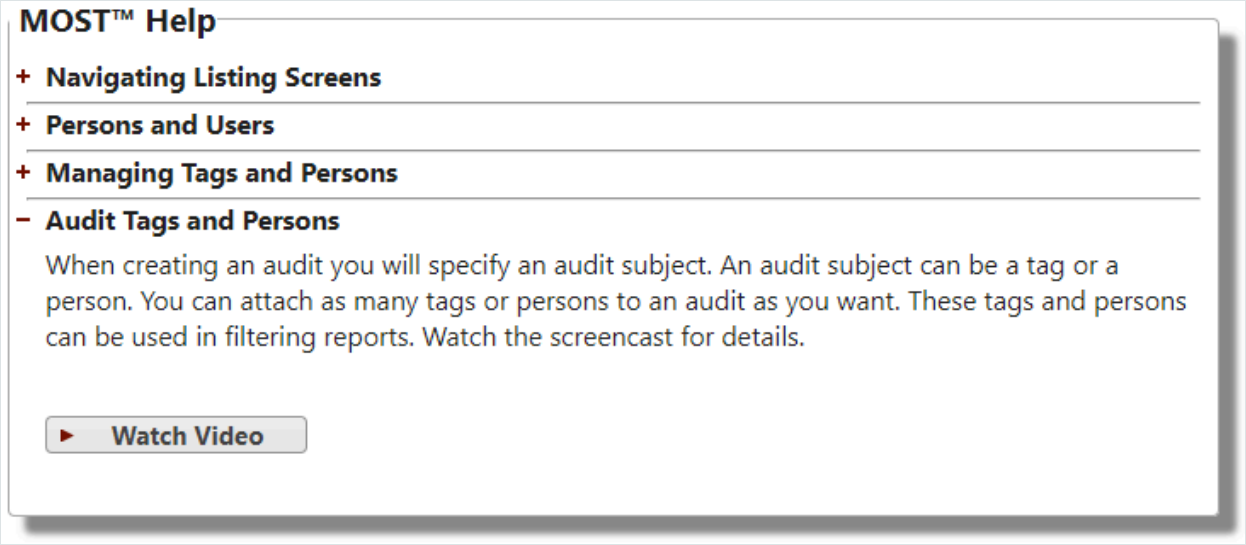
Groups of items are used through MOST™ to facilitate flexible filtering in reports. As an example, you may want to view auditing results for all paraprofessionals that work with a given therapist. Or, you may want to see a list of audits completed by a particular group of reviewers. In either case you'll 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.

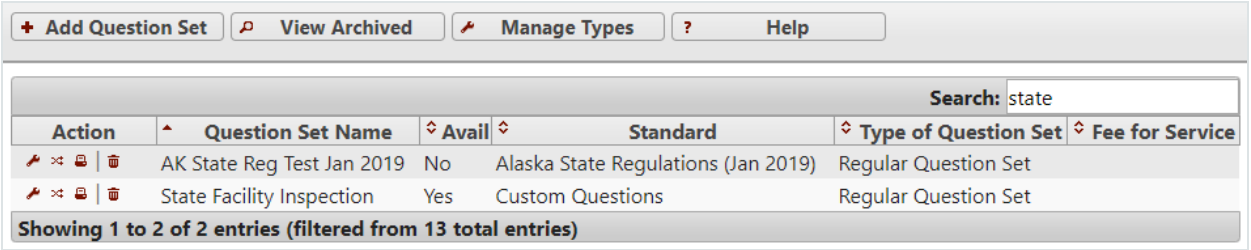
5.1 Question Sets

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. The Standard column names the version of the standard a question set is built on, for example *Joint Commission (Jul 2026)*; see Question Sets and Versions of a Standard. **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.

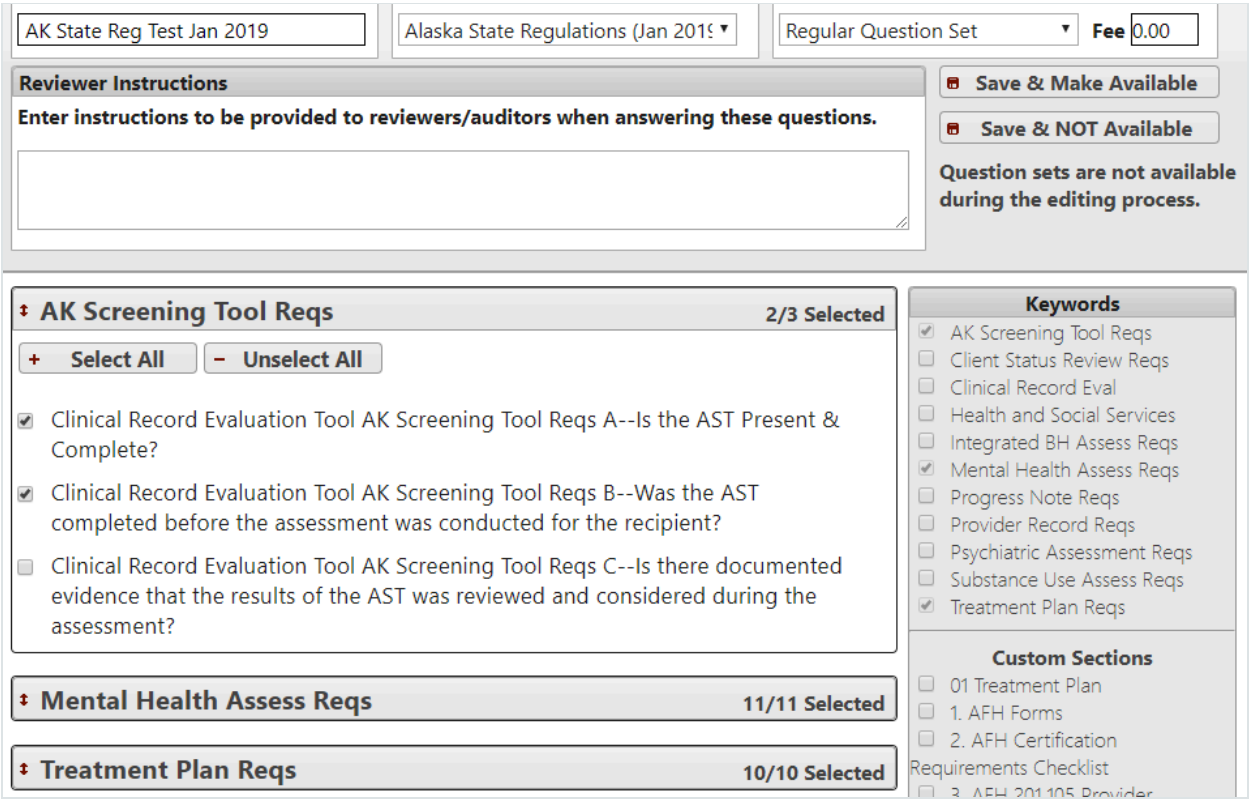
Import Question Set above the list offers ready-made question sets from the standards your organization uses; see Importing a Question Set.

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

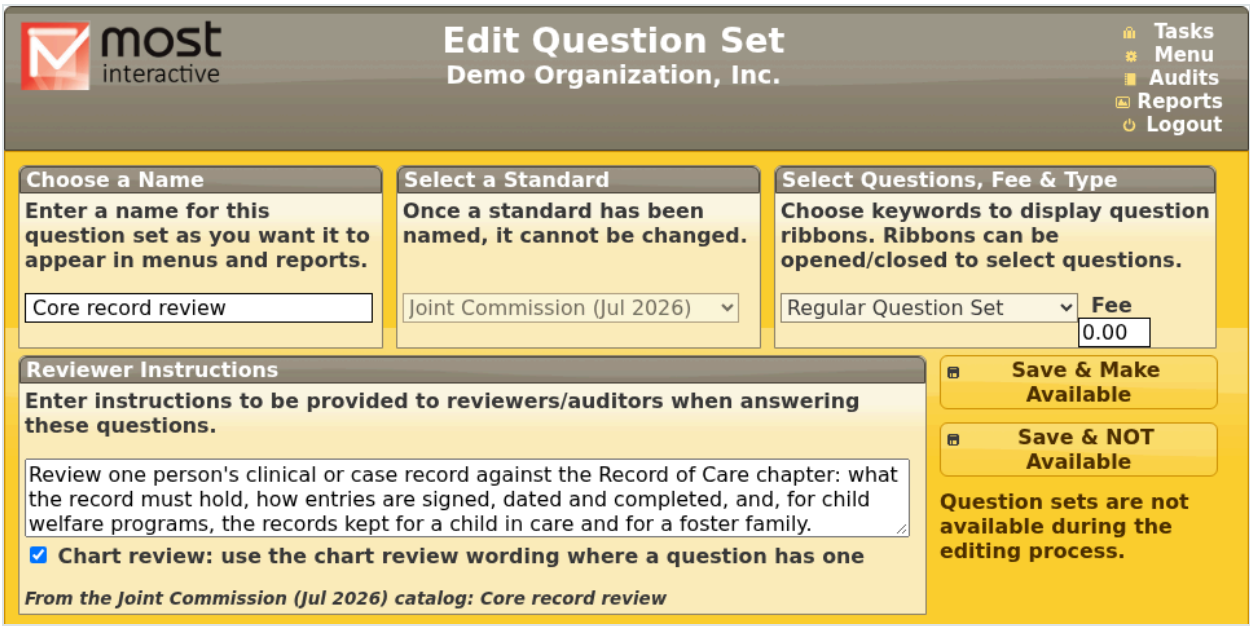
When creating a question set you will need to specify the standard from which the questions will be drawn. A new question set is built on the version of that standard in effect. If the question set will contain only custom questions then indicate **Custom Questions Only** from the drop-down. When later modifying a question set the standard on which the question set is based cannot be altered by hand; moving a question set to a newer version of its standard is described in Question Sets and Versions of a Standard. 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.

Under the instructions, **Chart review** marks the question set as one that reviews one person's record at a time; see Chart Review. A question set imported from a catalog says which one under that box, for example *From the Joint Commission (Jul 2026) catalog: Core record review*:



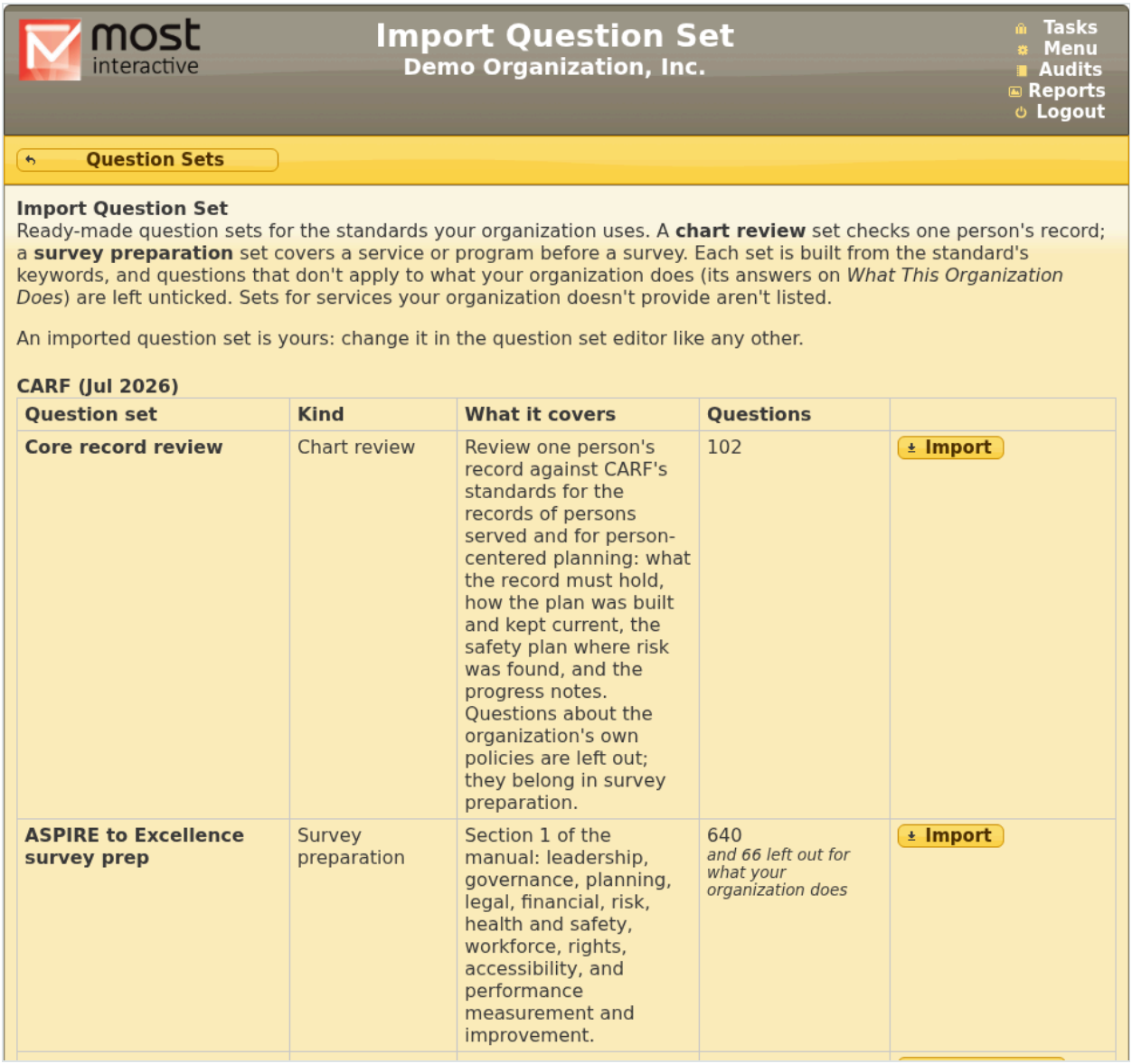
5.1.3 Importing a Question Set

Instead of building a question set from scratch, you can import a ready-made one. Each standard that comes with MOST™'s policy library has a **catalog** of question sets for its edition:

- **Chart review** sets check one person's clinical or case record: what the record must hold, and how entries are signed, dated and completed. Each catalog has a core set, **Core record review**, and for many services a set of its own. Most service sets hold only what that service adds, and are meant to be used alongside the core set. CARF's Outpatient Treatment record review is the exception: it includes the core questions and is used instead of the core set. Each set's description says which it is.

- **Survey preparation** sets cover one part of the manual, or one service or program, such as addictions, residential care or case management, to prepare for a survey.

Click **Import Question Set** on the Question Sets list. The catalogs are grouped by the standards your organization uses, each at the edition your organization works from:



most interactive

Import Question Set
Demo Organization, Inc.

Tasks
Menu
Audits
Reports
Logout

Question Sets

Import Question Set
Ready-made question sets for the standards your organization uses. A **chart review** set checks one person's record; a **survey preparation** set covers a service or program before a survey. Each set is built from the standard's keywords, and questions that don't apply to what your organization does (its answers on *What This Organization Does*) are left unticked. Sets for services your organization doesn't provide aren't listed.

An imported question set is yours: change it in the question set editor like any other.

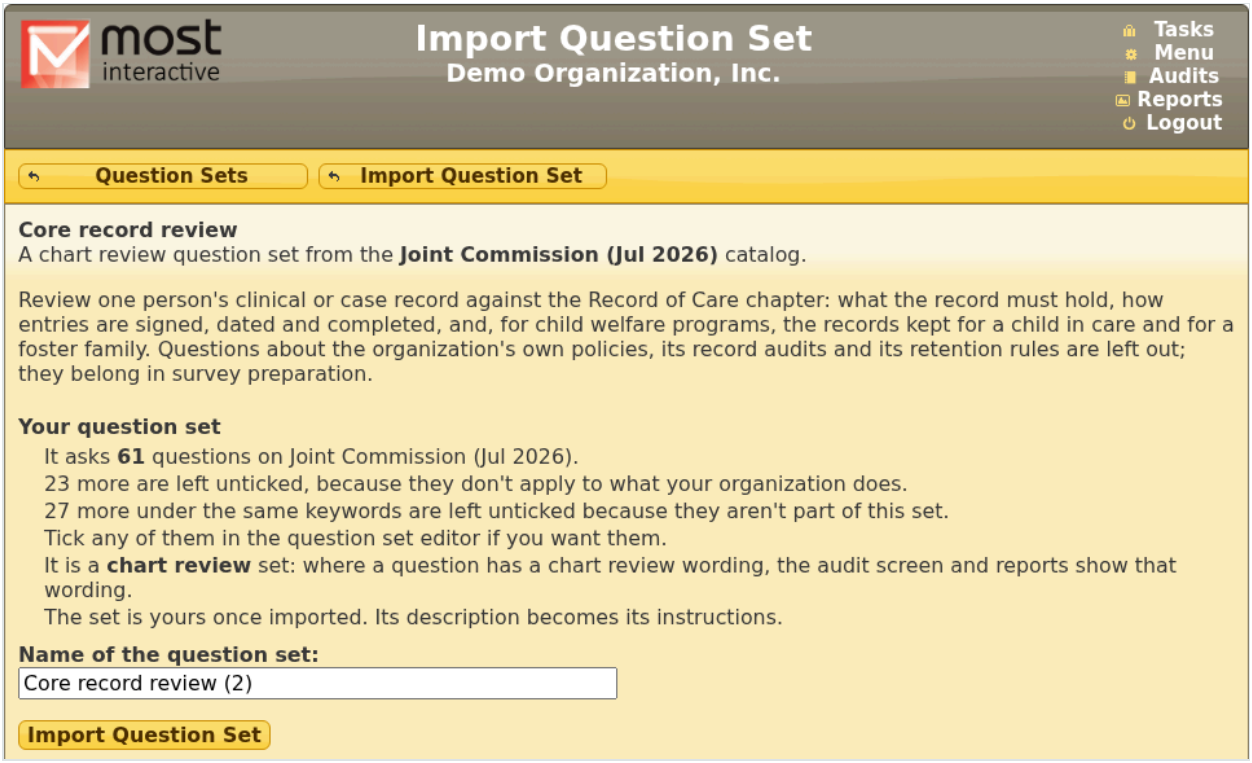
CARF (Jul 2026)

Question set	Kind	What it covers	Questions	
Core record review	Chart review	Review one person's record against CARF's standards for the records of persons served and for person-centered planning: what the record must hold, how the plan was built and kept current, the safety plan where risk was found, and the progress notes. Questions about the organization's own policies are left out; they belong in survey preparation.	102	Import
ASPIRE to Excellence survey prep	Survey preparation	Section 1 of the manual: leadership, governance, planning, legal, financial, risk, health and safety, workforce, rights, accessibility, and performance measurement and improvement.	640 *and 66 left out for what your organization does*	Import

The list fits your organization. It is built from your answers on **What This Organization Does** (see What This Organization Does):

- A set for a service your organization doesn’t provide is not listed at all.
- *Questions* shows how many questions the set would ask, and how many more are left out because they don’t apply to what your organization does.
- If some of those answers haven’t been given yet, the page says so, with a link to give them. Nothing is left out for an unanswered activity, so answer them first if you want the set to fit.

Click **Import** to see the set and name it:



The name starts as the catalog's; change it as you like, then click **Import Question Set**. The new question set is yours, exactly as if you had built it:

- Questions that don't apply to what your organization does are unticked, and so are questions under the same keywords that aren't part of the set. Tick any of them in the question set editor if you want them.
- The set's description becomes its instructions.
- It is not available for audits until you open it in the editor and save it as available.

A set can be imported more than once, under different names. The list shows each set you have imported from it, and when.

When your answers change. If your answers on What This Organization Does change after you import a set, the Import Question Set page says how the set would differ now: how many questions would now be included, and how many left out. **Replace it with a fresh import** rebuilds it from the catalog and your answers today. It stays the same question set, with the same name, instructions and availability, so reports that cover it carry on across the change, and audits already performed keep their questions. Anything you changed in the set since the import is discarded, and the page says how much before you confirm.

When the standard changes. An imported set moves to a new edition like any other question set (see Question Sets and Versions of a Standard). New questions that the catalog leaves out, or that don't apply to what your organization does, arrive unticked; what you

had chosen stays as it was. The Standards Dashboard says how many before a move or a promotion.

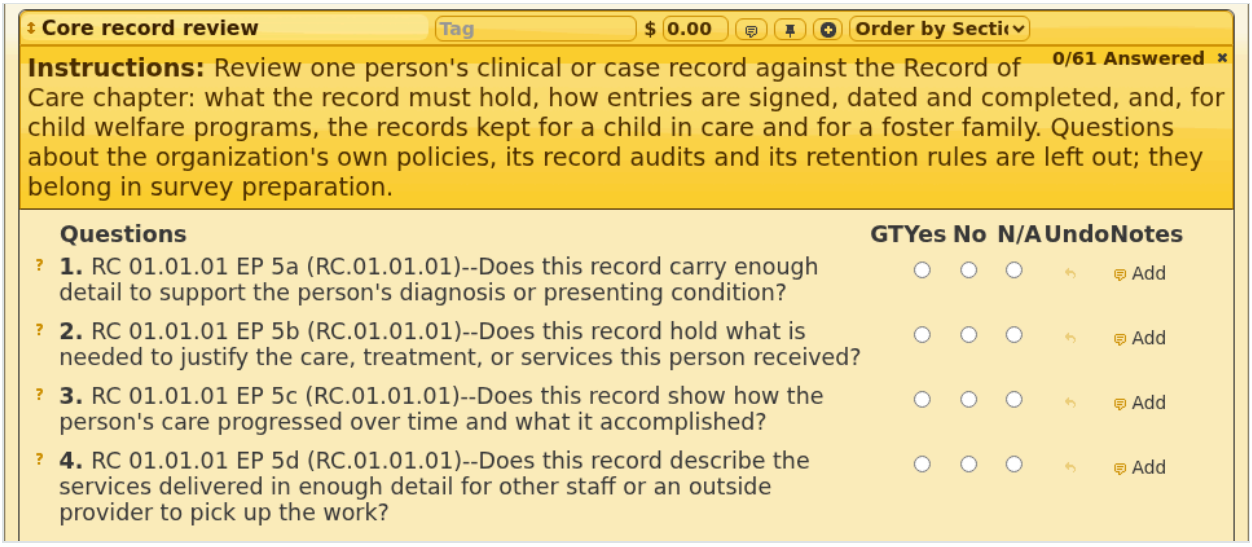
Importing needs the question admin right, as building any question set does.

5.1.4 Chart Review

A chart review reviews one person's record at a time. Many of a standard's questions are written about records in general, for example *Do only authorized staff members make entries in the clinical/case record?* For chart review, the standard can provide a second wording of the same question, written about the one record in front of the reviewer: *Were all the entries in this record made by staff authorized to make them?*

A question set marked **Chart review** (in the question set editor, or imported from a catalog as a chart review set) uses that wording:

- On the audit screens, desktop and mobile, each question that has a chart review wording shows it:



- The Audit Detail and Multi-Audit Detail reports and the printable question set show the same wording.

- Answer Totals and the Question Set Detail report show the chart review wording when every audit they cover was a chart review, and the question itself when they mix the two.

An audit keeps the setting its question set had when the audit began, so changing it later doesn't change how earlier audits read. It is the same question either way, with the same answers and reports; only the wording shown differs.

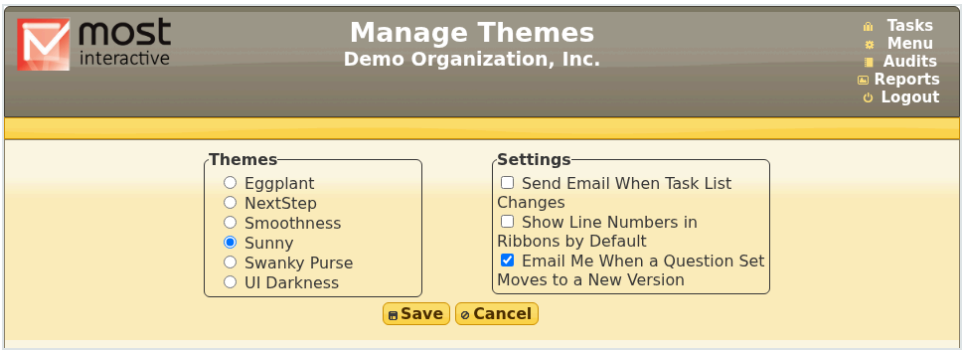
5.1.5 Question Sets and Versions of a Standard

Standards are revised. In MOST™ each revision of a standard is a new **version** (the Joint Commission calls them editions), and each version takes effect on a date. We install each new version ahead of time; nothing about your question sets or audits changes until the date it takes effect. You are surveyed to the standard in effect on your survey date, and so are your audits.

For standards that update on a schedule (the Joint Commission today), question sets work like this:

- **Question sets that follow the standard update themselves.** A question set built on the version in effect, or moved to it, *follows the standard*. The night a new version takes effect, it moves to that version by itself. It keeps its name, fee and instructions, and everything you chose: questions you added by hand stay, and questions you left out stay out. Questions the standard retires leave the set, and new questions under the set's keywords join it.

- **You are told.** When a question set moves, your organization admins and question admins see a message when they log in and are emailed a summary. The email can be turned off with **Email Me When a Question Set Moves to a New Version** in Preferences (Menu > Preferences):



- **Audits and reports are not disturbed.** An audit already started or finished keeps its questions, answers and notes. Reports cover every version of the standard without you choosing one, so a year's report stays whole across a change.

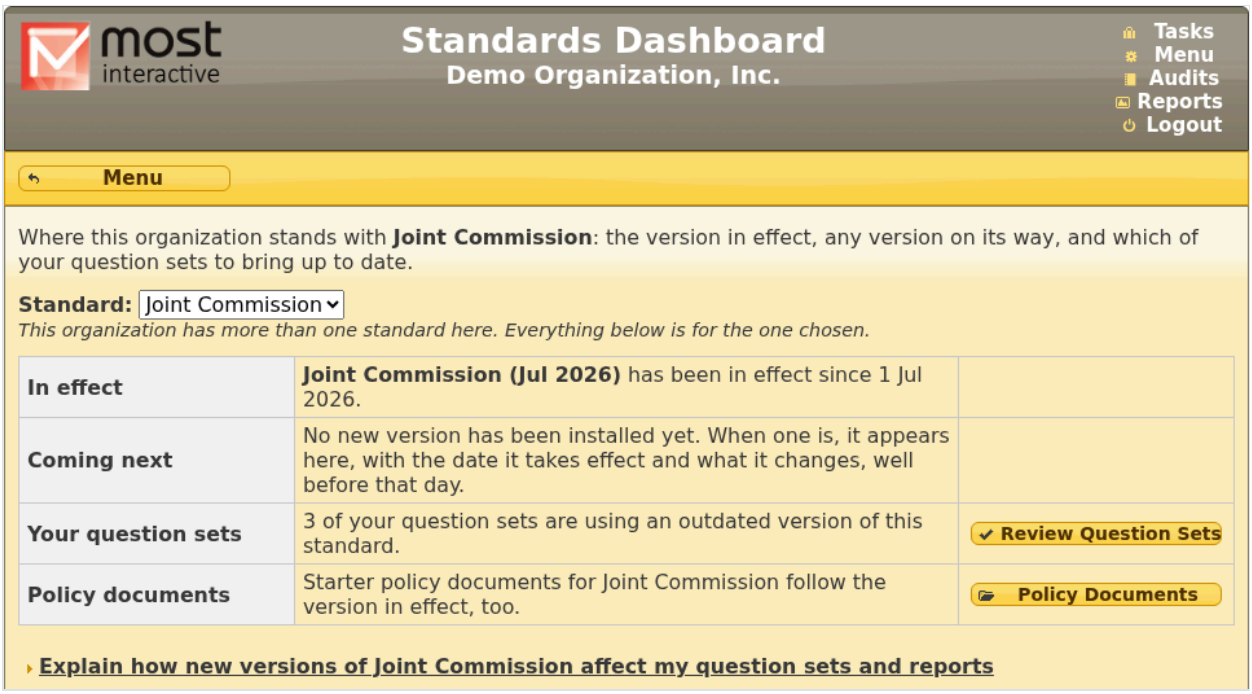
- **Older question sets stay where they are until you move them.** A question set on an older version keeps working, but it does not update. The Standards Dashboard shows each one, what moving it to the version in effect would change, and what we recommend. Once moved, it follows the standard from then on.

CARF works differently: nothing changes by date, and your organization chooses its edition. See CARF Editions.

5.1.6 The Standards Dashboard

Organization admins, question admins and policy admins in an organization that uses the Joint Commission or CARF have the Standards Dashboard. Policy admins see it but do not move question sets. To open it:

- If necessary, click on the **Menu link** (Menu)
- Click on the **Standards button** in the Questions and Tools box.



If your organization uses more than one of these standards, choose one from the **Standard** dropdown at the top; everything below it is for the one chosen. The page opens on the Joint Commission. For CARF, see CARF Editions.

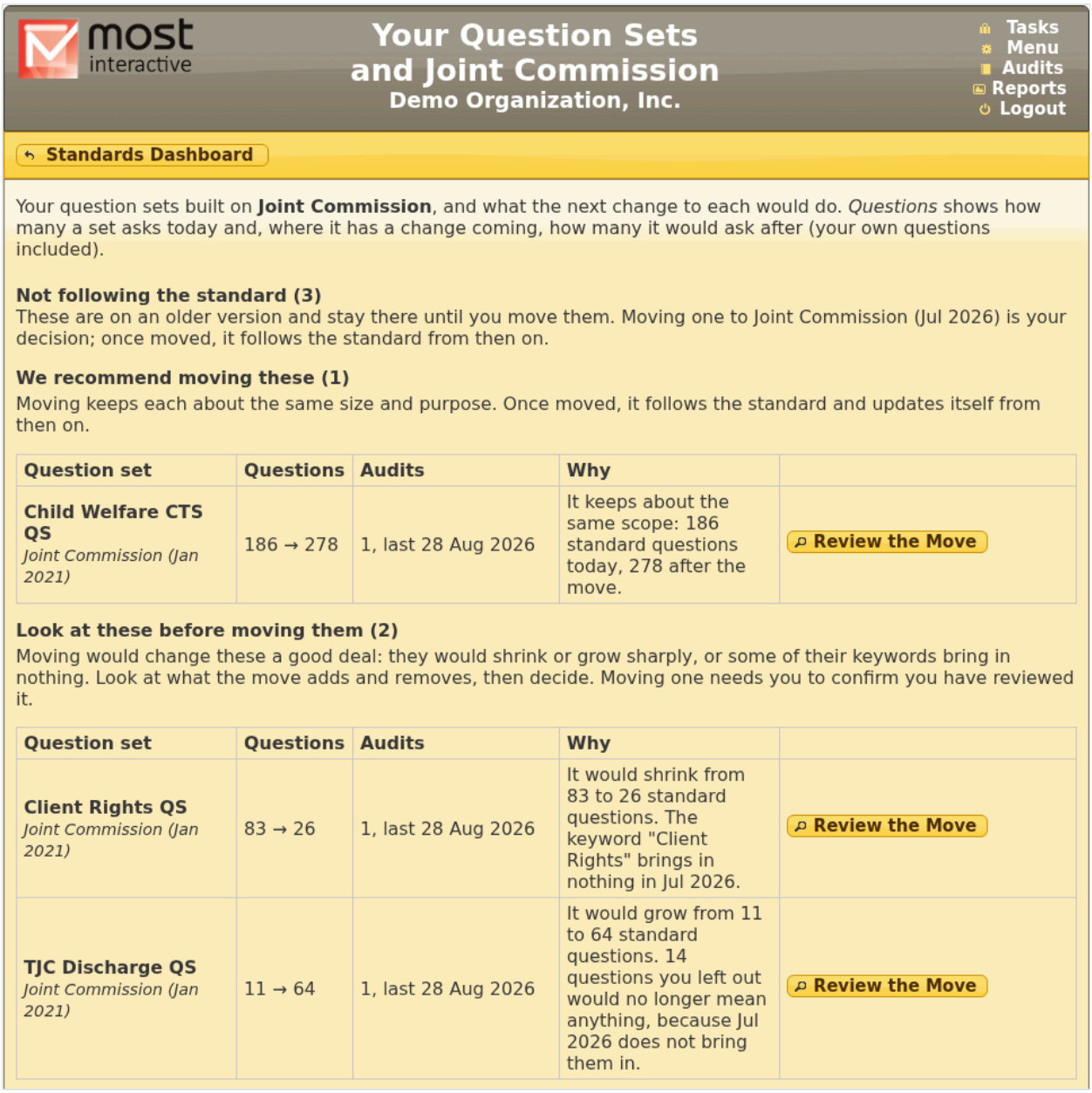
The dashboard shows where your organization stands with the standard:

- **In effect**: the version in effect and the date it took effect.
- **Coming next**: a version installed ahead of the day it takes effect, with that date, and how many of your question sets will move to it that night, and how hard each move will hit them: little, moderate or severe. **See What Changes** opens a summary of what the new version changes, written in plain words (from the Joint Commission's 1 Jan 2027 edition on): the headline changes, what to start doing and what stops, and each chapter's standards that are new, withdrawn, renumbered or changed, beside the count of questions carried over, retired and new. When a new version is installed ahead of its date, organization and question admins see a message pointing to the dashboard.

- **Your question sets**: whether any of your question sets are on an outdated version. **Review Question Sets** lists them.
- **Policy documents**: the starter policy documents follow the version in effect, too (see Policy Documents).

The link at the bottom, **Explain how new versions affect my question sets and reports**, opens the same explanation given above.

Review Question Sets lists your question sets built on the standard, and what the next change to each would do. *Questions* shows how many a set asks today and, where a change is coming, how many it would ask after (your own questions included).



Question sets that do not follow the standard are grouped by our recommendation:

- **We recommend moving these**: moving keeps each about the same size and purpose.
- **Look at these before moving them**: moving would change these a good deal. They would shrink or grow sharply, or some of their keywords would bring in nothing. Look at what the move adds and removes, then decide. Moving one of these needs you to confirm you have reviewed it.

Review the Move shows what moving a question set would add and remove, and moves it when you confirm. A move that would leave a question set with none of its standard questions is refused; build a new question set instead.

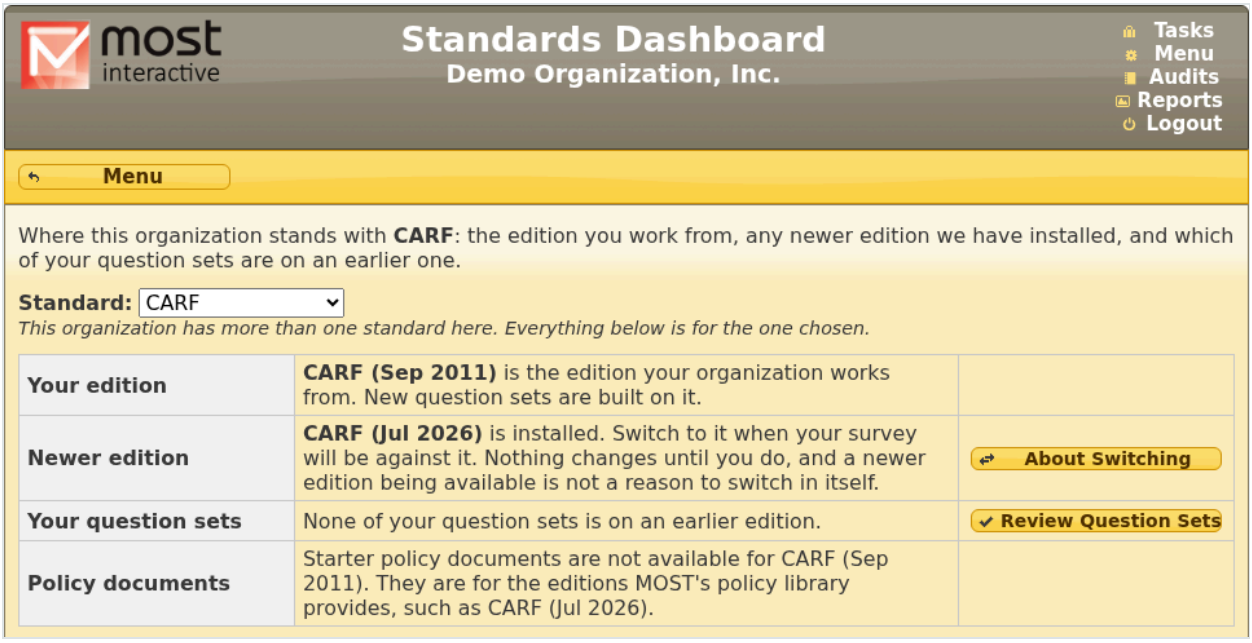
Question sets that follow the standard are listed as **Up to date**. **View History** beside a question set lists every move it has made and each question each move added and removed. (It replaces the Standard Updates screen of v7.1.)

Menu at the top left returns to the Menu.

5.1.7 CARF Editions

CARF publishes a new manual each year, and you are surveyed against the one your survey falls under. So in MOST™ your organization works from the CARF **edition** it has chosen, and nothing changes by date. When we install a newer edition, it is shown on the Standards Dashboard, and your organization switches to it when its survey calls for it, before or after the date it takes effect. A newer edition being available is not, in itself, a reason to switch.

Choose **CARF** from the **Standard** dropdown on the Standards Dashboard:



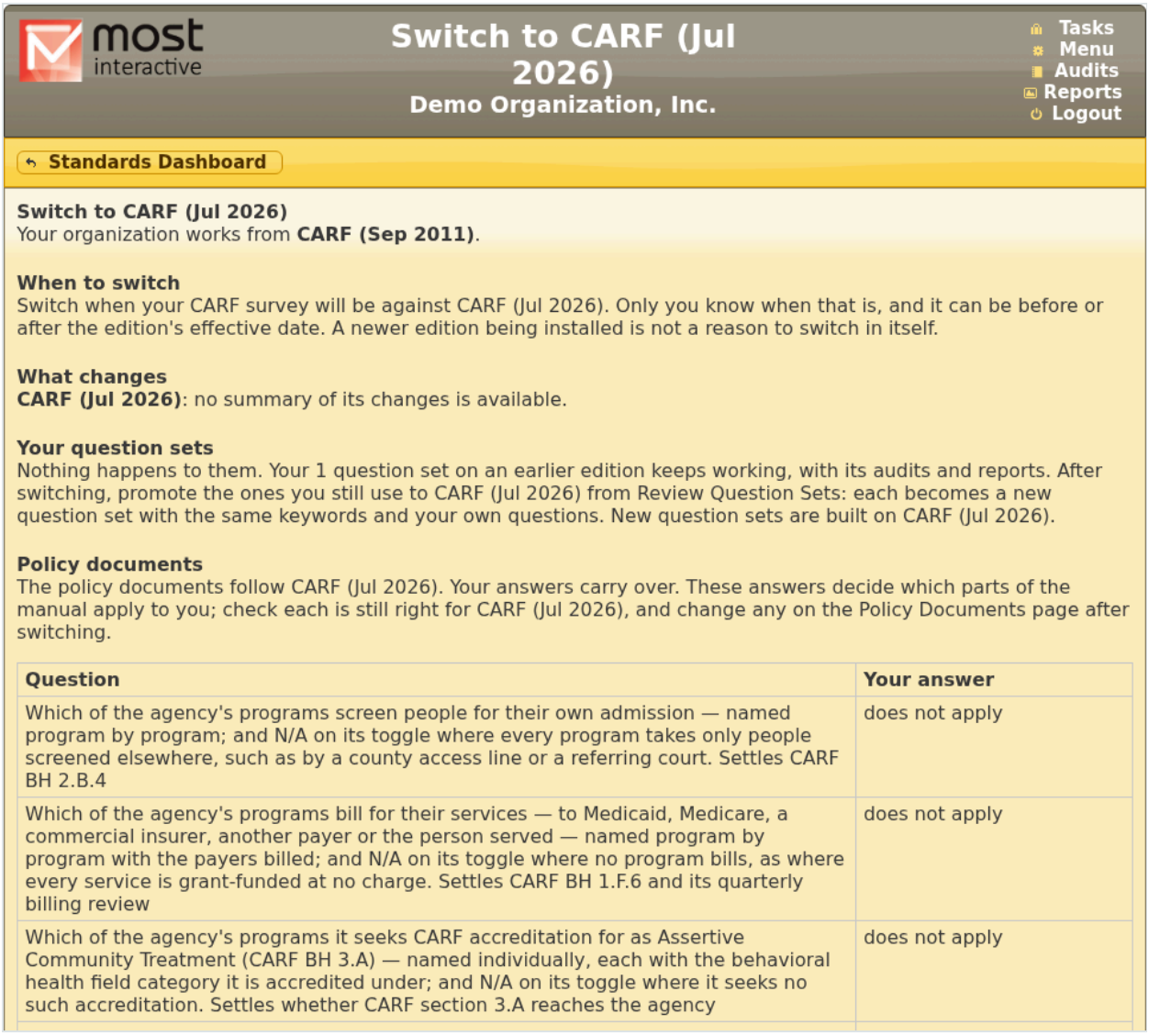
- **Your edition**: the edition your organization works from. New question sets are built on it, and the policy documents follow it.

- **Newer edition**: an edition installed after yours. **About Switching** explains what switching means and lets you switch.
- **Your question sets**: how many of your question sets are on an earlier edition than yours, or on a later one.
- **Policy documents**: starter policy documents for your edition, where MOST™'s policy library provides them.

When your organization started with CARF in MOST™, it was set to the edition of its most recent CARF audit.

5.1.7.1 Switching to a Newer Edition

Organization admins and policy admins switch. **About Switching** shows when to switch, what the newer edition changes, what happens to your question sets and policy documents, and the answers on What This Organization Does that decide which parts of the manual apply to you, so you can check each is still right. Tick the box to say you have read it and your survey will be against the new edition, then click **Switch**.



most interactive

Switch to CARF (Jul 2026)
Demo Organization, Inc.

Tasks
Menu
Audits
Reports
Logout

Standards Dashboard

Switch to CARF (Jul 2026)
Your organization works from **CARF (Sep 2011)**.

When to switch
Switch when your CARF survey will be against CARF (Jul 2026). Only you know when that is, and it can be before or after the edition's effective date. A newer edition being installed is not a reason to switch in itself.

What changes
CARF (Jul 2026): no summary of its changes is available.

Your question sets
Nothing happens to them. Your 1 question set on an earlier edition keeps working, with its audits and reports. After switching, promote the ones you still use to CARF (Jul 2026) from Review Question Sets: each becomes a new question set with the same keywords and your own questions. New question sets are built on CARF (Jul 2026).

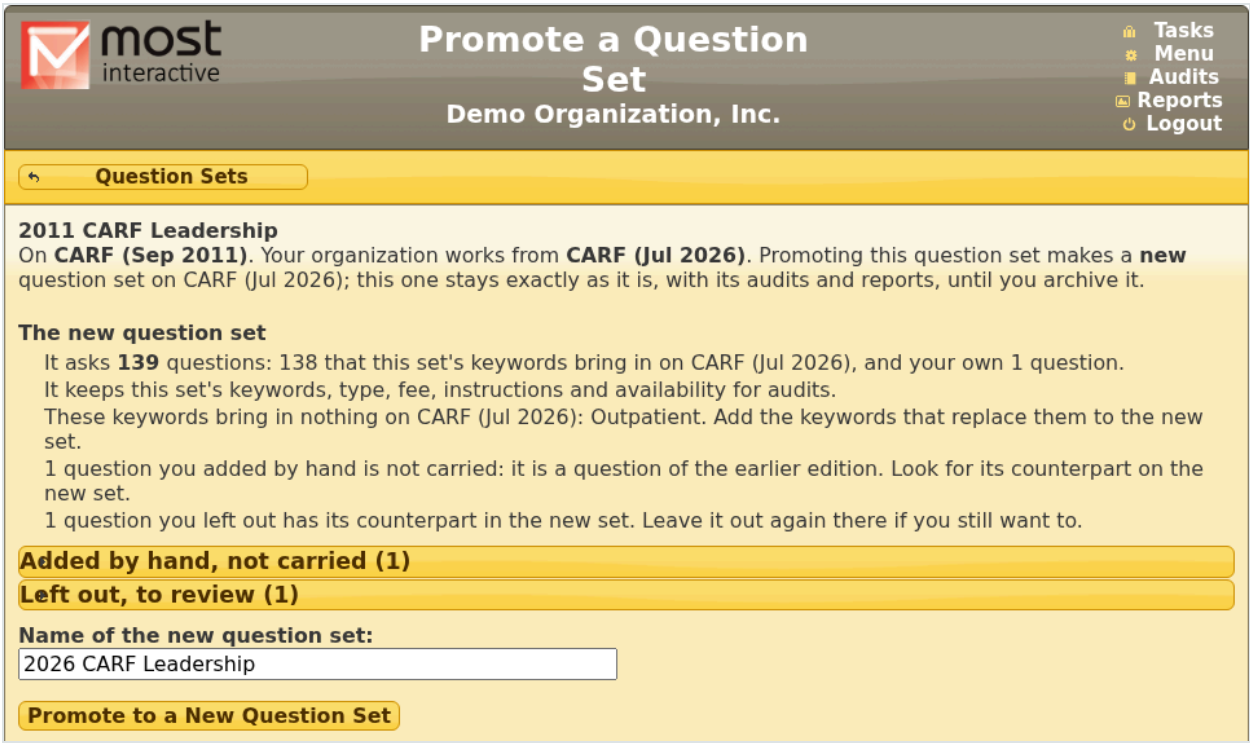
Policy documents
The policy documents follow CARF (Jul 2026). Your answers carry over. These answers decide which parts of the manual apply to you; check each is still right for CARF (Jul 2026), and change any on the Policy Documents page after switching.

Question	Your answer
Which of the agency's programs screen people for their own admission — named program by program; and N/A on its toggle where every program takes only people screened elsewhere, such as by a county access line or a referring court. Settles CARF BH 2.B.4	does not apply
Which of the agency's programs bill for their services — to Medicaid, Medicare, a commercial insurer, another payer or the person served — named program by program with the payers billed; and N/A on its toggle where no program bills, as where every service is grant-funded at no charge. Settles CARF BH 1.F.6 and its quarterly billing review	does not apply
Which of the agency's programs it seeks CARF accreditation for as Assertive Community Treatment (CARF BH 3.A) — named individually, each with the behavioral health field category it is accredited under; and N/A on its toggle where it seeks no such accreditation. Settles whether CARF section 3.A reaches the agency	does not apply

Switching changes what you build on: new question sets are built on the new edition, and the policy documents follow it. Your answers on the policy documents carry over. **Nothing happens to your question sets**: they stay on their edition and keep working, with their audits and reports. Organization, question and policy admins see a message saying the organization switched, and the switch is in the activity log.

5.1.7.2 Promoting a Question Set

Each CARF edition has its own wording, citations and help, so a question set is carried to a new edition by what defines it. **Review Question Sets** lists your CARF question sets: those on an earlier edition than yours, those on your edition, those on a later edition (built before your organization switched back, for example), and archived ones. Beside each on an earlier edition, **Promote** shows what promoting it would do:



Promoting makes a **new** question set on your edition with the same keywords, type, fee, instructions and availability, the questions those keywords bring in on your edition, and your own questions. A question set imported from a catalog is promoted as a fresh import would be: questions the new edition's catalog leaves out, or that don't apply to what your organization does, are unticked, and the page says how many. The page lists what to review on the new set:

- keywords that bring in nothing on your edition, usually because the edition renamed them;
- questions you had added by hand, which are not carried because they were questions of the earlier edition;
- questions you had left out, whose counterparts are in the new set.

The new question set's name starts as the old one with the year changed: *2025 CARF Medication Management* becomes *2026 CARF Medication Management*. Change it as you like before clicking **Promote to a New Question Set**. The old question set is left exactly as it is, with its audits and reports; archive it under Question Sets when you no longer use it. A question set whose keywords bring in nothing on your edition cannot be promoted; build a new one instead.

Promoting needs the question admin right, as building any question set does.

5.1.8 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.

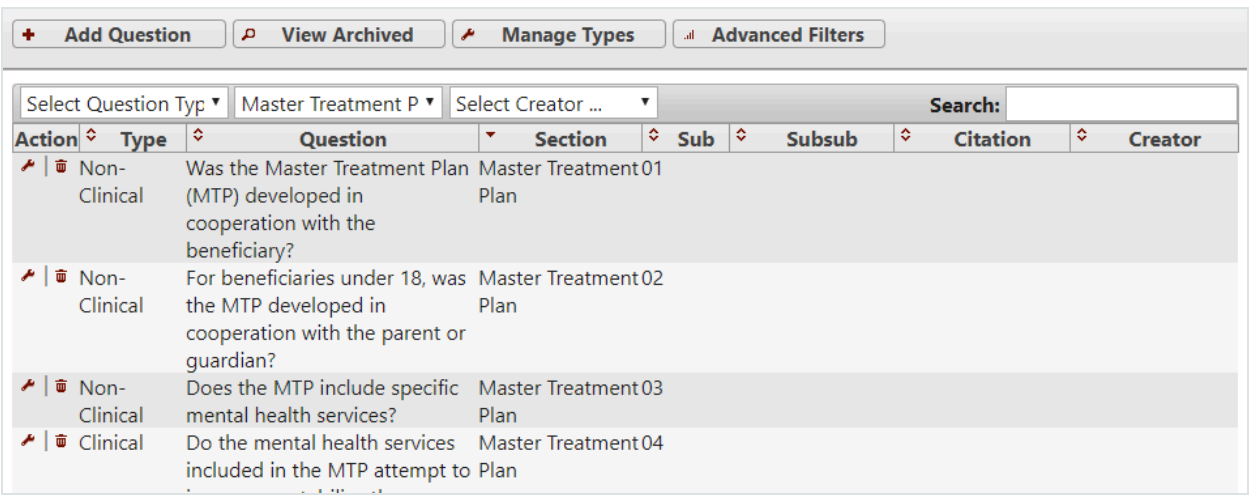
5.2 Custom Questions

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.

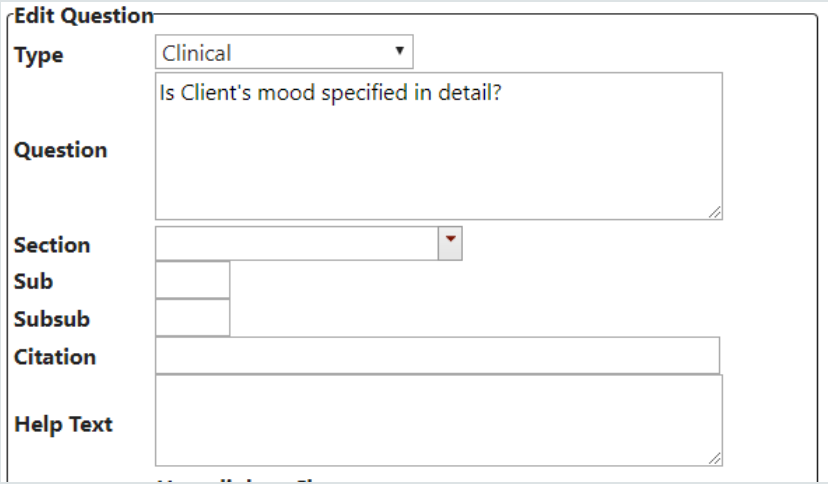
An example list:



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:



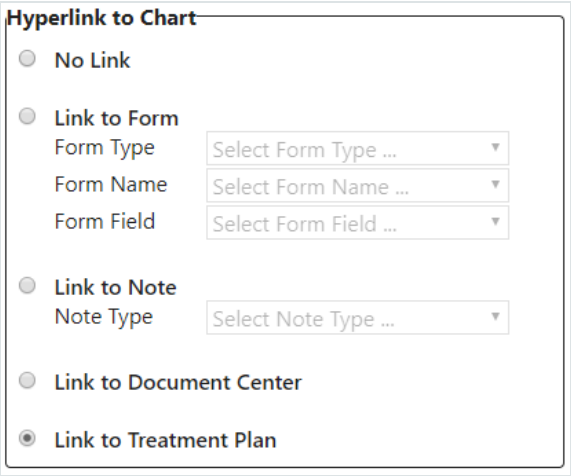
The **question** field must have a yes/no answer where “yes” indicates compliance and “no” indicates non-compliance.

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

You don't have to start from a blank page. MOST™ maintains a library of questions (questions, not the standards' legal text) written against the standards behavioral health organizations are surveyed on, and updated as those standards change. Organizations pay for access to the standards they use. The maintained question content currently covers:

- Joint Commission: Behavioral Health, and Hospital
- CARF
- COA (Private)
- State Medicaid requirements for a number of states, updated on request. Ask whether yours is covered.

Your own questions and question sets sit alongside the maintained ones: your policies, your contract requirements, the thing that went wrong last year and must never go wrong again. See Custom Questions. 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.

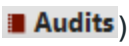
6.2 Creating an Audit

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

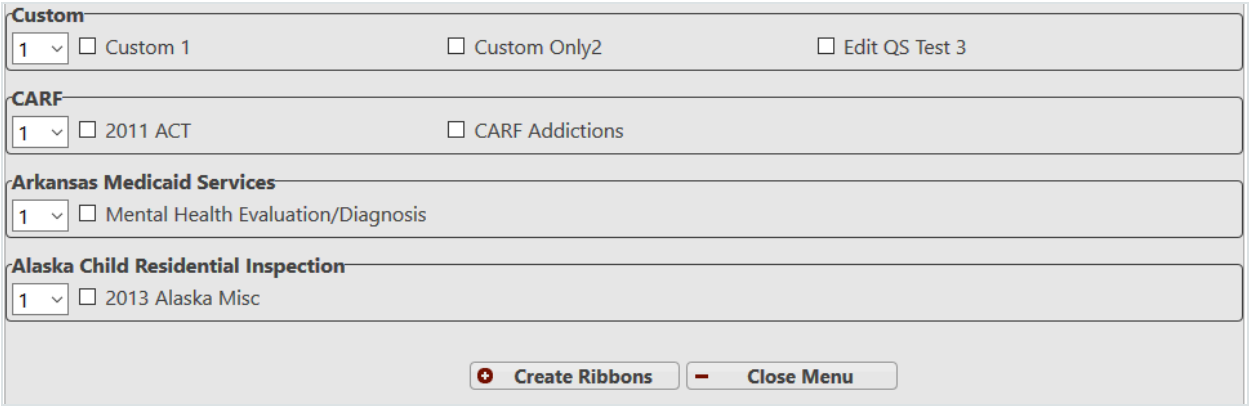
other parts of the application. It is currently only used as a possible filter in the Audit Listing Report.

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.

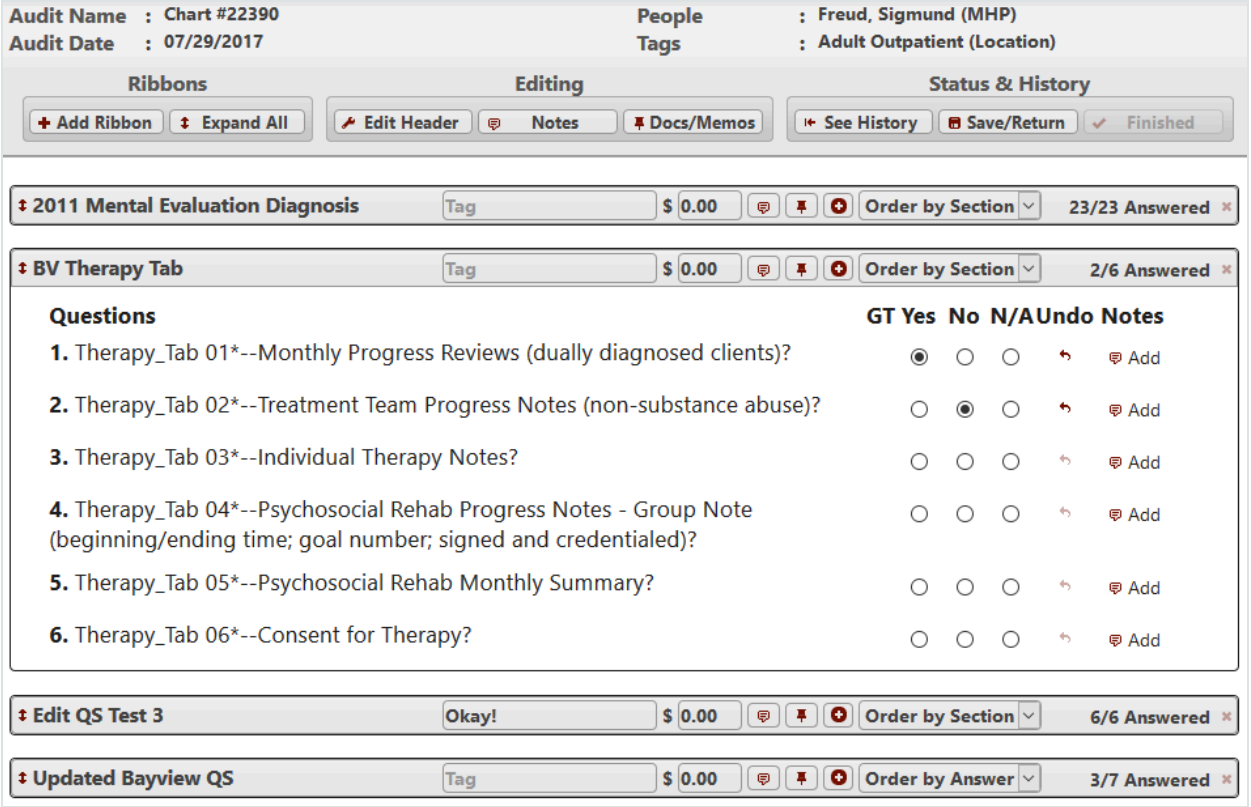
6.2.2 The Ribbons Screen

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:

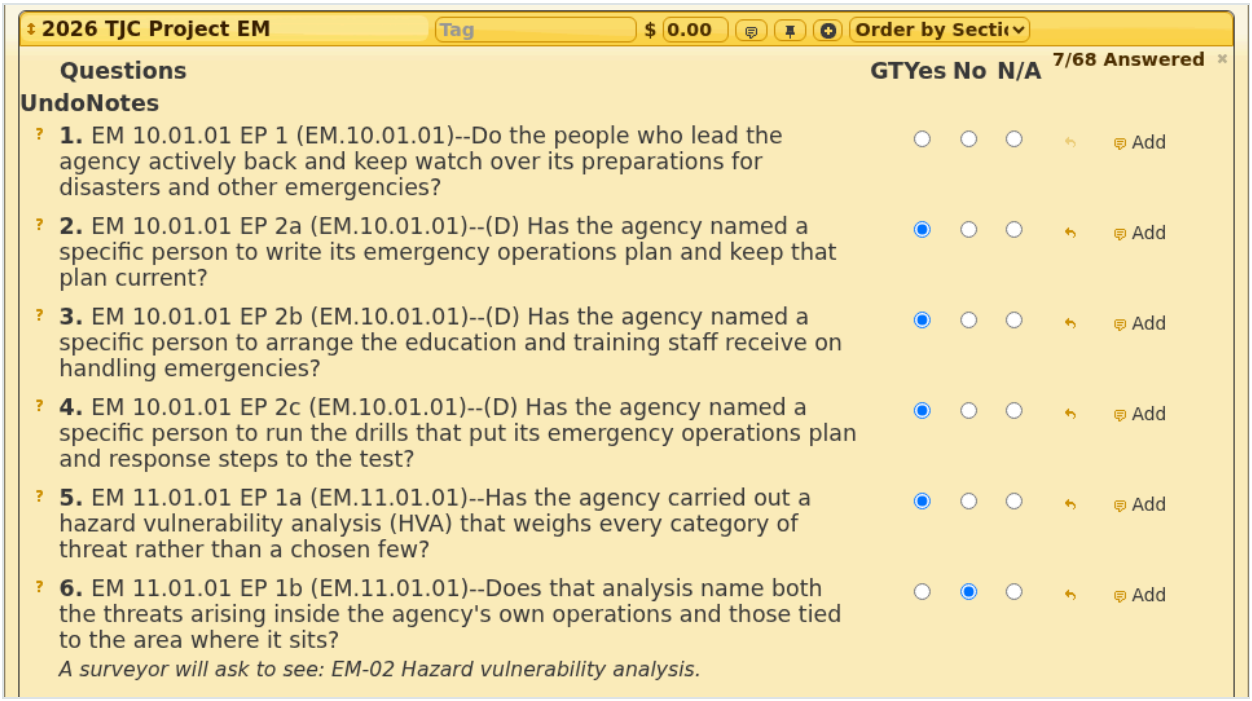
- **Add Ribbon** is used to add additional ribbons to the audit if needed
- **Expand All** opens all ribbons to reveal questions (and changes to **Collapse All**)
- **Edit Header** allows changes to audit header information
- **Notes** provides a place to enter text-based notes that pertain to the audit. 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.

Policy notes. When you answer No to a Joint Commission question, a note may appear under it. It says what the starter policy library provides for that requirement: which policy document or register covers it, or that the requirement needs nothing in writing and why.



The note is there to point you at the paperwork a surveyor will ask for. It disappears when you change the answer to Yes or N/A, or undo it, and it is not saved with the audit or printed in reports. Notes appear only for chapters your organization can see on the Policy Documents page. When the question set comes from a different edition of the standard than the policy library, the note is matched by standard rather than by element of performance, and says so. Notes appear on the mobile screens too (see MOST™ Mobile).

Chart review wording. On an audit of a chart review question set, a question that has a chart review wording shows it instead; see Chart Review.

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.

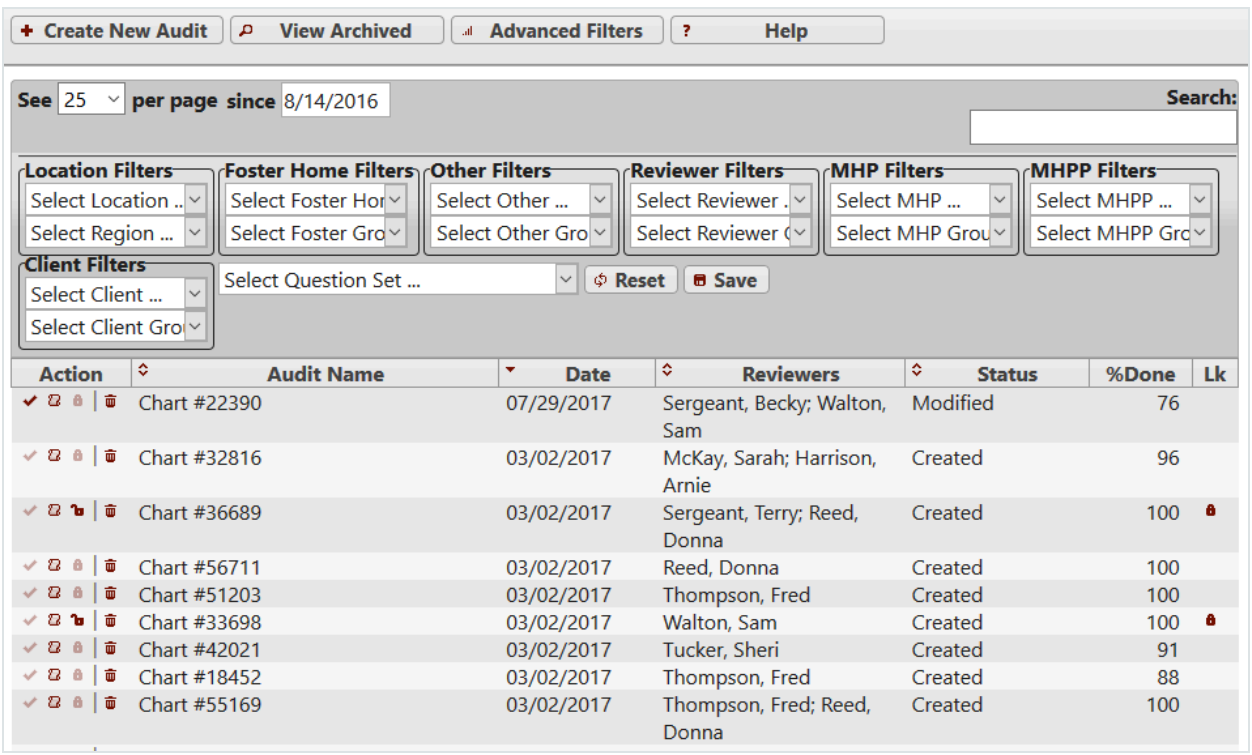
Within an open ribbon questions can be answered/unanswered and notes can be entered pertaining to each individual question. These notes can optionally appear in some reports.

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.

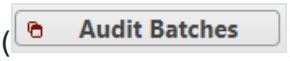
6.4 Audit Batches (NextStep-integrated)

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

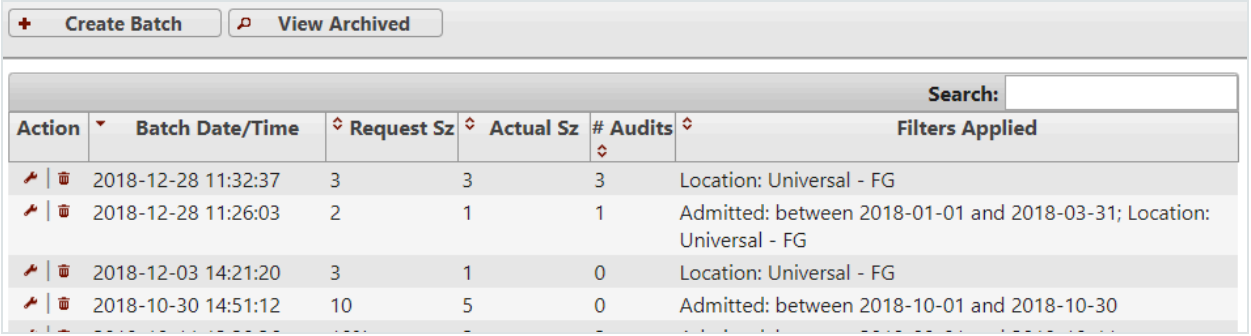
See section Listing Screens above for information on working with features common to many listing screens. To get to the batch listing screen:

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

- Click on the Audit Batches button (

)

An example of the batch listing screen:

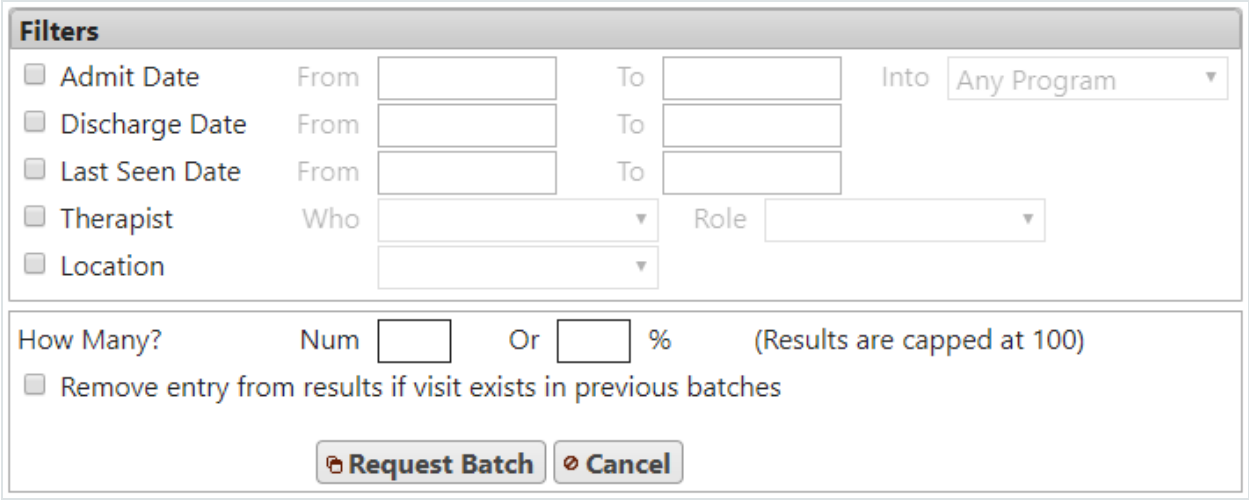


Each batch is a collection of cases from the EMR that have been randomly selected after optionally applying various filters. To work with a batch simply click the wrench icon. To create a batch click the “Create Batch” button.

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.

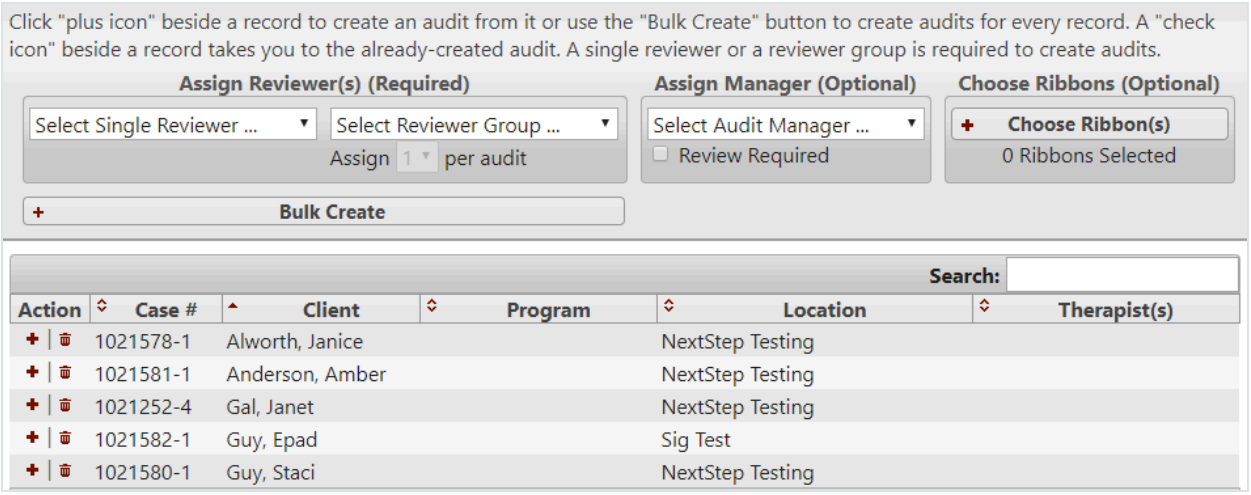
The filters are optional, but can be applied to restrict results to a particular subset of records.



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"

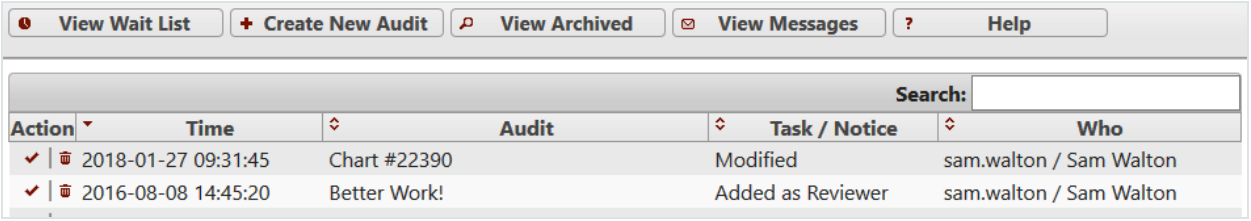
button (Approved).

- 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”

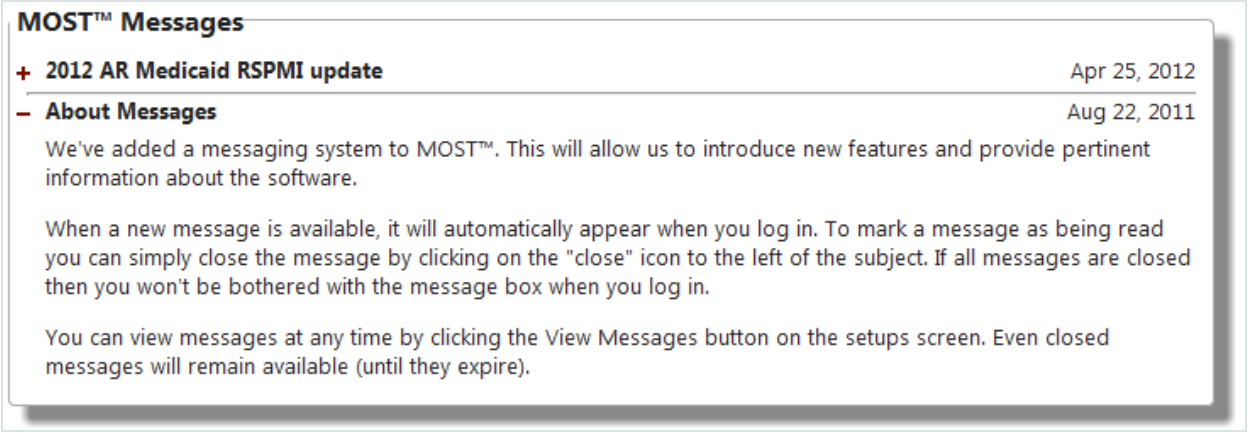
A user can have a notification email sent to them when an item is added to their task list by clicking the Menu button (Menu) and selecting “Preferences”.

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. Organization and question admins are also told here when a new version of a standard is on its way and when a question set moves to one (see Question Sets and Versions of a Standard), and policy admins when a new edition affects the policy documents. 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 produced as PDF documents, which your browser displays (or a PDF reader such as Adobe Reader, if your computer is set up to use one). From there 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.

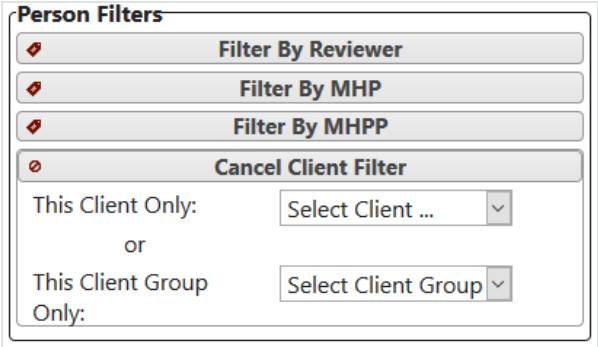
8.2 Common Themes Among the Reports

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. **Versions of a Standard**—Reports never ask you to choose a version of a standard. A report on a standard covers every version of it, and a report on a question set covers it before and after it moved to a new version, so a report that spans a change (some organizations report a whole year) stays whole. See Question Sets and Versions of a Standard.

10. **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. Set a target compliance rate, say 90%, and the report flags services falling below it as at risk for recoupment: compliance stops being a percentage and becomes a figure your finance director can act on. These figures depend on auditors entering fees faithfully; MOST™ reports what has been recorded in it and does not verify billing.

- 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.

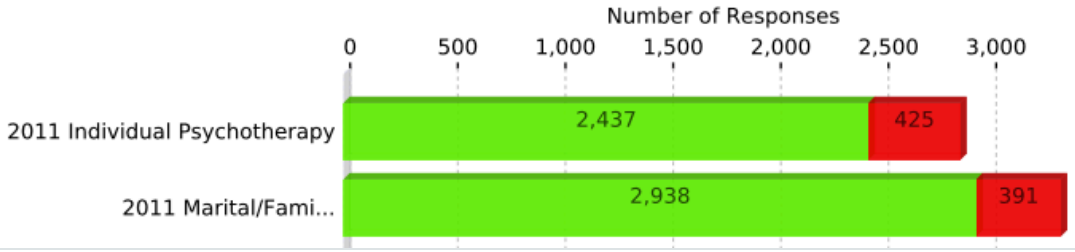
- Required Parameters: question set or question set type or standard, start date, and stop date.
- Grouping of results is dependent upon whether a single question set has been selected or not. If the report covers only a single question set then categories are based on keywords (or sections in the case 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 Policy Documents

MOST™ can give your organization a starting set of written policies and records for its accreditation standards. For the Joint Commission these follow the surveyor manual: one Word document for each chapter, and a set of Excel workbooks (registers) for the logs and records that chapter asks you to keep.

They are a starting point, written to be adapted, not adopted unread. You tell MOST™ what your organization does and fill in the values the documents ask for; anything MOST™ does not yet know about your organization appears in a document as **[[NAME]]**, so a document is useful before it is finished and shows you what is still to fill in. Every document ends with the standards that need nothing in writing, and why, so a surveyor's question about a missing policy has an answer.

Policy documents are available to organizations whose standards have a starter library: the Joint Commission, and CARF Behavioral Health (from its 2026 edition). For those organizations the Menu has a Policy Documents box. For CARF, the documents follow the edition your organization works from (see CARF Editions), and an edition MOST™'s library does not provide has none. To open the Policy Documents page:

- If necessary, click on the **Menu link** (Menu)
- Click on the **Policy Docs button** in the Policy Documents box.

9.1 Who Can Do What

Anyone in the organization can see the answers and download documents. Changing an answer or the chosen chapters needs the **policy admin** right (*Give user rights to set policy document values and choose policy chapters*), which is given in a user's permissions from the Users screen (see Creating and Managing Accounts). Organization admins have it already. In the CompliaTrac permissions model there is no organization admin, so someone must be given policy admin or nobody can fill the documents in. When policy documents arrived in v7.0, users who were question admins were given policy admin.

Switching your organization to a newer CARF edition needs the policy admin right too (organization admins have it), because the policy documents follow it. See CARF Editions.

A policy document carries no audit data and no PHI.

9.2 The Policy Documents Page

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Policy Documents

Demo Organization, Inc.

Tasks
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Menu

? Help

Starter policy documents for **Joint Commission**: a written policy for each standard, the records and registers that go with it, and the wording a surveyor expects to see. They are a starting point, written to be adapted — not adopted unread.

You say who you are and which chapters apply. Anything left unanswered appears in the document as `[[NAME]]`, so a document is useful before it is finished.

Standard: Joint Commission

This organization has more than one standard here. Everything below is for the one chosen.

What this organization does	**56 of 56** answered. These decide which chapters and standards are yours at all, so they are worth doing first.	Update Answers
Most-used values	**23 of 25** of the values the library asks for most answered, 29 answered in all.	Update Answers
Selected Chapters	**14 of 16** chosen — 2026-07-01 edition.	Choose chapters

Chapters you have chosen

Chapter	Name	Values answered	What it holds	
APR	Accreditation Participation Requirements	16 of 44	7 standards 4 register(s)	Answers Document Registers
CTS	Care, Treatment, and Services	25 of 511	133 standards 36 register(s)	Answers Document Registers
EC	Environment of Care	21 of 142	17 standards 12 register(s)	Answers Document Registers
EM	Emergency Management	24 of 179	13 standards 10 register(s)	Answers Document Registers
HRM	Human Resources Management	22 of 92	13 standards 14 register(s)	Answers Document Registers
IC	Infection Prevention and Control	14 of 34	2 standards 3 register(s)	Answers Document Registers
IM	Information Management	24 of 97	8 standards 12 register(s)	Answers Document Registers
LD	Leadership	25 of 346	34 standards 34 register(s)	Answers Document Registers
MM	Medication Management	13 of 32	21 standards 20 register(s)	Answers Document Registers
NPSG	National Patient Safety Goals	23 of 74	5 standards 5 register(s)	Answers Document Registers
PI	Performance Improvement	19 of 58	4 standards 6 register(s)	Answers Document Registers
RC	Record of Care, Treatment, and Services	21 of 96	10 standards 11 register(s)	Answers Document Registers
RI	Rights and Responsibilities of the Individual	23 of 139	19 standards 11 register(s)	Answers Document Registers
WT	Waived Testing	17 of 43	5 standards 6 register(s)	Answers Document Registers

Everything still to answer across the chapters you have chosen

If your organization has policy documents for more than one standard, choose one from the **Standard** dropdown at the top; everything below it is for the one chosen. The page opens on the Joint Commission.

The page shows how far your organization has got:

- **What this organization does**: the questions that decide which chapters and standards are yours at all. Answer these first. Nothing can be built until every one has been decided.
- **Most-used values**: the names, roles and time periods the library uses most often. Answer them once and they fill in everywhere.
- **Selected chapters**: the chapters your organization adopts, and the edition of the standard they come from. Chapters every accredited organization owes are always included.

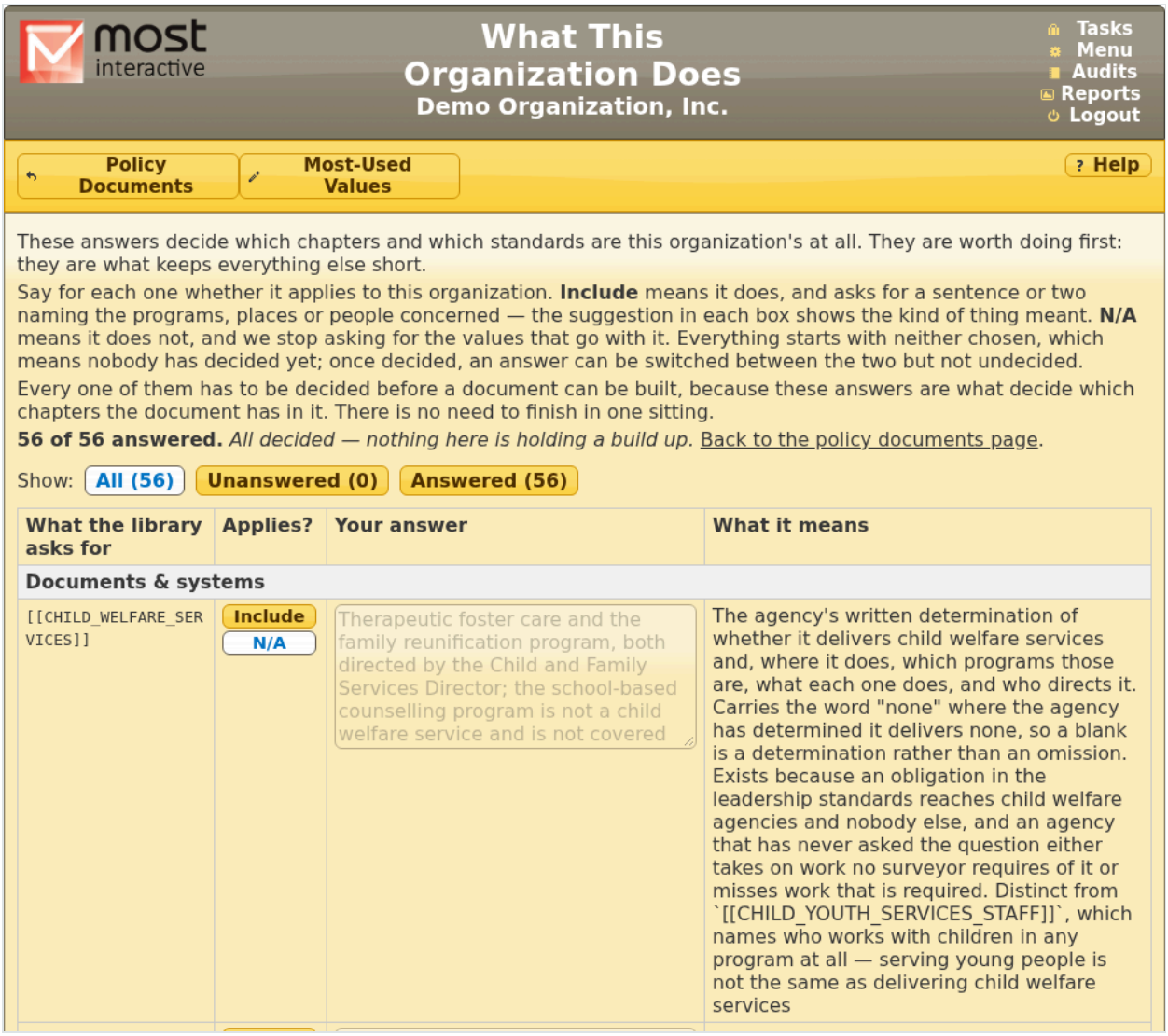
Each chosen chapter has three buttons: **Answers**, to fill in the values that chapter uses; **Document**, to download the chapter as a Word document with your values filled in; and **Registers**, to download its workbooks. **Everything still to answer** lists every value the chosen chapters still need, in one place.

9.3 Saving as You Go

The policy documents screens have no Save button. A choice is saved when you click it, and typing is saved a moment after you stop or when you leave the box. The note in the bottom corner of the screen says *Saving*, then *All changes saved*. If it says *Not saved*, click **Retry**; if that fails, your session may have expired, so reload the page before carrying on. The page asks before you leave it only while something is still unsaved.

Every value screen can show **All**, **Unanswered** or **Answered**, so you can work through what is left.

9.4 What This Organization Does



These answers decide which chapters and which standards are your organization’s at all, so they are worth doing first. For each question choose:

- **Include**: it applies, and the box holds your answer: a sentence or two naming the programs, places or people concerned. The suggestion in each box shows the kind of thing meant.
- **N/A**: it does not apply here, and MOST™ stops asking for the values that go with it.

Every question starts with neither chosen, which means nobody has decided yet. Once you have chosen, you can switch between the two but not go back to neither, so an answer that has been decided stays decided. Typing an answer chooses Include for you. Choosing N/A clears the answer, and asks first if something is written there.

Every question has to be decided before a document can be built, because these answers decide which chapters a document has in it. There is no need to finish in one sitting.

9.5 Most-Used Values

The values you give are your organization’s, not one document’s: one answer to the chief executive’s title appears in every document that mentions it. Changing one changes it everywhere the next time a document is downloaded. Nothing here has to be finished before you can build a document.

Roles are usually titles. Answer a role such as Program Director or Clinical Director with the title your organization gives it, not a person’s name. One answer is used everywhere the role is mentioned, so a title covers every program and does not go out of date when someone leaves. A few ask for a named party because the requirement does (an outside firm or contractor, such as legal counsel, or the holder of a licence or certificate, such as the pharmacist-in-charge), and the *What it means* column says so where one does.

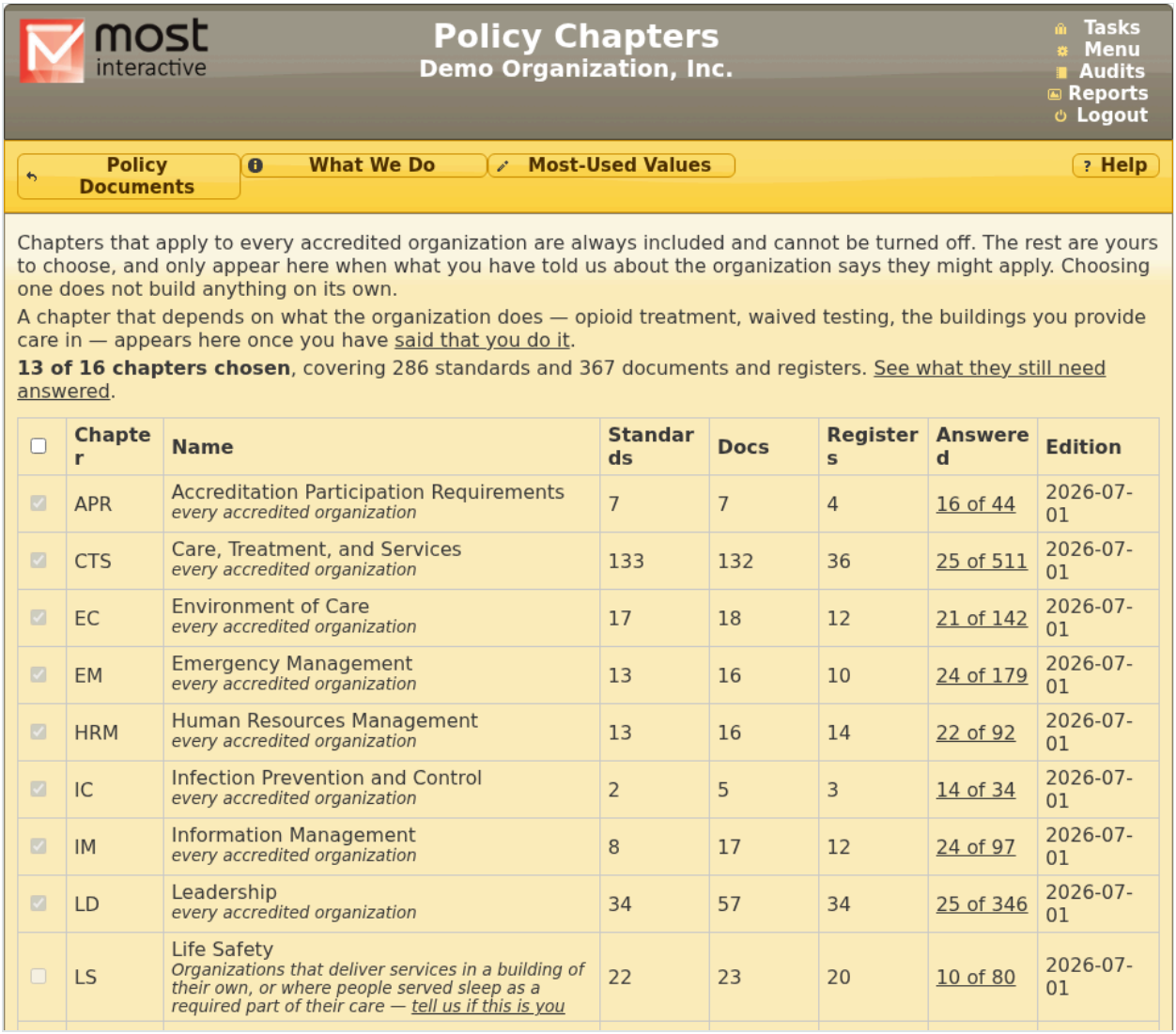
Roles
Most of these ask for the title your organization uses, not a person’s name. One answer is used everywhere the role is mentioned, so a title covers every program and survives staff changes. A few need a named firm, contractor or licence holder instead; *What it means* says so where one does.

`[[PROGRAM_DIRECTOR]]`	Program Director	Title the agency gives the leader who directs a program or service — one title covering every program, because each program's policies use it
`[[CLINICAL_DIRECTOR]]`	Clinical Director	Title of the senior clinical leader
`[[MEDICAL_DIRECTOR]]`	Medical Director	Title of the physician responsible for clinical oversight
`[[CEO]]`	CEO	Title of the agency's chief executive — executive director, CEO, or president

The **Answers** button beside a chapter shows the values that chapter asks for. They are shared with every other chapter that asks for the same thing, so answering one there answers it everywhere.

9.6 Choosing Chapters

Choose chapters on the Policy Documents page lists the chapters of the standard.



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Policy Chapters
Demo Organization, Inc.

Tasks
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Logout

Policy Documents | What We Do | Most-Used Values | ? Help

Chapters that apply to every accredited organization are always included and cannot be turned off. The rest are yours to choose, and only appear here when what you have told us about the organization says they might apply. Choosing one does not build anything on its own.

A chapter that depends on what the organization does — opioid treatment, waived testing, the buildings you provide care in — appears here once you have said that you do it.

13 of 16 chapters chosen, covering 286 standards and 367 documents and registers. See what they still need answered.

	Chapter	Name	Standards	Docs	Registers	Answered	Edition
☑	APR	Accreditation Participation Requirements *every accredited organization*	7	7	4	16 of 44	2026-07-01
☑	CTS	Care, Treatment, and Services *every accredited organization*	133	132	36	25 of 511	2026-07-01
☑	EC	Environment of Care *every accredited organization*	17	18	12	21 of 142	2026-07-01
☑	EM	Emergency Management *every accredited organization*	13	16	10	24 of 179	2026-07-01
☑	HRM	Human Resources Management *every accredited organization*	13	16	14	22 of 92	2026-07-01
☑	IC	Infection Prevention and Control *every accredited organization*	2	5	3	14 of 34	2026-07-01
☑	IM	Information Management *every accredited organization*	8	17	12	24 of 97	2026-07-01
☑	LD	Leadership *every accredited organization*	34	57	34	25 of 346	2026-07-01
☐	LS	Life Safety *Organizations that deliver services in a building of their own, or where people served sleep as a required part of their care — tell us if this is you*	22	23	20	10 of 80	2026-07-01

Chapters that apply to every accredited organization are always included and cannot be turned off. The rest are yours to choose, and only appear when what you have told MOST™ about the organization says they might apply: a chapter that depends on what the organization does (opioid treatment, waived testing, the buildings you provide care in) appears once you have said that you do it. Choosing a chapter does not build anything on its own.

9.7 Downloading Documents and Registers

Document downloads the chapter as a Word document. A document is built from your values as they stand when you press the button, so download it again after you change an answer.

Registers opens the list of workbooks the chapter asks you to keep. Download them one at a time, or all together as a zip file with **Download all**.

Each workbook is a starting point: the dropdowns, dates and status columns are set up, and the rows are yours to fill in. What you type into a workbook stays in the workbook; it does not come back into MOST™.

9.8 When a New Edition Arrives

For CARF, the policy documents follow the edition your organization has switched to, and change only when it switches (see CARF Editions). For the Joint Commission, the policy documents follow the edition of the standard in effect. When a new edition is installed ahead of the day it takes effect, policy admins see a message, and the Policy Documents page shows what the edition means for your documents: documents added, retired or changed, values to revisit, and workbooks to rebuild, with your chosen chapters first. Until the date it takes effect, your documents are built from the edition in effect. The summary is shown from when the edition is installed until 90 days after it takes effect, and stays available from a link after that.

10 Glossary

Authenticator App: An app on a phone, such as Google Authenticator or the iPhone's Passwords app, that shows a new 6-digit number every 30 seconds, used for two-step sign-in. See Two-Step Sign-In.

Catalog: The ready-made question sets that come with an edition of a standard, offered on the Import Question Set page. See Importing a Question Set.

Chart Review: A review of one person's record. A question set marked for chart review shows each question's chart review wording, where the standard provides one. See Chart Review.

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

Passkey: A way to sign in kept on a computer or phone, confirmed with the PIN, face or fingerprint that unlocks it. See Two-Step Sign-In.

PDF: *(Portable Document Format)* is the file format in which reports within this software are produced. Browsers display PDF documents themselves; a separate PDF reader, such as Adobe Reader, is optional.

Policy Admin: A user with the right to fill in the policy documents' values and choose their chapters. Organization admins have it already. See Who Can Do What.

Policy Document: A starter written policy for one chapter of a standard, downloaded as a Word document with the organization's values filled in. See Policy Documents.

Policy Note: The line that appears under a No answer on a Joint Commission question, naming the policy document or register that covers the requirement. It is not saved with the audit.

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. A question set built on a standard is built on one version of it; one that *follows the standard* moves to each new version when it takes effect.

Recovery Code: One of ten codes, each good for one sign-in in place of your phone or computer, given when two-step sign-in is set up. See Two-Step Sign-In.

Register: An Excel workbook for a log or record a chapter of the standard asks the organization to keep, set up and ready to fill in. See Downloading Documents and Registers.

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.

Security Key: A small device, such as a YubiKey, plugged into a computer and touched to confirm a sign-in. See Two-Step Sign-In.

Standards Dashboard: The screen (Menu > Standards) where organization, question and policy admins see which version of their standard is in effect, what is coming, and which question sets to move; for CARF, the edition the organization works from and which question sets to promote. See The Standards Dashboard.

Two-Step Sign-In: Signing in with your password and one more thing: a passkey, a security key or an authenticator app. See Two-Step Sign-In.

Value: Something a policy document asks the organization for, such as the title of its clinical director, shown in the library as a name in double brackets, like **[[CLINICAL_DIRECTOR]]**. A value not yet answered appears in the document that way.

Version of a Standard: One revision of a standard, which takes effect on a date. The Joint Commission and CARF call their versions editions. An organization using CARF works from the edition it chooses (see CARF Editions). See Question Sets and Versions of a Standard.

11 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?

   MOST™ is hosted on Amazon Web Services (AWS) under a business associate agreement. Data is encrypted in transit and at rest, and backed up nightly. All accounts are password protected, with two-step sign-in for administrators and anyone else who chooses it, and an account is locked after repeated wrong passwords. PIL maintains HIPAA compliance and will sign a business associate agreement (BAA) at your request. Reports can omit audit names and any field designated as possibly containing PHI, audits can be locked, and the activity log is tamper-evident.

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.

8. A new version of our standard took effect. Do our reports have to choose one?

   No. Reports cover every version of a standard, so a report that spans the change stays whole. See Question Sets and Versions of a Standard.

9. Why does a policy document show a name in double brackets, like [[CEO]]?

   That value has not been answered yet. Answer it on the Policy Documents screens and download the document again. See Most-Used Values.

10. I lost my phone (or my security key). How do I sign in?

    Use one of your recovery codes: after your password, choose **Use a recovery code**. MOST™ then takes you to set up your new phone or this computer. If you have no recovery codes left, ask an administrator to reset your two-step sign-in. See Two-Step Sign-In.

12 Appendix

12.1 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

12.2 Supported Browsers

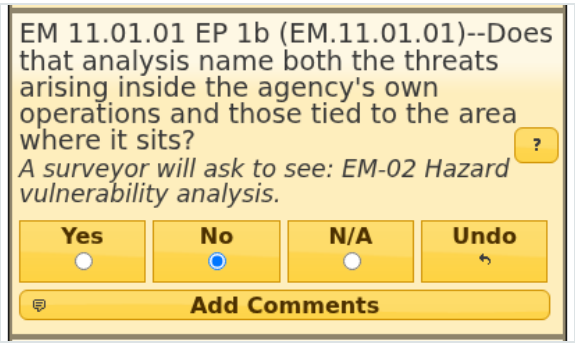
Supported browsers are current versions of Chrome, Edge, Firefox, and Safari. So, there is no software to install and no need to deal with updates because they happen on the server automatically. The URL for the application is provided to your organization during the setup process. Once your organization 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 over an encrypted (HTTPS) connection. It is hosted on Amazon Web Services under a business associate agreement, its data is encrypted in transit and at rest, and it is backed up nightly. Software and operating system updates are installed regularly. MOST™ is not a clinical record system.

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.

12.3 MOST™ Mobile

MOST™ Mobile allows users to create and complete audits from their small-screen device, so a walkthrough or a building round is recorded where it happens. 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. Policy notes appear under No answers there too (see Answering Questions):



12.4 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
- Ongoing preparedness between surveys, rather than a scramble in the final weeks
- Tracking over time: a trend, not a snapshot taken the week before a survey
- 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.