



Help at Home.®

Care to Live Your Life.

Q2 2026 Clinical Recharge

May 2026



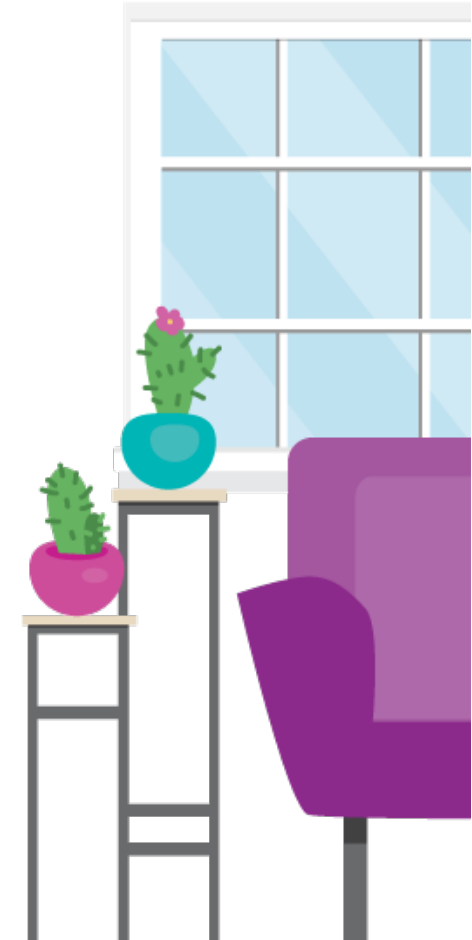
Agenda & Welcome

- Scribe Support for Admission Documentation
- Clinical Chart Audits
- Authorizations
- Home Observations
- EMR Update
- General Housekeeping
- Clinician of the Quarter

Welcome to.....

- Hannah Renback – Northern Region RNCM
- Corrin Roman – East Region RNCM
- Mackenzie Rees – Southeast Region RNCM
- Katelynn Jordan – Southwest Region RNCM
- Amanda Crumley – Northern Region RNCM
- Ashley Delk – East Region RNCM
- Katherine Byers – East Region RNCM

Congratulations to Kelli Reed
on her upcoming retirement at the
end of the month 🎉



Scribe Support For Admission Documentation

- Angie Wilt hosted an admission training call on 4/28 specifically for training on use of resources
 - Detailed instructions about the admission process can be found in the meeting's Teams chat
- Incorporation of Medical Scribe support promotes efficiency and increased compliance -- two sets of eyes are better than one to check admission POC's .
- Meet our Medical Scribes
 - Tara Gubac --- Registered Nurse for 15 years
 - Focuses on F2F support, pre visit preparation, and post visit documentation support
 - Rainessa "Nessa" Gonzales --- Registered Nurse for 10 years
 - Focuses on intake forms, individualized emergency plans, and comprehensive assessment
- Teams is the best way to contact the Medical Scribes. They are both very prompt, so if you do not hear back from them within 1 hour, contact Angie Wilt for assistance.
 - They work 9AM-6PM EST
- Mandatory requirement to utilize the Medical Scribe (Tara Gubac) for post visit admission support
 - Federal Reg. G520- Admission POC's must be sent within **5 DAYS** of SOC --- Tara helps to support that!



Clinical Chart Audits

- Added 45-day onboarding audits for new RNCMs & Admission Nurses
- Added triggered audits for safety events, billing denials, and survey findings
- Added OASIS accuracy as a scored audit category when applicable
- Added Critical Deficiency escalation for any category scoring 0%
- Increased passing audit threshold to 90%
 - Average audit score for Q1 was 90%!
 - Raising the passing score will increase compliance & ensure our charts are survey-ready
- Added escalation pathway for repeated failed audits
- Implemented formal audit dispute process
- Linked audit trends directly to QAPI reporting and education tracking
- Established audit record retention, filing timelines, and monthly reporting requirements

Reminder from QA RN's- Ensure your comp. assessment matches your POC. The Comprehensive Assessment category on the audit tool is worth 15points!



Authorizations

- Authorizations continue to be an ongoing issue. Coordination between operations, clinical team, Jenny Cole, and Jessica Bullard is essential so we can get authorizations for our patients.
- Jessica Bullard is our Authorizations and Appeals Nurse. Contact her for any patient authorization issues
- Jessica is working hard- She has gotten 129 partial approval/denials totally approved. She has done 154 reconsiderations, 73 appeals, and 18 peer to peer reviews, and 11 state fair hearings!
- Reminder: Pay attention to POC hours- If total hours/week and hours/day x days/week does not match, only the total hours/week will be approved. Ex: 5 hours/day x 2 days/week- not to exceed 6 hours/week. Only 6 hours/week will be approved.
- Summary MUST include everyone living in the home, if they work in or outside of the home, are disabled, are >70, are children <18, or if the person in the home is NOT comfortable with providing the patient with ADL assistance.
 - Must note if the other people living in the home provide the pt's waiver hours through our agency or another company
- Must detail hours obtained from any Medicare/Medicaid agency- waiver (DD/ATTC, etc.), in-home therapies and nursing , ABA therapy, daycare, school, etc. Insurance can gather this information from multiple sources. They can deny our auth if we present inaccurate information!



Authorizations

- Traditional auth are causing the most issues- POC must be signed within 7 days of the next auth. If a PA is coming up, please schedule the RC early in the RC window so PCP has extra time to sign the POC for the next PA.
- Humana is totaling hours from waiver and HHA to show a combined max hours/day the patient could be using. Example- Mom is preferred CG for pt's HHA hours- 8x7- and pt's DD hours. PA HHA hours were cut to 8x5 as 16 DD hours/week could be used for weekend coverage. This decision was upheld at a State Fair Hearing.
- Cases where hours are most commonly being cut are for patients who live with a family member and family is a Medicaid-paid caregiver.
- RN's should discuss the possibility of auth modifications with patients and family members at RC. We will do everything we can to fight for their hours. However, hours are being modified for patients who live with a preferred caregiver and appeals are not effective.
- [Appeals Process.docx](#)
- [Standard Operating Procedure - Denials and Appeal process.docx](#)
- [Submitting PAs Bulletin.pdf](#)
- These include important info about crucial timelines.



Home Observation Visits

- HHA observation is required bi-annually per Indiana regulation. RN must observe HHA providing hands-on personal care
 - Allowable Tasks include: Bathing, hair care, skin care, incontinence care, toileting, etc.
 - Med reminders, repositioning, housekeeping, etc. are **not** allowable tasks for a home observance
- Field nurses do not require a home observance. They require an annual competency of nursing skills.
- To complete a home observance: Complete an Adobe Home Visit Observation form. Enter a communication note as type "home observance" under the HHA in Matrix and tag the patient as a related entity. Note should include type of care provided and if re-education was required. Example:

The screenshot displays a software interface with three tabs: 'Details' (selected), 'Related Entities', and 'History'. Below the tabs, there are several fields:

- Office: Admin Office (dropdown)
- Share Level: Everyone (dropdown)
- Start: 5/1/2026 (date dropdown), 11:23 AM (time dropdown)
- End: 5/1/2026 (date dropdown), 11:38 AM (time dropdown)
- Duration: 0.25 Hrs
- Type: Home Observation (dropdown)
- Notes: Observed HHA performing bathing with patient Susie Smith. No concerns noted with care provided. Ann Naylor, RN.

- Under the HHA's expirations - Update the home observance expiration to 6 months from the last observance date.
 - Example: Home observance completed on 5/1/26. Next home observation expiration will be due 11/1/26.
- Upload home observation tool to patient's POC attachments

EMR Update

Rejoice! A new EMR system is coming 🎉

- Key improvement focus areas include:
 - Efficiency
 - Reduction of double documentation
 - Goal to incorporate all forms/documents into the new system
 - Better compliance tracking



General Housekeeping

- Updated Knowledge Center Articles- Post hospital & post fall checklists are a useful tool to prevent future hospitalizations
 - [visit checklists](#)
 - [post-hospital](#)
 - [post-fall checklists](#)
 - [BAA](#)
- Medicare certification deadline for home health agencies was extended.
 - Agencies have until 6/30/27 to become Medicare certified if initiated prior to April 1, 2026
 - Administrators are evaluating when to begin admitting Medicare-level skilled nursing patients for licenses- stay tuned for more information!
- Effective 5/18/26 -- we are no longer admitting new referrals if they are in a Medicare episode.
 - No change at this time for current clients in Medicare episode
 - Care coordinate, update POC, obtain BAA, and decrease hours
- Leadership update – As a reminder no changes to the RN reporting structure – RNCMs still report to Nurse Managers and Nurse Managers still report to Amber



Questions???



Clinician of the Quarter

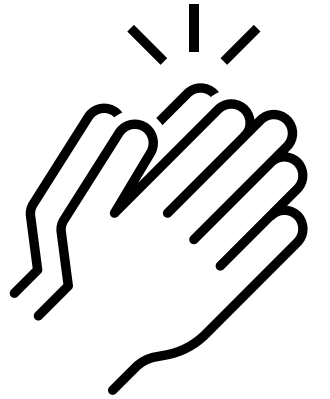
- **What???** Opportunity to show recognition and appreciation to a RNCM/Admission Nurse
- **When???** 1 Nurse recognized each quarter
- **How???** Nominated and voted on by Indiana Clinical Leadership
 - Takes into account the big picture
 - ◆ Attitude
 - ◆ Teamwork
 - ◆ Compliance
 - ◆ Chart audit scores
 - ◆ Caseload
 - ◆ Etc.....



Clinician of the Quarter

Shout outs.....

- **Katie Webb** (East Region)
 - ◆ “always jumping in to help”, “advocate”, “amazing nurse, fantastic role model and leader”, “ first to respond when help is needed”
- **Michelle Bryant** (Central Region)
 - ◆ “exceptional nurse”, “dedicated advocate”, “ resilient”, “flexible and positive”, “ collaborative”, “willingness to go above and beyond to support those in her care”
- **Christine Turner** (Central Region)
 - ◆ “compassionate”, “dedicated to her patients and colleagues”, “mentor”, “flexibility and a willingness to support the team”
- **Courtney McIntosh** (Southeast Region)
 - ◆ “dedicated”, “professional”, “maintains the highest standards in her work”, “selflessness”, “team first mentality”, “hardworking”, “willingness to step in wherever needed”



Q1 2026 Winner.....

Elizabeth Gunselman (Southwest Region)

Elizabeth Guseلمان consistently goes above and beyond in her commitment to client care. She dedicates significant time to each individual, ensuring that all needs are met while fostering strong, trusting relationships. Over the past six months, Elizabeth has facilitated the admission of two current clients to skilled nursing services to support medication management, recognizing that they were missing doses, unable to independently organize their medications, and lacked family assistance.

Despite the extensive demands associated with skilled nursing—including the completion of OASIS documentation—Elizabeth willingly took on this additional responsibility to help her clients remain safely in their homes for as long as possible. She regularly manages a caseload of high-acuity clients with professionalism and attention to detail, consistently ensuring quality outcomes.

Elizabeth is also highly diligent in her follow-up care, completing numerous incident reports and conducting additional visits to ensure her clients' ongoing safety and well-being. With nearly seven years of service at Adaptive/Help at Home, she remains a highly valued and dedicated member of the team.

Thank you, Elizabeth, for all that you do for your clients, peers, caregivers, and coworkers around you!



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Use the "Shape Fill" to change colors.



