Field Chart - Auto QA Process

If certain percentage of submitted Visit Notes requires 'Automated QA acceptance' from Field chart then KanTime has a provision to achieve this with the feature called "Auto QA".

In order to enable this feature please place a request to KanTime Team. This Agency setting requires a set of initial parameters to configure and work and they are as follows:

Note: This feature has been refined and tuned further in this Release to ensure it works as it is expected.

Settings Required Include:

- **Configuration to set the % of Notes to be Auto QA accepted:** Say if 90% is set at Branch level, then for the first time acceptance of Visit Notes from Field chart a total of 90% from the complete total of submitted Charts will be accounted for Auto Acceptance.
- **Configuration to exclude certain Disciplines Charts and Note Types:** Along with the % total setting KanTime for time being excludes Assessments and Evaluation Notes from being Auto QA'ed. This is made as a default setting for now and cannot be overridden at the Field Chart settings options as well.
 Further to this, it also allows to configure Charts to be driven from certain Clinician Disciplines. Ex: If Agency support RN, ST, PT and PTA, then it is possible to configure the Auto QA process only for ST and PTA Clinician Charts specifically.
- **Clinician Profile setting to "Exclude From Field Chart Auto-Approval"**
  Once the Agency settings are configured the next level of setting can be made at Clinician profile level. In case certain clinician's charts are needed to be excluded from Auto QA processes then enable the setting from the respective Clinician profile -> General tab

- **Permissions driven options for Roles** must be enabled to view Auto QA button and setup from Field chart. Permissions are under - > FC Activities: Auto Approve Field Chart, Edit Auto Approve Settings. Only when the above 2 permission are set for a Role, then the following button appears in the Filed chart.
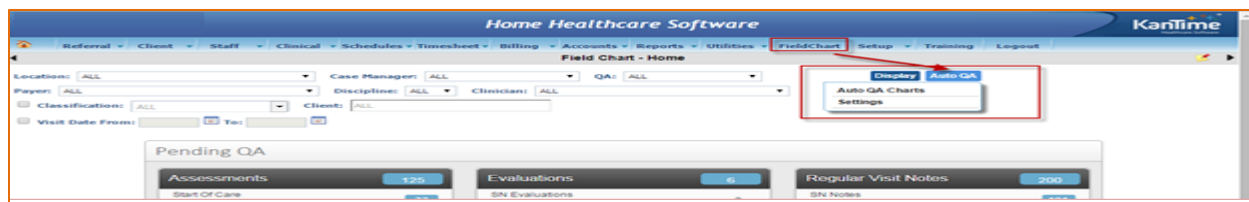
As seen in the figure, Auto QA button provides 2 options – 1. Auto QA charts and 2. Settings

- **Auto QA**: When chosen will list a set of charts that are considered for Auto QA acceptance.

From here User can view primitive chart details and hit on Continue button to process AUTO QA Auto Approval and acceptance of the pre-selected charts. Once the action is successful, then those set of charts will be off from the Pending QA Counters of Field chart with Approval Time stamp.

- **Settings**: When opted will provide a wizard as below. Select the Location to which configurations needs to be overridden or modified from Agency setting configuration. New settings apart from Agency Settings can also be turned on from this wizard.

This wizard displays the % set for automation, and list disciplines or discipline charts to be included in the Auto QA process etc. To apply discipline charts, check mark the respective boxes. If nothing is selected then all the Clinician Discipline Charts will be taken into consideration.

If specific Clinicians are excluded from this process (by enabling the exclusion flag at Staff profile) then wizard list those with Staff names and its details under Exclude Clinicians section.

- ✦ **Considerations/ Criteria's for Visit selection for AUTO QA:**
  - Only those charts submitted to QA and that are 'Approval Ready' (without any mandated deficiency) will be considered for listing in AUTO QA wizard.

- Best scenario: Say if 90% is set at Agency level for all branches or specific and we have 100 charts that are Deficiency free then 90 charts will be shown in the Auto QA wizard to automatically approve and accept.
  When approved and accepted then those 90 charts will be taken off from the Field Chart automatically. And Remaining 10 Notes will be left for the QA person to perform manual QA process and acceptance.
- Among these 90 visits, if there are 9 Clinicians involved in these charts, then 10 visits for each 9 Clinicians will be considered for batch processing.
- Once the Auto QA is done then the next AUTO QA can be done only when a new batch of charts are submitted post the current Auto Batch Processed Time.
- In case there are any Assistant Notes within this processing batch then those will be auto approved with Supervisor Signature and will be off from the Assistant Note counter from Field Chart.