HospiceTools™
How Hospice Happens

Back-office Checklist

This checklist is for those clinical related items that are typically done by non-credentialed or back-office staff.

Title	Notes
HIS DASHBOARD	Use upon Admission, Discharge, or to Void a previously submitted HIS form. Use HIS Dashboard in 360° to check individual and bulk patient statuses. Export forms individually or in bulk as a zip file for upload. HIS form fields flow from relevant chart forms. Review & confirm information. HIS fields remain editable until e-signing & submission.
IDG DASHBOARD - PREP THE DAY BEFORE IDG.	1. Run IDG Agenda in IDG Dashboard in the 360° Dashboard & reporting page. 2. Review all patients to confirm pt. information & notify team members of overdue Care Plans and prep upcoming certifications. 3. Keep all IDG Update forms as unfinished documents on the dashboard so IDG notes may be entered in real-time as the team works down the agenda sheet. 4. Complete IDG Update form with fast dashboard e-signing by team.
CAHPS DASHBOARD	Run Monthly to download CAHPS Survey data, verify data, and upload file to CAHPS survey vendor portal.
PBM MANAGEMENT (IF APPLICABLE)	1. Upon admission: Export patient face sheet & med list for fax/email to PBM. 2. Bi-weekly typically as part of IDG process, export Med Changes Report (in 360° report section) and fax/email to PBM.
PROGRESS NOTE	Use to document any communication a back-office staff member has with patients or caregivers

Notes