
This Quick Reference Guide (QRG) outlines how to perform a patient acuity audit in Clairvia

Perform Patient Acuity Audit

As a Patient Outcome Expert, or POE, you will apply nursing judgment to the acuity audit process as you validate reliability and assist in discovering charting deficiencies and/or mapping discrepancies. Conducting acuity audits and peer reviews in a timely manner helps improve the patient acuity process.

Select Patient and Setup for Audit

In this lesson, you'll become familiar with how to select the patient and print a blank assessment.

➤ **From the Employee Dashboard:**

STEP 1: Click **Acuity**; then click **Assessment Status**.

NOTE: When selecting a patient for an audit, we look for three criteria:

- The patient must have a completed assessment (review the Status column).
- The assessment must have been completed within the last six hours (review the Assessment Date and Time column).
- Lastly, if possible, select a patient whose acuity score is outside the normal range for the unit (review the Acuity column and Acuity Summary grid).

STEP 2: Click **Acuity**; then click **Patient Assessment Audit**.

STEP 3: Select the appropriate facility from the Selection Criteria section on the left.

STEP 4: Select the appropriate Profile/Location check box. The patient list displays.

STEP 5: Click the patient name. The patient's details and a blank assessment display.

NOTE: It is now critical to make note of two key pieces of information:

- The PEN (Patient Encounter Number), which is also known as the FIN, and
- The assessment date and time. You will later need these two pieces of information in order to view the clinical documentation supporting the assessment.

STEP 6: Click **Audit Printable View**  on the right to print a blank assessment. The Patient Assessment Report displays.

STEP 7: Click the  Ellipsis icon in the upper-right corner of the report.

STEP 8: Click Print. The Print window displays.

STEP 9: Confirm the settings; then click  again to save and print the report. You are now ready to proceed with the audit.

Perform a Patient Assessment Acuity Audit

Now that you've selected the patient and printed a blank assessment, it's time to perform the audit.

➤ **From the Patient Acuity Assessment screen:**

STEP 1: Click **Reports** in the menu bar; then click **Acuity**.

STEP 2: Click **ClinDoc Assessment by Patient**. The ClinDoc Assessment by Patient screen displays, and this is where you need the two key pieces of information (PEN and Start Date/Time) discussed in the previous lesson.

STEP 3: Click the **Patient Encounter Number** field; then enter the PEN.

STEP 4: Click the **Start Date/Time** field; then enter the start date and time.

NOTE: The value in the Show Outcome Rating field must always be No.

STEP 5: Click [Run Report](#). The report displays and shows all the information used to generate the acuity score. During your audit, you will need to review this documentation and apply nursing judgement to determine your own scores.

STEP 6: Verify the assessment date and time in the upper-left corner of each page to ensure that you aren't auditing an older assessment.

STEP 7: Compare each Observation Value to the corresponding Observation Score. The 1-5 Score should align with the severity of illness represented by the Value.

STEP 8: Review all Observation Values within the Outcome group, applying your nursing judgement.

STEP 9: Assign an overall 1-5 score for each Outcome Group based on the documentation in the report.

STEP 10: Scroll down to display additional Outcome Groups; continue auditing as you did in steps 7, 8, and 9.

STEP 11: Click the  **Minimize** icon in the upper-right corner to pull up the Patient Assessment Report that you saved earlier; this is where you will manually mark down your score.

NOTE: A visual at the top reminds you of the range of scores, with 1 being abnormal and 5 being the most normal.

STEP 12: Mark the scores by using the  **Draw** tool at the top to circle the appropriate scores; continue until all Outcome Groups have been scored.

NOTE: If an Outcome Group listed on the blank assessment is not found in the ClinDoc report, mark it as "No Data." The possible reasons for there being no data:

- There has been no documentation supporting that outcome group in the past 24 hours.
- Documentation was captured only through flagged annotations.
- The documentation is present, but not being captured by Clairvia.

STEP 13: Click the  **Save** icon in the toolbar to save. Now, it's time to transpose the audit results in Clairvia.

STEP 14: Click **Acuity** in the menu bar; then click **Patient Assessment Audit**.

STEP 15: Verify the selection criteria in the Navigation Pane on the left, modifying it as necessary.

NOTE: If you must audit retroactively, you need to enter the appropriate date and time. When auditing in real time, you do not need to modify the date and time.

STEP 16: Click the appropriate value for each category, using the printed Patient Assessment Report for reference.

STEP 17: Scroll down to document audit results for the remaining categories.

STEP 18: Click  when you are finished.

Review Patient Assessment Acuity Audit Documentation

The next step is comparing your scoring to that of Clairvia to determine the reliability of the data and identify the disconnects.

➤ **From the Patient Acuity Assessment screen:**

STEP 1: Click **Reports** in the menu bar; then click **Acuity**.

STEP 2: Click **Acuity Interrater Reliability**. The Acuity Interrater Reliability screen displays.

STEP 3: Review the Facilities and Profiles sections to verify your previously made selections.

STEP 4: Verify the Start Date and End Date sections, modifying them as necessary to capture the exact start date and end date of the assessment.

STEP 5: Scroll down; review and verify the remaining values.

STEP 6: Click . The Summary section at the top shows Clairvia's tabulated totals for the assessments and outcomes that were audited and the resulting acuity calculations.

STEP 7: Scroll down to see the Audit Results screen. This area of the report summarizes the levels of agreement between the auditor and Clairvia when scoring each Outcome Group. The Average section at the bottom shows agreement percentages; higher Interrater Reliability scores indicate agreement between the auditor and Clairvia.

STEP 8: Scroll down again.

NOTE: Different font colors indicate areas of concern:

- Black text indicates absolute agreement.
- Blue text indicates near agreement.
- Red text indicates severe deviation between Clairvia and auditor scoring; anything in red text needs to be reported in ServiceNow. Reporting is covered in the next lesson

STEP 9: Use the Interrater Reliability report to facilitate a conversation with the nurse that completed the original Patient Assessment.

NOTE: Questions to consider for the conversation:

- Is there disagreement on the patient's clinical status?
- Is Clairvia missing pertinent documentation points?
- Is there opportunity to use iView documentation fields to avoid flagged annotations?

Create a ServiceNow Ticket

After you're finished with the scoring portion of the audit, it's time to report discrepancies through ServiceNow. Reporting discrepancies is how you can initiate change to improve the acuity system.

➤ **From the Self-Service portal's search screen:**

STEP 1: Click the **Search** field; then enter the search word.

STEP 2: Click the appropriate matching result.

STEP 3: Click the **Cost Center** field; then enter the cost center.

STEP 4: Click the **Type** drop-down arrow; then click **Report Audit Discrepancy**.

STEP 5: Click the **Clairvia Profile** field; then enter the profile name.

STEP 6: Click the **Date and Time of the Acuity Assessment** field; then enter the date and time that matches the assessment date and time used earlier in your audit.

STEP 7: Click the **Patient FIN/PEN** field; enter the patient identifier.

STEP 8: Scroll down to complete remaining mandatory fields.

STEP 9: Click the **Interrater Reliability Report** drop-down arrow; then click **Yes**.

STEP 10: Scroll down to display outcome groups.

STEP 11: Select each check box that pertains to severe deviations (red text) in the audit.

STEP 12: Scroll down to display additional outcome groups.

STEP 13: Enter why your audit scores differed from Clairvia in the mandatory text box as well as any optional comments.

STEP 14: Scroll to the end.

STEP 15: Click the  Add attachments link to attach a copy of the ClinDoc Assessment by Patient report.

STEP 16: Click .