# NextStep SOLUTIONS
**Moving Behavioral Health Forward**

# MOST QRG

MOST (Measure of Success Tracking) is an audit and compliance tracking tool in NextStep Solutions that has been integrated for Agencies with the MOST package. The software provides internal auditing and reporting services for questions limited to Yes/No/N/A answers, where "Yes" means compliance and "No" means non-compliance.

## Assign MOST User Permissions

### Assign MOST Permissions

In order for employees at your Agency to be able to access MOST Interactive and create audits, they must be given specific permissions. These permissions are typically assigned to Admin Users who would manage tags, persons, and roles, run reports, and/or create questions and question sets for audits.

1. Navigate to Maintain Users: **Navigation Menu > Maintain Users**.
2. Click the **User** drop-down, select a user.
3. Assign the user the permissions that he/she will need to access MOST, run reports, and/or create audits:
   a. In the Clinical Forms section, select the checkbox for **MOST Interactive**.
   b. In the MOST Interactive Permissions section, select the necessary permission checkbox(es) for the user:
      - *(Optional)* **Manage Audit tags, persons, roles**
      - *(Optional)* **Run/View Organization-wide Reports**
      - *(Optional)* **Create/Edit Questions/Sets**
4. At the bottom of the page, click the **Update User** button.

### Assign User Role to Run Audits

In order for employees at your Agency to be able to run audits in MOST, they must be given access to MOST Interactive and assigned a specific User Role.

1. Navigate to Maintain Users: **Navigation Menu > Maintain Users**.
2. Click the **User** drop-down, select a user.
3. In the Clinical Forms section, select the checkbox for **MOST Interactive**.

4. In the MOST Interactive Permissions section, click the **Role** drop-down and select **Audit User**.

5. At the bottom of the page, click the **Update User** button.

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## Create Custom Questions

MOST Interactive comes with audit questions that are based on widely-used national behavioral health standards such as JCAHO, CARF, or COA. However, you can also create custom questions by following the steps below. **Note**: Repeat these steps to create all of the questions for the audit.

1. Within NextStep Solutions, navigate to MOST Interactive: **Main Menu > Clinical Forms Menu > MOST Interactive**.

2. Click the **Menu** button.

3. Click the **Questions** button.

4. Click the **Add Question** button.

5. Complete the following to create a question.

    a. Click the **Type** drop-down and select **Clinical** or **Non-Clinical** to specify the type of question.
    **Note**: To create additional Types, navigate to **Menu > Questions > Manage Types > Add Type**.

    b. In the **Question** field, type a question so that the auditor knows what to look for. The question must be worded to elicit a Yes/No response where "Yes" indicates compliance.

    c. In the **Section** field, type a section name or click the drop-down to select a previously created Section. The Section will be grouped together when creating Question Sets, so it is helpful to assign the same Section to all questions that will appear in a Question Set.

    d. *(Optional)* In the **Sub** field, type in a sub-category to the Section to categorize the group of questions.

    e. *(Optional)* In the **Subsub** field, type in a subsub category to categorize the group of questions even further. When an audit is run, questions are displayed by sub and then subsub sections in a ribbon.

    f. *(Optional)* In the **Citation** field, type which standard is being referenced by this particular question.

    g. *(Optional)* In the **Help Text** field, type additional information to help with clarification of the question. When the audit is being run, a link to the Help Text will be available for the auditor.

    h. In the **Hyperlink to Chart** section, select one of the following radio buttons to tie a question directly to a specific area of a client's chart in NextStep. When a link is provided, the auditor can navigate to the specific area referenced in a separate browser by clicking the hyperlink in MOST.

    - **No Link**: No link will be provided.
    - **Link to Form**: Ties a question directly to a Form. Complete the From Type and Form Name fields to specify the Form to link. The Form Field is optional.

- **Link to Note**: Ties a question directly to a Note.
- **Link to Document Center**: Ties a question directly to the Document Center.
- **Link to Treatment Plan**: Ties a question directly to a Treatment Plan.

6. Click the **Save** button.

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## Create Question Sets

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Questions must exist in MOST in order to create a Question Set. You can create a Question Set using custom questions or MOST standard questions (Ex: pulling together questions in a Question Set for a quarterly chart review).

1. Navigate to Question Sets in MOST Interactive: **Main Menu > MOST Interactive > Menu button > Question Sets button**.
2. Click the **Add Question Set** button.
3. In the **Choose a Name** field, type a Name for the Question Set. This is displayed in menus, reports, and Ribbons.
4. Click the **Select a Standard** drop-down and select one of the following options to determine which type of questions will make up the Question Set.
   - **Custom-Built Questions Only**: Select this if you created custom questions.
   - **CARF or COA or JCAHO**: Select the appropriate standard to run your audit for.
5. Click the **Next** button.
6. Click the **Select Questions, Fee & Type** drop-down and select **Regular Question Set**, if not already selected. **Note:** If your Agency created custom Question Set Types they would show in the drop-down. To create custom Question Set Types, navigate to **Menu > Question Sets > Manage Types > Add Type**.
7. *(Optional)* In the **Fee** field, specify a fee.
   **Note**: The Fee is normally left at $0.00. MOST provides "risk reports" that estimate the cost of recoupment if an external audit doesn't go well. However, if the Question Set pertains to a particular service then the fee would be set to the customary fee for that service.
8. *(Optional)* In the **Reviewer Instructions** field, provide instructions for the Auditors.
9. In **Custom Sections**, select the checkbox(es) for the Section(s) to add to the audit. These are the Section(s) that were created in [Create Custom Questions](#). As a Section is selected, its respective ribbon is displayed to the left that groups all questions associated with that Section.
10. Select the questions to run the audit on.
    a. Click the **Ribbon name** to expand each Section.
    b. Click the **Select All** button to bulk select all questions or individually select the checkbox(es).
11. Save the Question Set using one of the following options.

- **Save & Make Available**: Saves the Question Set and makes it available for an audit to be run.
- **Save & NOT Available**: Saves the Question Set but does not make it available for an audit to be run.

## Create a Batch of Clients

Once the Question Set has been created, you will need a batch of clients for the Auditor to run the audit against. The most common way to run audits is with a random batch of clients. The steps to create a random batch are listed below. If an audit is needed for an individual client, use the **Create New Audit** button rather than following the steps. **Note**: A user set up with the Audit User Role, Assign User Role to Run Audits, will start the audit process here.

1. Navigate to Audits in MOST Interactive: **Main Menu > MOST Interactive > Audits button**. The Audits page is displayed with all audits that have been created and their status.
2. Click the **Audit Batches** button.
3. Click the **Create Batch** button.
4. Select the appropriate **Filters** checkbox(es) to generate a random batch of clients.
   - **Admit Date, Into**: Select or type the **From** and **To** dates (in MM/DD/YYYY format) to specify clients admitted into a program during this time frame and click the **Into** drop-down to specify the program.
   - **Discharge Date**: Select or type the **From** and **To** dates (in MM/DD/YYYY format) to specify clients discharged during this time frame.
   - **Last Seen Date**: Select the **From** and **To** dates (in MM/DD/YYYY format) to specify clients with a last seen date during this time frame. The Last Seen Date is based on when a Note or Form was documented.
   - **Therapist**: Click the **Who** and **Role** drop-down(s) to specify clients who see a specific Therapist.
   - **Location**: Click the drop-down to specify clients seen at a specific location.
     **Note**: It is recommended to select another checkbox along with Location to further narrow down the list of clients.
   - **How Many?**: Type the specific number of clients for the batch in the **Num** field or add a **%** of clients.
   - Select the **Remove entry from results if visit exists in previous batches** checkbox to generate a batch of clients who were **not** selected in a previous batch.
5. Click the **Request Batch** button to create a random list of clients who match the filter criteria.
   **Note**: The How Many? fields are capped at 100 clients. If your search criteria produces over 100 clients, a message is displayed, "The number of records that meet the criteria (X) exceeds the maximum allowed of 100." Adjust your search criteria as necessary.

## Assign Audit Reviewers

The Create Audits From Batch page is displayed once the random list of clients has been created in [Create a Batch of Clients](#).

**Assign Reviewers for the Audit**

1. In the Assign Reviewer(s) (Required) section, select one of the following options.
   - Click the **Select Single Reviewer** drop-down to select a single reviewer for the audit.
   - Click the **Select Reviewer Group** drop-down to select a group of reviewers.

   **Note**: To create a Reviewer group, review the [(Optional) Create Reviewer Group](#) section below.

2. *(Optional)* Click the **Assign Manager (Optional)** drop-down to assign a manager to the audit. This user can lock any audits that are finished or make changes to the audit on the Audits page.
   - *(Optional)* Click the **Review Required** checkbox to require the manager to review the completed audit.

3. Click the **Choose Ribbon(s) (Optional)** button. **This is a required step** in order to be able to see the Question Sets for the audit.

4. In the middle of the page, the Question Sets are displayed. Select the checkbox(es) for which Question Sets you want for the audit, and click the **Save Selections** button.

   **Note**: If you choose the **Cancel Selections** button, you will not have any questions attached to the clients in the audit.

5. At the bottom of the page, the clients that are part of the audit are displayed. To approve which clients are part of the audit, select one of the following options.
   - In the Action column, click the **+** icon next to each client row to select specific clients.
   - Click the **Bulk Create** button to select all clients.

   **Note**: Whether you individually or bulk select clients to include in the audit, the **+** icon in the Action column will automatically change to a checkmark showing that an individual audit of the client's chart has been created.

### *(Optional)* Create Reviewer Group

1. Navigate to Add Reviewer Group in MOST Interactive: **Main Menu > MOST Interactive > Menu button > Persons button > Reviewer Groups button > Add Review Group button**.
2. In the **Name** field, type in a name for the group.
3. *(Optional)* In the **Description** field, add a description for the group.
4. To add a user to the Reviewer Group, select the user in the **Exclude** column and click the **right arrow** button. The user will now show in the Include column.

**Note**: Repeat these steps until all users have been added to the Reviewer Group.

5. Click the **Save** button.

## Run the Audit

The clients displayed on the Your Task List page, are the clients that you will run the audit on. Each client will be assigned a Case # which is used in place of the client's name. The audit will be run manually by completing each line item. **Note**: Repeat these steps for all clients on the Your Task List page.

1. Navigate to Tasks in MOST Interactive: **Main Menu > MOST Interactive > Tasks button**.
2. Select the **Checkmark** on the client row to run the audit.
3. The Audit Answers page is displayed and the client's audit information is at the top. To expand the Question Set, click the **Ribbon**.
4. Read the first question in the audit and complete the question using one of the following methods:
   - Select the appropriate radio button in the **Yes/No/N/A** column.
   - Click the **link** icon to the left of the question to open a specific page in NextStep in a new browser tab. The link that is displayed is based upon what you selected as the "Hyperlink to Chart section" when creating the question.
     a. After determining your answer for the question, click **Main Menu** in the NextStep Navigation Menu to refresh your site. If you do not refresh and move on to the next linked question, you may not be brought to the correct page.
     b. Click the **MOST** browser tab to go back to MOST to answer the question.
     c. Select the appropriate radio button in the **Yes/No/N/A** column.
5. In the Status & History section, select one of the following options:
   - **Save/Return**: This saves the questions that you completed but not take the client off of the list. You will automatically be returned to the Your Task List page where you can move on to the next client.
   - **Finished**: This saves the audit that you completed and removes the client from the list. You will automatically be returned to the Your Task List page where you can move on to the next client.

## Review Audit Reports

Once an audit has been run, the following Audit Reports, accessible by clicking the **Reports** button in MOST Interactive, can be used to provide compliance data.

- **Audit Detail / Risk Report**: This report displays all questions for a single audit on an individual client and identifies exact problem areas. The **Start Date, Stop Date,** and **Audit** fields are required to run the report. Any reviewer can run this report on audits for which they were a reviewer.

- **Multi Audit Detail / Risk Report**: This report displays a summary of results for multiple audits at one time. Any reviewer can run this report on audits for which they were a reviewer.

   **Note**: It is recommended to filter the report to only show the necessary details, as each Detail report can contain a lot of information.

The following reports are only available to users who have been given organization-wide reporting privileges.

- **Question Set Detail Report**: This report displays a monthly snapshot of how your Agency, 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. The **Question Set** or **Question Set Type** or **Standard, Term, Start Month,** and **# of Months** fields are required to run the report.

- **Answer Totals Report**: This report provides a concise view of compliance for individual questions in a Question Set. It is similar to the Question Set Detail Report described above except that totals are given for any date range rather than grouped by month to show a pattern. The **Question Set** or **Question Set Type** or **Standard, Start Date,** and **Stop Date** fields are required to run the report.

- **Risk Detail Report**: This report displays on a per-Audit basis what recoupment risks exist. The monetary data is extracted from the fee value stored with each Question Set. The **Question Set** or **Question Set Type** or **Standard, Start Date,** and **Stop Date** fields are required to run the report.

- **Question Set / Risk Summary Report**: This report displays compliance rate data across a Question Set, a type of Question Set, or an entire standard. The **Question Set** or **Question Set Type** or **Standard, Start Date,** and **Stop Date** fields are required to run the report.

- **Audit Listing Report**: This report displays 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.

- **Make Printable Question Set**: This report displays a printable version of a Question Set. The **Question Set** field is required to run the report.

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