

# HM COMPOSITE PROCEDURE FOR COMPLETING CONSULTANT DIETITIAN REPORTS

## POLICY

HM Composite Consultant Registered Dietitians will complete facility consultation reports in a standard manner. The Facility Visit Report (formerly known as the Consultant Dietitian Visit Report) and the Facility Report Card (formerly known as the Consultant Dietitian Report Card) are to be completed and submitted electronically. The Facility Visit Report is to be completed and submitted at the end of every facility visit. The Facility Report Card is to be completed and submitted by the fifth of the month following the evaluation. All other reports are to be faxed or mailed on the last working day of the month to be received no later than the fifth of the month following.

## PROCEDURE

1. For each facility visit, the requirement is to complete and submit the Facility Visit Report electronically, preferably before leaving the facility. If the facility does not have an available computer, the report may be completed and submitted electronically from home following the facility visit.
  - a. Log onto [www.hmcomposite.com/staff](http://www.hmcomposite.com/staff). Fill in your User Name and Password.
  - b. Scroll over Dietitian Reports (directly under ON-TAP) in the menu to the left of the screen and click on Facility Visit Reports.
  - c. Choose the facility using the drop down list under "Select Facility." Only facilities assigned to you will show in the list. Choose "Other Facility" if you need to report on a facility not assigned to you. Another box below the facility box will appear for you to enter the facility's name.
  - d. Your name will display at the top right part of the screen. Enter your RD number in the box under your name labeled "RD Number." Enter the Administrator's name in the box labeled "Administrator."
  - e. Enter the visit date. Enter the actual hours at the facility using the Time in and Time out drop down lists to complete the time and AM or PM. Check the meal observed. At each visit, some meal observation should be done.
  - f. Check the box next to "Brief Sanitation review completed." At each visit some sanitation checking should be done (i.e. if outdated leftover food has been noted before, check this item. If temperature logs were not completed, check this item.)

## HM COMPOSITE CONSULTANT DIETITIAN REPORT PROCEDURE (cont.)

- g. Check the box next to “Nutritional care documentation completed.” Submit copies of Resident Recommendations to the Director of Nursing, Dietary Service Supervisor and other facility staff per facility practice. All residents visited or documented on should be listed (even if there are no recommendations.) Copies of recommendations are to be retained in the Dietitian’s binder at the facility and are usually NOT taken outside the facility or sent to HM Composite offices unless directed to ensure HIPAA compliance.
- h. Check the box next to “Completed comprehensive observation” only if this is the visit when you are electronically completing the Facility Report Card (see no. 3 of this policy). At a minimum, the Facility Report Card needs to be electronically completed and submitted monthly (or quarterly for facilities on a quarterly schedule.)
- i. Check the box next to “Other” only if you completed an activity not specified in one of the other boxes and enter the activity in the space provided.
- j. Write any comments related to this visit in the Comment Box to the right of the screen. (i.e. name of Inservice given or note that the Dishmachine temperature log was properly completed.)
- k. In the Next Visit box under the Comment box, enter the date of your next visit to the facility.
- l. **Click the Save button. If you click on the Close button without saving first, the data you have entered will be lost.** By clicking the Save button, the report is electronically transmitted to the HMC server.
- m. If the administrator would like to receive the Facility Visit Report by email, fill in the administrator’s email address in the box labeled “Email Report Card to” and any message in the box labeled “Email Message.” Then click the Send button. If the administrator would like any other facility staff to receive the report via email, you can enter in additional email addresses and click the Send button.
- n. If the administrator prefers a paper copy of the report, click on the Print button located at the top middle of the screen. If you print the report, sign your name at the bottom. Photocopy the completed form if it needs to be distributed to other facility staff per facility practice.
- o. The Facility Visit Report should be electronically completed and submitted following every facility visit. If possible, it should be completed at the facility. If the facility does not have an available computer, the report can be completed at home following the visit. The report should be submitted no later than the 5<sup>th</sup> of the month following the visit. All reports will be locked out of the HMC server by the 5<sup>th</sup> of the month.

## HM COMPOSITE CONSULTANT DIETITIAN REPORT PROCEDURE (cont.)

1. Consultant Dietitian shall print and retain a copy of this report for a minimum of two years as a professional standard. If employment terminates, return your file to the HM Composite office.
- p. An exit conference with the Administrator and/or other facility staff should be held at every visit (or a minimum of weekly for multiple visits in the same week) to review reports and establish an action plan for any problem identified.
  1. Allow time for discussion of the completed forms. Some facilities may want Consultant Dietitian to schedule an appointment for an exit interview.
  2. If the Administrator prefers the report to be printed, encourage the Administrator to sign at the bottom of the report that they have received and reviewed the report. Do not delay distributing or sending reports if signature is not available.
2. The Facility Report Card at a minimum is to be electronically completed and submitted monthly (or quarterly for facilities on a quarterly schedule.) The Facility Report Card should be completed within the consulting hours allowed for the facility. If possible, the report card should be completed at the facility. If the facility does not have an available computer, the report card can be electronically completed and submitted from home.
  - a. Log onto [www.hmcomposite.com/staff](http://www.hmcomposite.com/staff). Fill in your User Name and Password.
  - b. Scroll over Dietitian Reports (directly under ON-TAP) in the menu to the left of the screen and click on Facility Report Card.
  - c. Choose the facility using the drop down list under "Select Facility." Only facilities assigned to you will show in the list. Choose "Other Facility" if you need to report on a facility not assigned to you. Another box below the facility box will appear for you to enter the facility's name. Then click on the box labeled "Facility Report Cards."
  - d. On the next screen, the date (current date is the default), and Dietitian boxes will already be filled in. You will need to fill in the names of the Administrator and the Dietary Supervisor in the appropriate boxes.
  - e. Click on the box labeled "Add New Report Card" to begin a new Facility Report Card. If you would like to view one previously saved, use the drop down list under "Select Existing Report to View" and then click on the box labeled "Display Existing Report."

## HM COMPOSITE CONSULTANT DIETITIAN REPORT PROCEDURE (cont.)

- f. On the next screen, the information you entered on the prior screen (date, facility, Dietitian, Administrator, and Dietary Supervisor) will display at the top. Enter your RD number in the box labeled "RD Number" located underneath your name.
- g. The Facility Report Card consists of seven areas you must observe in a month: food preparation & meal service, dining observations/tray service, cleaning & sanitation, food sanitation/safety/storage, dietary management, nutrition care, and equipment.
- h. All fields must be completed with a Yes, No, or N/A. Click on the circle in the column marked "Yes" if the procedure evaluated generally meets standards of practice. Click on the circle in the column marked "No" if the procedure evaluated failed to meet standards of practice. Click on the square in the column marked "N/A" if the specific procedure is not applicable to the facility.
- i. In the column labeled "Comments," write the specifics of the item needing improvement and any other valuable information to be related to the administrator. Dietitian may also make positive comments in this section when appropriate.
- j. **The Facility Report Card may be saved at any time by clicking on the button labeled "Score/Save" located at the top of the screen. If you click on the Close button without saving first, the data you have entered will be lost.** It is recommended that you complete the report throughout the month after you observe each of the different areas covered by the report.
- k. After you have completed all areas of the report card, click on the button labeled "Score/Save" to have it automatically scored. Each of the seven sections will have a separate score. The final overall weighted score will display at the bottom of the screen under "Weighted Scoring Recap."
- l. Follow the directions noted under the "Final Weighted Score and Action" appropriate for the facility's final score.
  1. If the final score is 69% or below, contact HMC's VP of Operations.
  2. If the final score is 70-79%, contact the appropriate HMC senior supervisory staff.
  3. If the final score is 80-89%, create a plan of action in partnership with the Administrator and Dietary Services Supervisor. Enter the items not in compliance, action steps, responsible parties, and follow up dates in the appropriate boxes at the bottom of the screen.
  4. If the final score is 90-100%, monitor for improvements.

## HM COMPOSITE CONSULTANT DIETITIAN REPORT PROCEDURE (cont.)

- m. A box is available under the “Summary and Recommendations” section of the report to enter a brief summary of the facility evaluation. The summary and recommendations should appropriately reflect the total facility report card score and the action(s) taken.
  - n. Click on the red button labeled “Finish/Submit” at the top right area of the screen to electronically submit the Facility Report Card to HMC.
  - o. If the administrator would like to receive the Facility Report Card by email, fill in the administrator's email address in the box labeled “Email Report Card to” and any message in the box labeled “Email Message” located at the top of the screen. Then click the Send button. If the administrator would like any other facility staff to receive the report via email, you can fill in additional email addresses and click the Send button. Confirm receipt of the report by the administrator, either in person, at your next visit, or by email.
  - p. If the administrator prefers a paper copy of the report, click on the Print Report button located at the top right of the screen. If you print the report, sign your name in the space available directly below your printed name at the top left area of the form. Photocopy the completed form if it needs to be distributed to other facility staff per facility practice.
  - q. The Facility Report Card should be reviewed with the Administrator upon completion.
  - r. The Facility Report Card should be electronically completed and submitted to HMC no later than the 5<sup>th</sup> of the month following the evaluation. All reports will be locked out of the HMC server by the 5<sup>th</sup> of the month.
- 4. Annually the Consultant Dietitian should participate in a comprehensive evaluation of the Dietetic Services. Some facilities will schedule a pre-survey facility review and designate their forms. The HM Composite Consultant Dietitian is encouraged to annually complete the Dietetic Service Quality Assurance Checklist (page 575 in HM Composite P & P Manual).
  - 5. Other Quality Management standards, tools and forms are included in Section 10 of the HM Composite P & P Manual. Each facility Consultant Dietitian should review with Administrator or Corporate personnel to determine a schedule or frequency for completing any of these tools.

## HM COMPOSITE CONSULTANT DIETITIAN REPORT PROCEDURE (cont.)

6. Occasionally, HM Composite RD's may desire to use the form "HM Composite Consultant Dietitian Supplemental Report" to document, explain or elaborate on situations or facility plans. Use this form when negative remarks are necessary which might cause embarrassment to the facility in a survey. Use this form to document a plan of action for the facility team such as when starting new programs (i.e. dining committee) or as the plan of correction after a pre-survey or DHS survey. Documentation of problems or deficiencies is essential to maintaining credibility. Fax or mail this form to HM Composite offices when used, or on the last working day of the month to be received no later than the fifth of the month following. If your Supplemental Report is particularly sensitive or urgent, verbally notify your supervisor and fax immediately to HM Composite office.
7. In addition to the above reports, HM Composite may request additional Consultant Dietitian reporting for various facilities or clients. Your supervisor will inform each Consultant Dietitian if these additional reports are needed for your assigned facilities.

  - a. An example is the Consultant Dietitian Productivity Log, which is used to communicate daily productivity and is usually faxed at the conclusion of each visit when used. This form is usually only submitted to your supervisor.
8. HM Composite consulting clients that are part of a corporation with different forms or procedures may request their separate forms be used in place of HM Composite electronic or paper forms. Continue to complete their forms unless HMC senior staff tells you otherwise.