

Strategies for optimal staffing in Optima

1. Review projections 2.0 for all skilled pts to ensure all pts have minute templates and that any missed minutes from previous day are added back to the schedule on an upcoming day. Review projections 1.0 for all custodial pts to ensure all ARDs for CMI will still be met, ensure visits have not been missed / add in another tx day if visit was missed.
2. Under Activities, add in any prn therapists scheduled to work / update any FTE or PTE staff if their hours are altered for the day or complete this step under Appointment Book Edit Schedule tab
3. Assignment Board: Hit auto assign moving all current pts to primary care provider. If any pts are unassigned (new pts) set the primary care provider and save. Add in evals as preadmit pts
4. Appointment Book: Assess productivity for each therapist. Move pts to another therapist or adjust minutes for pts depending on resultant prod, staff time off/coverage, etc – final tweaks made. This also tells you how much you are short or over for the day. Use this to also determine if you need to move a Med B pt to a therapist by viewing the documentation column. If a recert is due – pt needs to be scheduled with a therapist. If a Med B (or any payer following Med B Rules) pt has a PR or DC Summary due, it needs to be scheduled with a therapist.