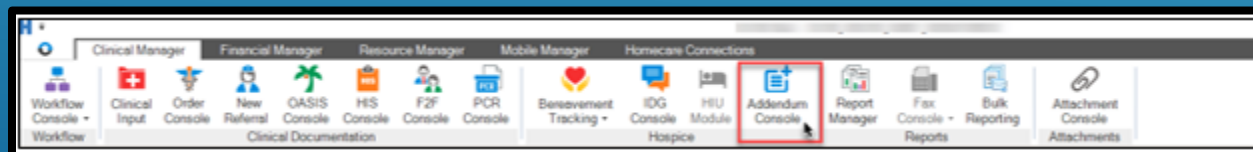# FY2021-ELECTION STATEMENT ADDENDUM

HCHB Enhancements

Addendum Tracking Console

- The Addendum Tracking Console is accessible in the back office via the Addendum Console icon found within the Hospice section of the ribbon

- The system setting 'Enable Hospice Election Statement Addendum Feature' must be enabled for the Addendum Console icon to become available

The Addendum Tracking Console is a central location within the back office where:

- Existing requests for Election Statement Addendums can be tracked

- New requests for Election Statement Addendums can be entered,

- Edits can be made to the status of Addendum Requests

- Addendum Report can be viewed

Addendum Tracking Console

- This is a screen capture of the Addendum Tracking Console with the key elements highlighted

- All requests for an Election Statement Addendum created in PointCare or directly on the console will be displayed

- By default, the Addendum Requests will be sorted by Due Date then by Patient

- Also, by default, the Addendum Tracking Console will display 5 Addendum Requests per page

- This can be modified by changing the Items per page at the bottom.

Title Bar Search

- To search for a specific patient's Addendum Request:

  - Select the search icon 🔍 in the title bar

  - Enter search criteria

- Any text entered will initiate a search of both the first and last names of the patient's with Addendum Requests

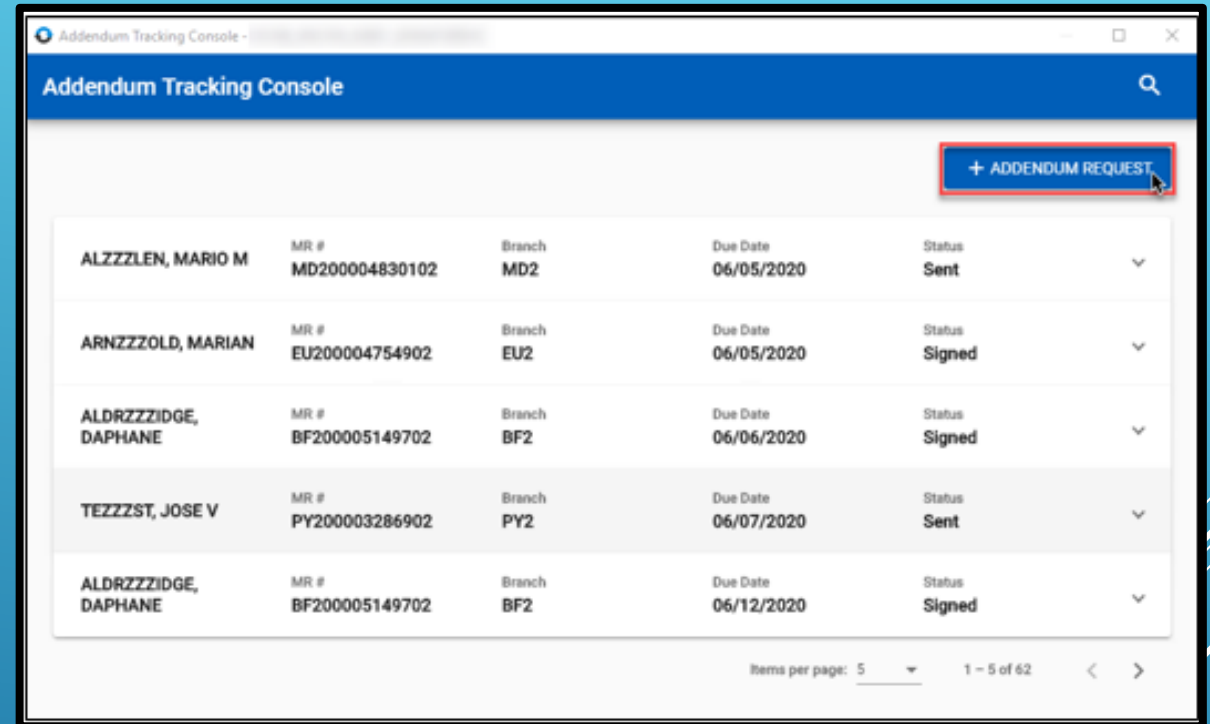- The display will adjust to only show results matching the search criteria

SELECTING THE ☒ ON THE SEARCH FIELD WILL CLEAR THE SEARCH CRITERIA AND RETURN THE ADDENDUM TRACKING CONSOLE TO THE DEFAULT DISPLAY

- Create Addendum Request

- For the most part, requests for Election Statement Addendums will come into the Addendum Tracking Console from PointCare

- For those instances where the Addendum Request needs to be initiated from the Back Office, there is the option to create an Addendum Request from the Addendum Tracking Console

- Selecting the +Addendum Request button will open the Create Addendum Request
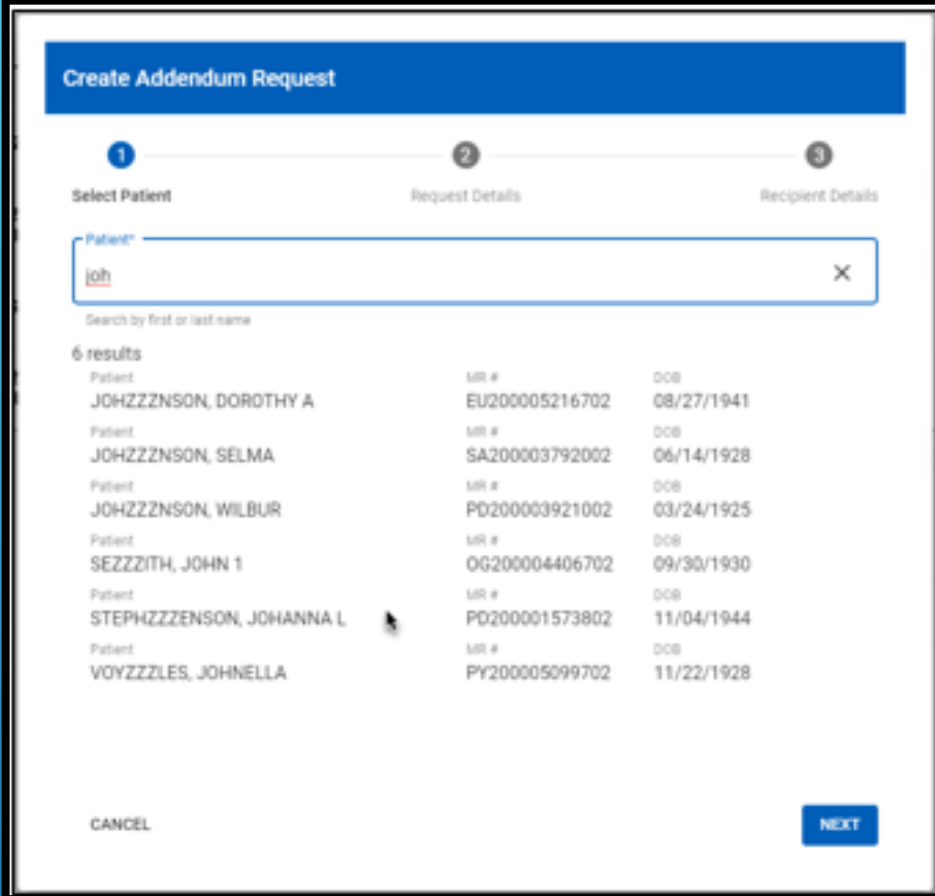
Patient Search

- To begin creating an Addendum Request, a search must be done to find the patient that is to be associated with the Addendum Request

- The search will begin with the first character entered and will search for patients with those beginning characters in their first or last names

- The more characters entered, the more refined the results will be

- For example, when searching for 'joh' the results shown are patients with those characters at the beginning of their first or last name

- Once the patient is selected from the search results, the Patient field will populate with the patient name and the row will be highlighted

- To search for a different patient before proceeding to Request Details, selecting the 'X' on the Patient field will clear the previous search

- Then new search characters can be entered

Patient Search

- Once the appropriate patient has been chosen from the search results, selecting Next will progress to Request Details

Request Details

- Request Details will show the patient associated with the Addendum Request

- There are three required elements on the Request Details and these will impact the Due Date for signature on the Addendum Request:

  - Date

  - Status

  - Type

Request Details

- *Date*:
  - This should be the date the request for the addendum was made
  - Be aware that the date selected here can greatly impact the Due Date
  - A future date is not allowed
- *Status*:
  - The Addendum Request Status when initiated is typically Requested
  - The Sent status has also been included to accommodate documentation of the Addendum Request after it has been sent for signature

Request Details

Type:

- There are two types of Addendum Requests:

  - Election: This type of request for an addendum is made as part of the Start of Care and is the initial type of Addendum Request

  - Update/Subsequent: This type of addendum request for an addendum is made when updates impact the non-covered items for the patient

Once the Date, Status, and Type have been chosen, selecting Next will progress to Recipient Details

Recipient Details

- Recipient Details will again show the patient associated with the Addendum Request

- There are two initially required elements on the Recipient Details

  - Preferred Delivery Method

  - Requested By

- The selections made for these impact which of the remaining elements may or may not be required

- Phone will always be a required field as it would be the most expedient method of contact if there are clarifications needed on the Addendum Request

Preferred Delivery Method

- The drop down includes two choices:

- In Person:

    - In Person is selected when the Addendum Request will be hand delivered to the recipient for signature

    - When this delivery method is selected all address related information will be required

Email:

    - Email is selected when the Addendum Request will be emailed to the recipient for signature. This options cannot be used until a secure patient email application has been established.

    - When this delivery method is an option and is selected the Email information will be required

Requested By

- The drop down will include an option to select either:

- Patient:

  - Patient is chosen when the patient themselves has requested the addendum

  - Selecting patient will populate the patient's address, phone, and email information from the patient record

Requested By

- Existing Contact:
  - Existing Contact is chosen when one of the patient's existing contacts has requested the addendum
  - Selecting one of these contacts will populate the contact's address, phone, and email from the contact information within the patient record

- *Note: The recipient of the Election Statement Addendum must be either the patient or an already existing patient contact*

- *If the recipient is not shown, then a new contact will have to be set up on the patient record prior to completing the Addendum Request*

Requested By

- If the Patient or Existing Contact is missing any of the required information based on the Preferred Delivery Method, the fields for that information will validate as required

- The missing information on the Recipient Details can be entered as needed

- When entering an address, selecting the ZIP will populate the City drop down

- There is no synchronization between the information entered on Recipient Details and the actual patient or contact information in the patient record

IF AT ANY TIME CANCEL IS SELECTED PRIOR TO SAVING THE ADDENDUM REQUEST, A CONFIRMATION MESSAGE WILL BE PRESENTED:

Requested By

- If at any time prior to saving the Addendum Request, changes are needed on a previous screen, the Back button can be used to navigate back to the previous screens

- Be aware that navigating from the Recipient Details back to Request Details will allow changes to that Addendum Request for the patient selected on Select Patient but the information on Recipient Details will be retained so that it does not have to be re-entered

NAVIGATING BACK TO SELECT PATIENT AND CHOOSING A DIFFERENT PATIENT WILL REMOVE THE RECIPIENT DETAILS INFORMATION AS IT WILL NO LONGER BE ACCURATE BUT THE REQUEST DETAILS WILL BE RETAINED AND CAN BE EDITED

Saving the Addendum Request
Saving the Addendum Request with a status of Requested will also initiate the workflow event/stage for the patient associated with the Addendum Request:
Election Statement Addendum/Send Requested Election Statement Addendum
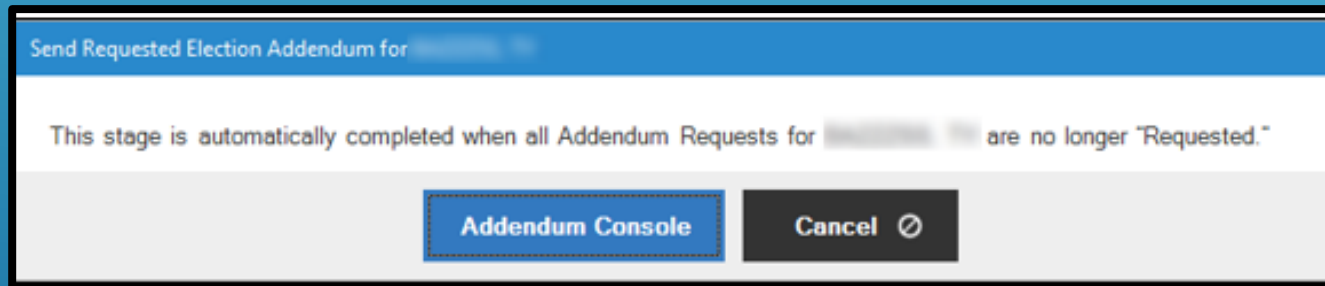
Expanded View of Addendum Tracking Console

- By selecting any row in the Addendum Tracking Console, the selected Addendum Request will be expanded to show the Recipient Details

- This is a screen capture of the Addendum Tracking Console with an Addendum Request expanded and the key elements highlighted

- The expanded view of the Addendum Request includes the options to Edit Status of the Addendum Request and to View Addendum Report

Edit Request Status

- Selecting Edit Status will open a pop-up on which changes to the Addendum Request status can be made

- Edit Request Status will show the patient associated with the Addendum Request

Status:

- Displays the current status of the Addendum Request

- All status options are always available

Notes:

- Always available and depending on status selected may or may not be required
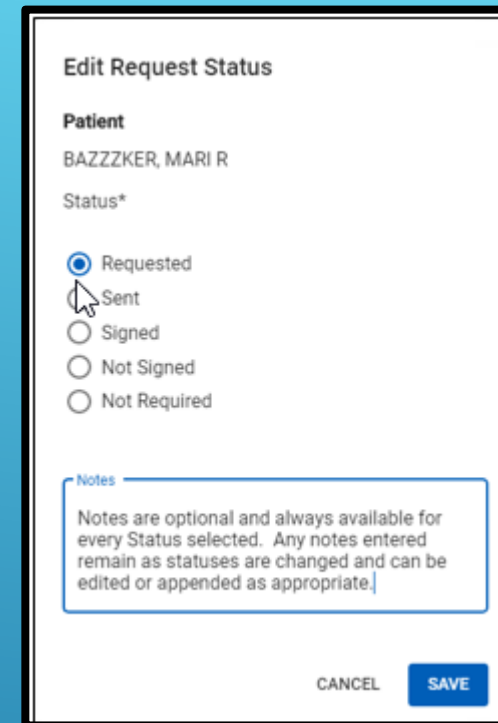
Signed:
Date field will be visible and required
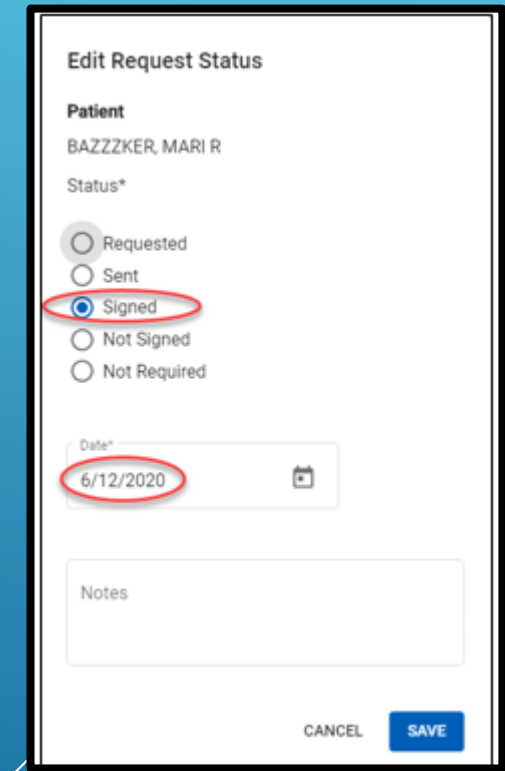
- Edit Requested Status
- Not Signed/Not Required:
  - Requires Notes
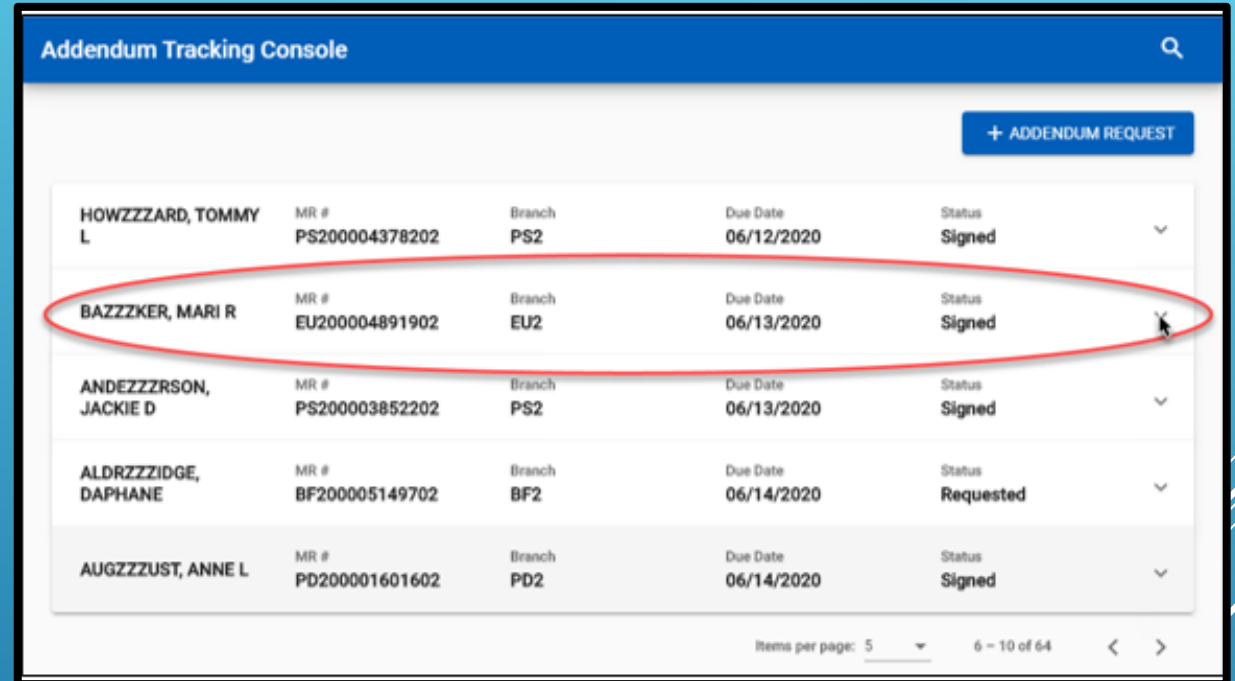
Actions related to status edits

- A *Not Required* status would be appropriate if the patient's non-covered items, services, and drugs are changed to all covered after an Addendum Request was initiated

- When the status of the Addendum Request is changed from Requested to any other status, the workflow event/stage - Election Statement Addendum/Send Requested Election Statement Addendum for the patient associated with the Addendum Request will be closed as no Election Statement Addendum will need to be sent

- When the status of the Addendum Request is changed to Requested from any other status, the workflow event/stage - Election Statement Addendum/Send Requested Election Statement Addendum for the patient associated with the Addendum Request will be added as a reminder to send the Election Statement Addendum

- If a stage already exists for that Addendum Request a new stage will not be created

- When an edit to a status is saved, the focus returns to the Addendum Tracking Console with the Addendum Request row collapsed

- When expanded, the edits can be viewed and additional edits can be made

Actions related to status edits

- When the Addendum Request status is updated to Signed, the label of Request Date will be changed to Signed Date and the date entered will be shown

Non-Covered Items and Services

- A new form, accessible in Clinical Input-> right click->Medical Records Info -> Non-Covered Items/Services, has been created to capture items or services the hospice deems as non-covered

- If patients are multi-selected in Clinical Input, the Non-Covered Items/Services menu item will be grayed out and inaccessible regardless of system permissions

- Character counter exists for Name and Reason for Non-Coverage fields

  - Name: minimum of three and no more than 100 characters

  - Reason for Non-Coverage: minimum of three and no more than 500 characters
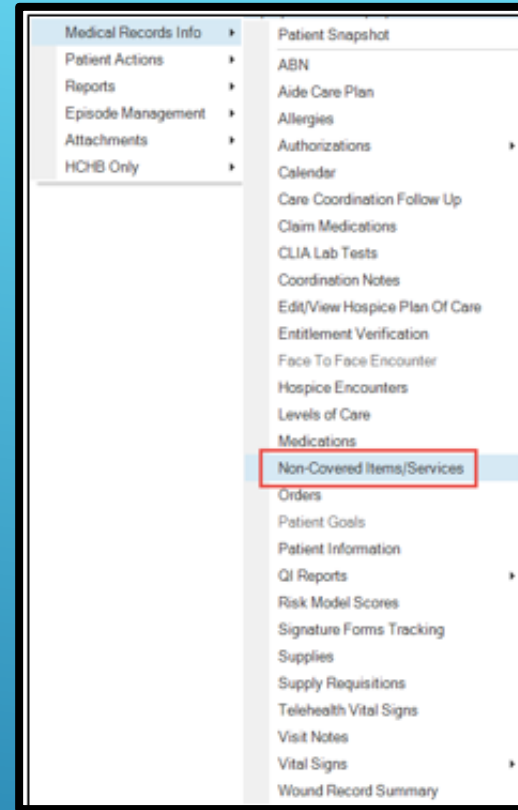
The Basics – Non-Covered Items/Services

Empty State

- If non-covered items and services have not yet been entered for the patient, users will receive notification that there is "No Non-Covered Items or Services for this patient"

Add/Edit Non-Covered Items and Services

- Assign the following system function to appropriate responsible position(s):
  - Non-Covered Items and Services – Add/Edit
- Access Non-Covered Items and Services:
  - Clinical Manager -> Medical Records Info -> Non-Covered Items/Services
- Click + NEW button or press 'Enter' on the keyboard to add a new non-covered item or service
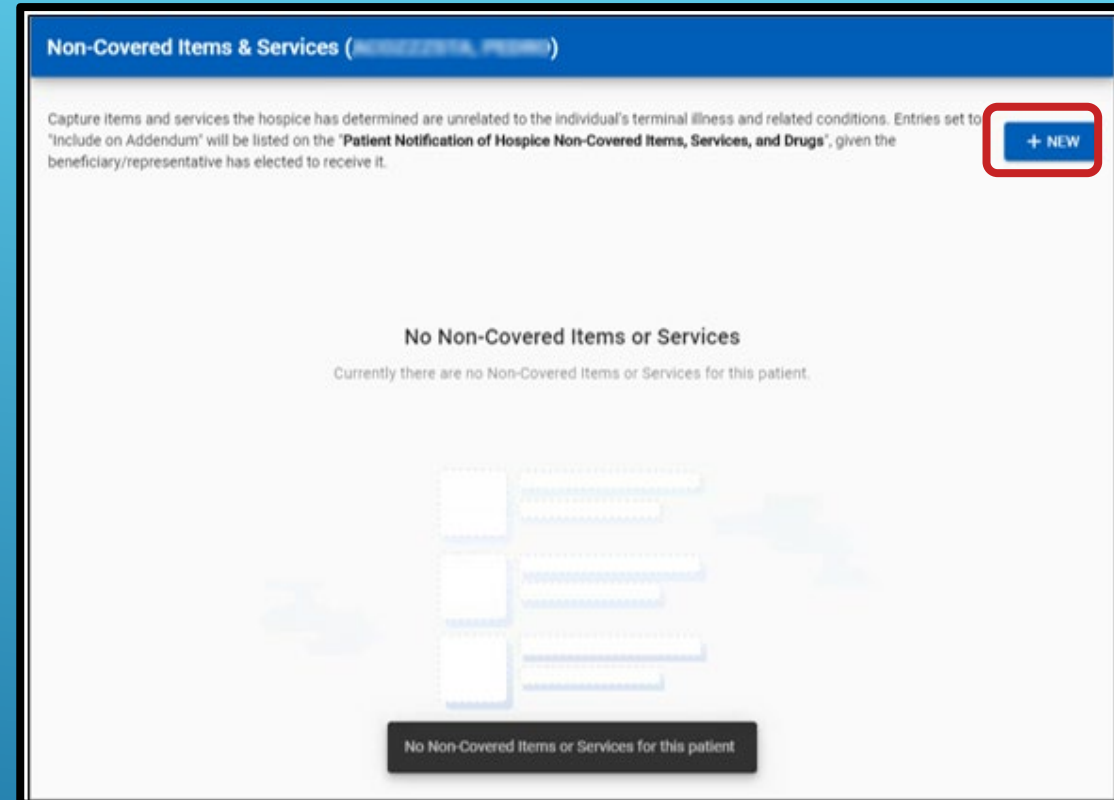
Add/Edit Non-Covered Items and Services

- Add Name text, select Item or Service Type, and add Reason for Non-Coverage text

Once all required fields are addressed, the SAVE button becomes available

- <u>Add/Edit Non-Covered Items and Services</u>

- Notification will be received that "Update saved." when changing "Include on Addendum"

- Keyboard focus allows users to tab (navigate) through the interactive fields on the screen

  - Pressing 'Spacebar' when "Include on Addendum" is focused will check/uncheck the selection box

Non-Covered Items & Services (*[redacted]* **)**

Capture items and services the hospice has determined are unrelated to the individual's terminal illness and related conditions. Entries set to "Include on Addendum" will be listed on the '**Patient Notification of Hospice Non-Covered Items, Services, and Drugs**', given the beneficiary/representative has elected to receive it.

+ NEW

Name	Type	Reason for Non-Coverage	Include on Addendum
Transportation	Service	Not related to hospice primary dx	☐

Update saved.

Focused

Name	Type	Reason for Non-Coverage	Include on Addendum
Transportation	Service	Not related to hospice primary dx	☐

Not Focused

Name	Type	Reason for Non-Coverage	Include on Addendum
Transportation	Service	Not related to hospice primary dx	☐

View Non-Covered Items and Services

Access Non-Covered Items and Services:

- Clinical Manager -> Medical Records Info -> Non-Covered Items/Services

- + NEW button and "Include on Addendum" selection boxes will be grayed out

Workflow

To alert back office team members when a beneficiary/representative has elected to receive the Election Statement Addendum, a new workflow stage has been added

- Event: Election Statement Addendum

- Stage: Send Requested Election Statement Addendum

Only one instance of this workflow will exist for the patient at a time and is generated upon the following conditions:

- Sync of a visit in which the Election Statement Addendum status in PointCare Demographics is updated to "Requested"

- A request is added manually via the Addendum Tracking Console with a status of Requested

- Any of the following changes take place for a patient whose current Election Statement Addendum status in PointCare Demographics is "Requested"

  - A new non-covered item or service is added for the patient

  - A new non-covered medication is added for the patient

- An existing record in the Addendum Tracking Console has the status edited to "Requested"

When all addendum tracking rows for the patient have a status other than "Requested", the workflow stage will be automatically closed
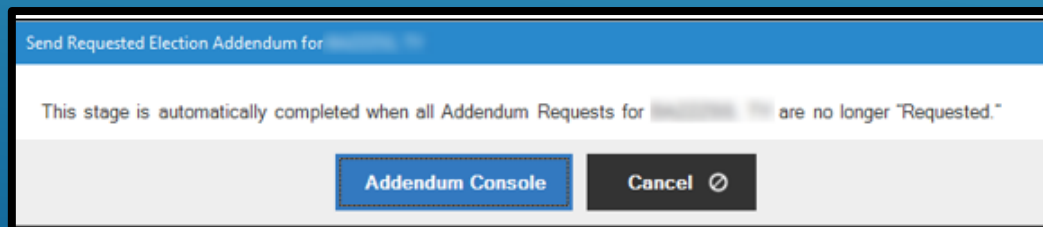
PRIOR TO PRINTING ADDENDUM FORMS:

LOOK FOR ANY HOSPICE ADDENDUM COORDINATION NOTES FOR THE PATIENT.

IF FOUND, ENTER THE NON COVERED ITEMS AND OR SERVICES FOUND IN THE COORDINATION NOTE, INTO THE NON COVERED ITEMS/SERVICES FIELD IN THE MEDICAL RECORD.

COMPLETING THIS PROCESS WILL ALLOW THE DATA TO FLOW TO THE PRINTED ADDENDUM FORM

Patient Notification of Hospice Non-Covered Items, Services, and Drugs Report

- A new report, accessible from the Addendum Tracking Console > View Addendum Report, has been created to provide written documentation and clinical explanation of the items, services, and drugs that the hospice deems non-covered

- The report is modeled off of the FY2021 CMS example of the Patient Notification of Hospice Non-Covered Items, Services, and Drugs and contains the following elements:

  - Header – Date of Request, Hospice Agency, Patient Name, MRN

  - Footer

  - Report Body

  - Right to Immediate Advocacy

  - Signature Information

<u>Patient Notification of Hospice Non-Covered Items, Services, and Drugs Report - Header</u>

The same header information will appear on all pages of the report

- Date of Request
  - Matches the "Request Date" present on an expanded row in the Addendum Tracking Console
- Hospice Agency
  - Populated with Branch Name
- Patient Name
- MRN

<u>Report Body</u>

Related /Unrelated Diagnosis

- **Populated with the related/unrelated diagnosis within the patient's referral at the time the report is ran**
- **Uses the full name or long description of the ICD-10 code**

Non-Covered Items, Services, Drugs

- **Populated with the non-covered items, services, and drugs (medications) at the time the report is run**

Non-Covered Items, Services, Drugs (continued)

    Grouped together by type – all items, then services, and then medications

- **Items and Services**: based on "Include on Addendum" being checked in the Non-Covered Items and Services screen

- **Medications**: designated as any medication(s) with a Financial Responsibility that is not "Provider"
    - Voided medications will show on the report
    - Discontinued/Ended medications will show IF the DC'ed/Ended Date is ON or AFTER the date the report is ran
    - Edits to existing medications will only be reflected on the report once the order is approved

Note: If there are no unrelated diagnosis or non-covered items, services, or drugs at the time the report is ran, the sections will appear with "No Unrelated Diagnoses" and/or "No Non-Covered Items, Services, or Drugs", respectively

Patient Notification of Hospice Non-Covered Items, Services, and Drugs Report

Right to Immediate Advocacy
- Includes CMS language and BFCC-QIO contact information for the addendum recipient

Signature Information
- This section will only appear on the final page of the report and is comprised of:
    - CMS language from the published report example that outlines signatures on the addendum form or its updates is only acknowledgement of receipt, and is not necessarily agreement with the hospice's determinations of non-coverage
    - Signature of Beneficiary/Representative: Individual that requested the addendum
    - Signature of Hospice Representative: Agency representative that provided a copy of the document to the requestor

Upcoming Enhancements:

Additional enhancements will be available prior to October 1, 2020 to generate the Election Statement Addendum workflow and request row when new non-covered items, services, or medications are added to the patient's record