

FY2021-ELECTION STATEMENT ADDENDUM

HCHB Enhancements

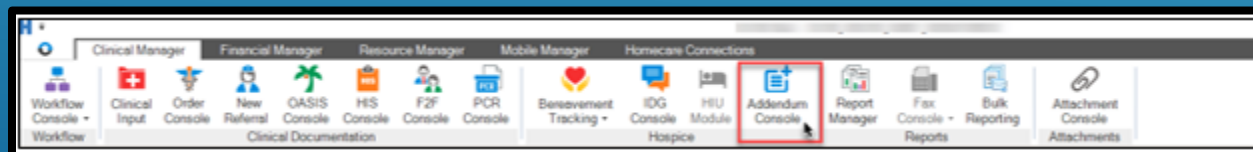


Addendum Tracking Console

- 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.

The screenshot shows the 'Addendum Tracking Console' interface. At the top, there is a blue header with the title and a search icon. Below the header, there is a button labeled '+ ADDENDUM REQUEST' with a circled '5' next to it. The main content is a table with five rows of addendum requests. Each row has columns for Patient Name, MR #, Branch, Due Date, and Status. The 'Due Date' and 'Status' columns are highlighted with circled numbers 1 and 2, respectively. A dropdown arrow is visible next to the 'Status' column, highlighted with a circled '3'. At the bottom of the table, there is a pagination control showing 'Items per page: 5' and '1 - 5 of 61', with a circled '6' next to it. Below the table, there is a legend explaining the highlighted elements.


Patient Name	MR #	Branch	Due Date	Status
ALZZZLEN, MARIO M	MD200004830102	MD2	06/05/2020	Signed
ARNZZZOLD, MARIAN	EU200004754902	EU2	06/05/2020	Signed
ALDRZZZIDGE, DAPHANE	BF200005149702	BF2	06/06/2020	Signed
TEZZZST, JOSE V	PY200003286902	PY2	06/07/2020	Signed
ALDRZZZIDGE, DAPHANE	BF200005149702	BF2	06/12/2020	Signed

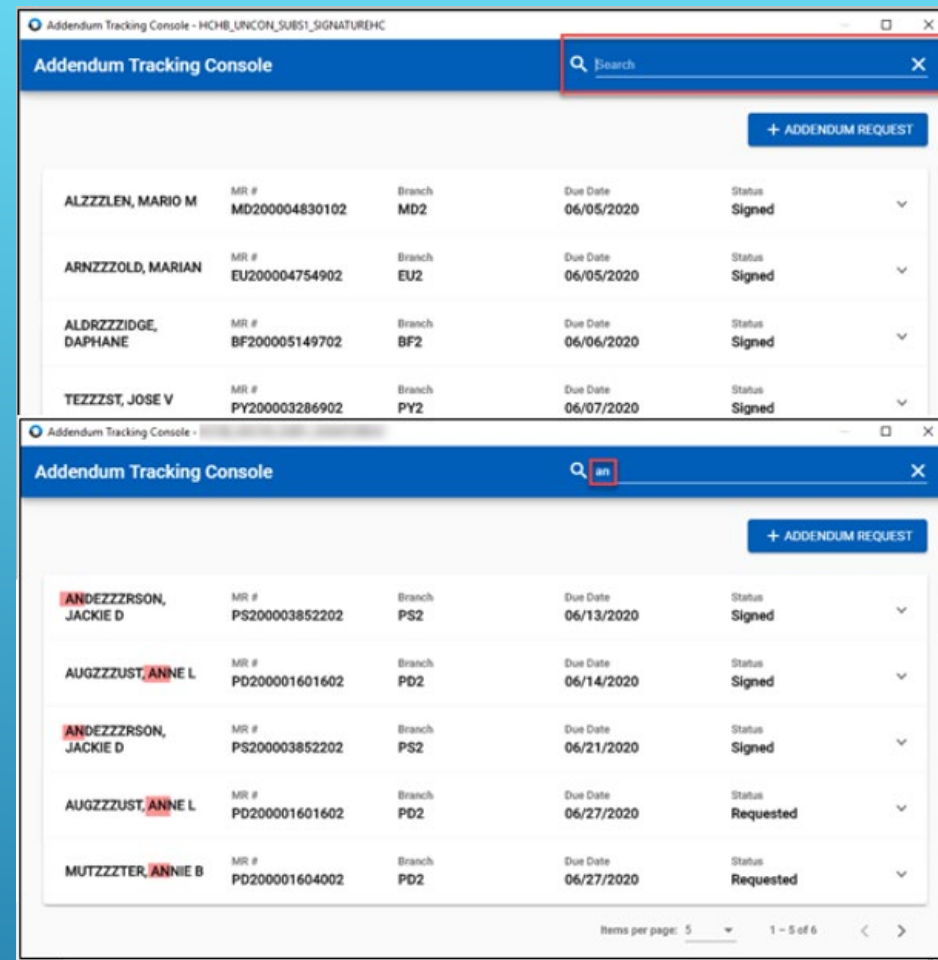
The Addendum Tracking Console displays all entered Addendum Requests sorted by Due Date then Patient Name with the most urgently due Addendum Requests listed first.

1. The Addendum Due Date is systematically calculated based on the date of the Addendum Request and the Addendum Type - Election or Subsequent
2. The most current status of the Addendum Request will be displayed
3. This control indicates there are Addendum Request Details available. Selecting the row will expand the Addendum Request to display details related to the Addendum Request including: Recipient Details, option to Edit the status of the Addendum Request, and to view the Addendum Report
4. Selecting the Search icon will expand to display a field to search for specific Addendum Request by Patient Name
5. Selecting the Add Addendum Request button will open the form to add an Addendum Request
6. These paging controls can be used to increase or decrease the number of Addendum Requests shown per page and to page forward or backward.



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



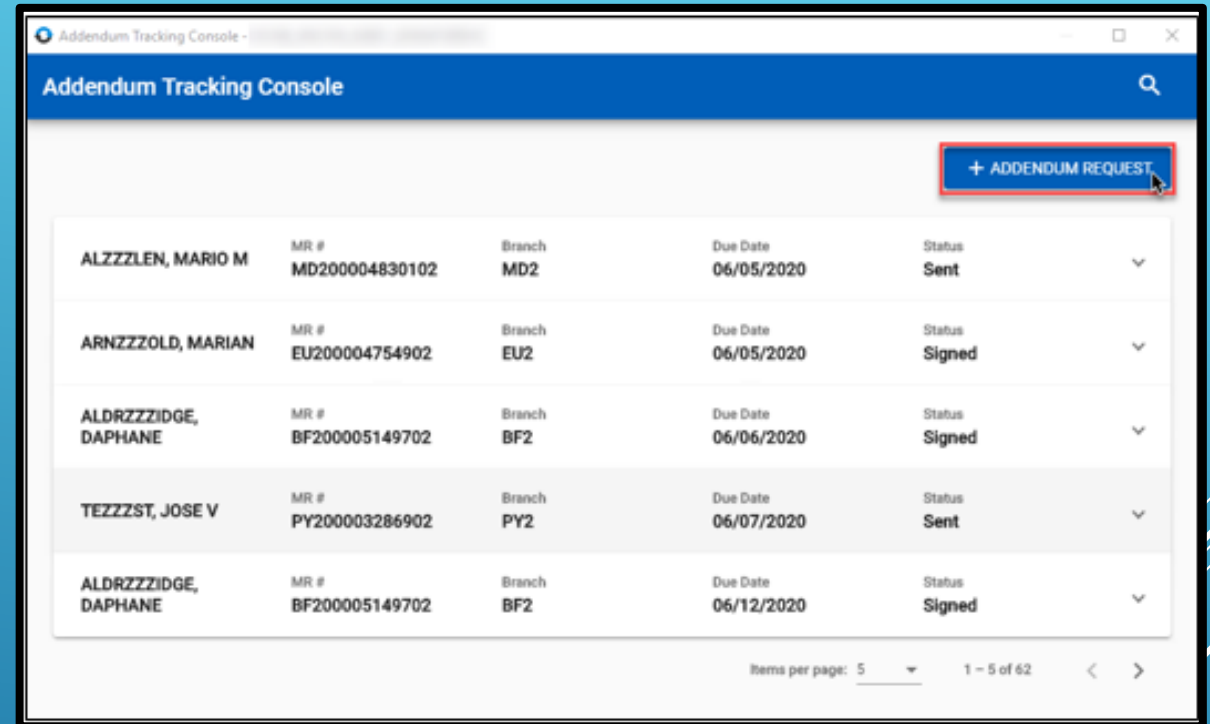
The image displays two screenshots of the Addendum Tracking Console interface. The top screenshot shows the search bar in the title bar with a magnifying glass icon and the word 'Search' next to it. Below the search bar, there is a table of Addendum Requests. The bottom screenshot shows the same interface after a search has been performed. The search bar now contains the text 'an'. The table below shows only the results that match the search criteria, with the first and last names of the patients highlighted in red.

MR #	Branch	Due Date	Status
MD200004830102	MD2	06/05/2020	Signed
EU200004754902	EU2	06/05/2020	Signed
BF200005149702	BF2	06/06/2020	Signed
PY200003286902	PY2	06/07/2020	Signed

MR #	Branch	Due Date	Status
PS200003852202	PS2	06/13/2020	Signed
PD200001601602	PD2	06/14/2020	Signed
PS200003852202	PS2	06/21/2020	Signed
PD200001601602	PD2	06/27/2020	Requested
PD200001604002	PD2	06/27/2020	Requested

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

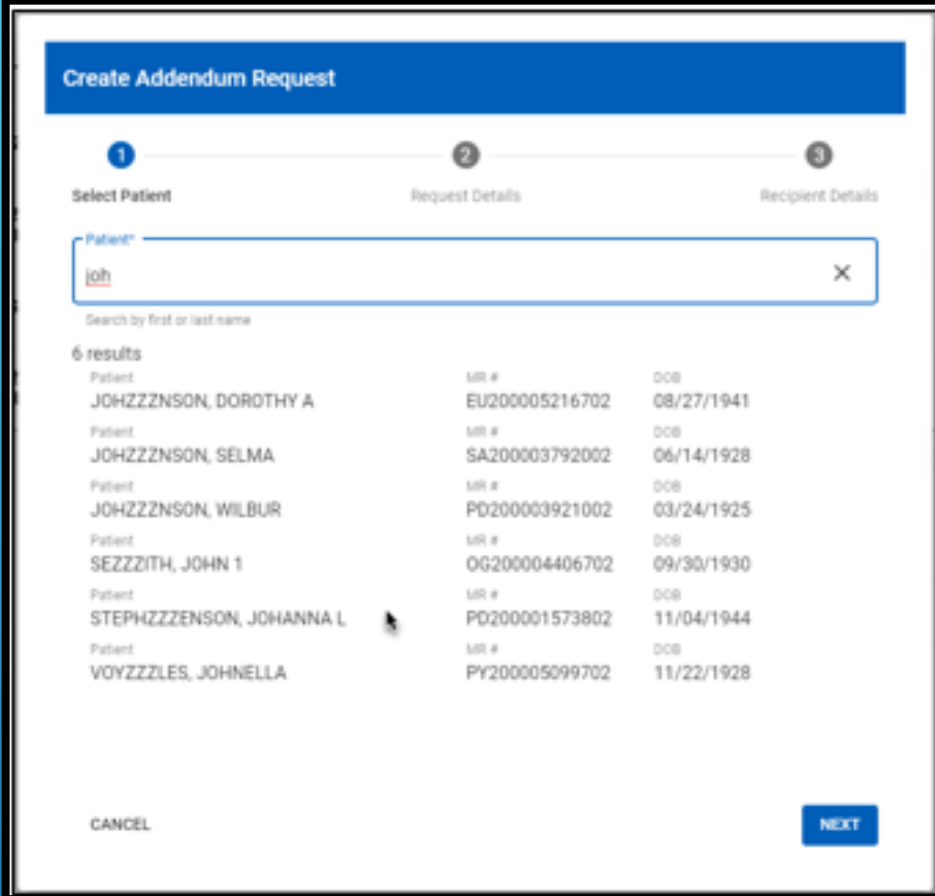


The screenshot displays the 'Addendum Tracking Console' interface. At the top right, there is a search icon and a blue button labeled '+ ADDENDUM REQUEST'. Below this is a table with five rows of addendum requests. Each row contains the name of the individual, their MR #, the Branch, the Due Date, and the Status. The status for each request is either 'Sent' or 'Signed'. At the bottom right of the table, there is a pagination control showing 'Items per page: 5' and '1 - 5 of 62'.

Name	MR #	Branch	Due Date	Status
ALZZZLEN, MARIO M	MD200004830102	MD2	06/05/2020	Sent
ARNZZZOLD, MARIAN	EU200004754902	EU2	06/05/2020	Signed
ALDRZZZIDGE, DAPHANE	BF200005149702	BF2	06/06/2020	Signed
TEZZZST, JOSE V	PY200003286902	PY2	06/07/2020	Sent
ALDRZZZIDGE, DAPHANE	BF200005149702	BF2	06/12/2020	Signed

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



Create Addendum Request

1 Select Patient 2 Request Details 3 Recipient Details

Patient: X

Search by first or last name

6 results

Patient	MR #	DOB
JOHZZZNSON, DOROTHY A	EU200005216702	08/27/1941
JOHZZZNSON, SELMA	SA200003792002	06/14/1928
JOHZZZNSON, WILBUR	PD200003921002	03/24/1925
SEZZZITH, JOHN 1	OG200004406702	09/30/1930
STEPHZZZNSON, JOHANNA L	PD200001573802	11/04/1944
VOYZZZLES, JOHNELLA	PY200005099702	11/22/1928

CANCEL NEXT

Patient Search

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

Create Addendum Request

1 Select Patient 2 Request Details 3 Recipient Details

Patient*

STEPHZZENSON, JOHANNA L ✕

Search by first or last name

6 results

Patient	MR #	DOB
JOHZZZNSON, DOROTHY A	EU200005216702	08/27/1941
Patient	MR #	DOB
JOHZZZNSON, SELMA	SA200003792002	06/14/1928
Patient	MR #	DOB
JOHZZZNSON, WILBUR	PD200003921002	03/24/1925
Patient	MR #	DOB
SEZZZITH, JOHN 1	OG200004406702	09/30/1930
Patient	MR #	DOB
STEPHZZENSON, JOHANNA L	PD200001573802	11/04/1944
Patient	MR #	DOB
VOYZZZLES, JOHNELLA	PY200005099702	11/22/1928

CANCEL NEXT

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

The screenshot shows a web form titled "Create Addendum Request" with a progress indicator showing three steps: "Select Patient" (completed), "Request Details" (current step), and "Recipient Details". The patient name is "STEPHZZZENZON, JOHANNA L". Three red boxes highlight the required fields: "Date*", "Status*", and "Type*". The "Date*" field is a text input with a calendar icon. The "Status*" field has two radio button options: "Requested" and "Sent". The "Type*" field has two radio button options: "Election" and "Update/Subsequent". At the bottom, there are "CANCEL", "BACK", and "NEXT" buttons.

Create Addendum Request

1 Select Patient 2 Request Details 3 Recipient Details

Patient
STEPHZZZENZON, JOHANNA L

Date*

Status*

Requested
 Sent

Type*

Election
 Update/Subsequent

CANCEL BACK NEXT

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

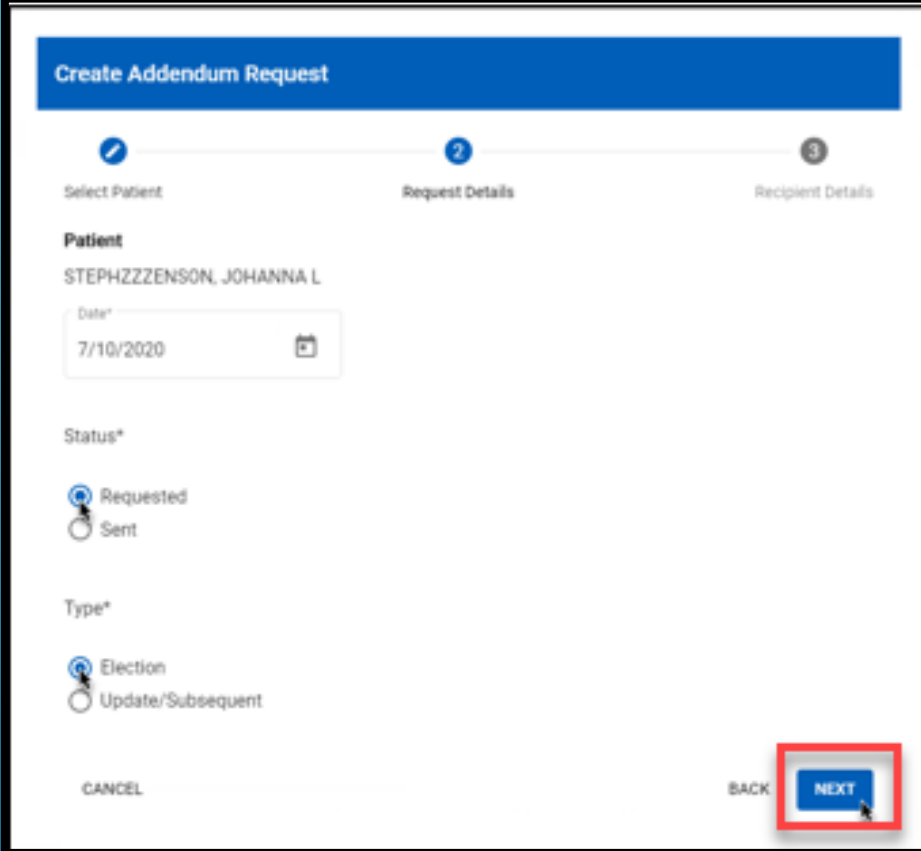
The image displays two screenshots of a web application interface for creating an addendum request. The top screenshot shows the 'Request Details' step of a three-step process. The patient name is 'STEPHZZENSON, JOHANNA L'. The 'Date*' field is highlighted with a red box. The 'Status*' field has two radio button options: 'Requested' and 'Sent', with 'Requested' selected. The 'Type*' field has two radio button options: 'Election' and 'Update/Subsequent', with 'Update/Subsequent' selected. A 'CANCEL' button is at the bottom. The bottom screenshot shows a date picker calendar for July 2020, with the 19th selected. The 'Date*' field is highlighted with a red box. The 'Status*' and 'Type*' fields are also visible. A 'CANCEL' button is at the bottom left, and 'BACK' and 'NEXT' buttons are at the bottom right.

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



The screenshot displays a web form titled "Create Addendum Request" with a progress indicator showing three steps: 1. Select Patient, 2. Request Details (current step), and 3. Recipient Details. The form contains the following fields and options:

- Patient:** STEPHZZZENSON, JOHANNA L
- Date:** 7/10/2020 (with a calendar icon)
- Status*:** Radio buttons for "Requested" (selected) and "Sent".
- Type*:** Radio buttons for "Election" (selected) and "Update/Subsequent".
- Navigation:** "CANCEL" button on the left and "BACK" and "NEXT" buttons on the right. The "NEXT" button is highlighted with a red box.

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

Create Addendum Request

Progress: 1. Select Patient (✓), 2. Request Details (✓), 3. Recipient Details (3)

Patient
STEPHZZZENZON,
JOHANNA L.

Preferred Delivery Method*

Requested By*

Phone* Email

Address 1*

ZIP* City* State*

CANCEL BACK DONE

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

The screenshot displays the 'Create Addendum Request' form. At the top, there is a blue header with the title 'Create Addendum Request'. Below the header, a progress indicator shows three steps: 'Select Patient' (completed), 'Request Details' (current step), and 'Recipient Details' (pending). The patient information is listed as 'STEPHZZENSON, JOHANNA L.'. A dropdown menu for 'Preferred Delivery Method' is open, showing two options: 'In Person' and 'Email'. The 'In Person' option is highlighted with a red border. Below the dropdown, there is a 'Requested By*' dropdown menu. Further down, there are input fields for 'Phone*', 'Email', and 'Address 1*'. At the bottom, there are input fields for 'ZIP*', 'City*', and 'State*'. The form concludes with 'CANCEL', 'BACK', and 'DONE' buttons.

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

The screenshot displays a web form titled "Create Addendum Request" with a progress indicator showing three steps: "Select Patient", "Request Details", and "Recipient Details". The "Select Patient" step is active. The form contains the following fields:

- Patient:** STEPHZZENSON, JOHANNA L
- Preferred Delivery Method*:** In Person
- Requested By*:** A dropdown menu is open, showing three options: "Patient", "Existing Contact", and "Existing Contact". The "Patient" option is highlighted.
- Email:** A text input field.
- Address:** A text input field.
- ZIP*:** A text input field.
- City*:** A dropdown menu.
- State*:** A dropdown menu.

At the bottom of the form, there are three buttons: "CANCEL", "BACK", and "DONE".

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*

The screenshot displays the 'Create Addendum Request' form. At the top, there is a blue header with the title 'Create Addendum Request'. Below the header, a progress bar shows three steps: 'Select Patient' (completed), 'Request Details' (current step), and 'Recipient Details' (pending). The form fields are as follows:

- Patient:** STEPHZZZENZON, JOHANNA L
- Preferred Delivery Method*:** In Person
- Requested By*:** A dropdown menu is open, showing three options: 'Patient', 'Existing Contact', and 'LAWZZZSON, PATRICE'. The 'Patient' option is selected.
- Phone*:** (111)111-1111
- Email:** (empty)
- Address 1*:** 123 MAIN ST.
- ZIP*:** 97038-7601
- City*:** MOLALLA
- State*:** OR

A 'CANCEL' button is located at the bottom left of the form.

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

Create Addendum Request

Select Patient Request Details Recipient Details

Patient
STEPHZZZENZON,
JOHANNA L.

Preferred Delivery Method*
Email

Requested By*
Patient

Phone*
(111)111-1111

Email*
Required

Address 1
123 MAIN ST.

ZIP
97008-7601

City
MOLALLA

State
OR

CANCEL BACK DONE

STEPHZZZENZON,
JOHANNA L.

Preferred Delivery Method*
In Person

Requested By*
HOZZZLT, ALAN

Phone*
(111)111-1111

Email

Address 1*
Required

ZIP
12345

City*
Required

State*
NY

CANCEL BACK DONE

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

Discard Request?

By selecting Discard, your progress will be lost.

CANCEL DISCARD

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

The screenshot shows a three-step process for creating an addendum request. Step 1, 'Select Patient', is complete. Step 2, 'Request Details', is also complete. Step 3, 'Recipient Details', is the current step. The form contains the following fields:

- Patient:** LOZZZE, MARIANO
- Preferred Delivery Method:** In Person
- Requested By:** AYZZZERS, QUINCY
- Phone:** (606)879-5451
- Email:** Qayers@yahoo.com
- Address 1:** 1234 MAIN ST, Apt A
- Zip:** 39145
- City:** PELAHATCHIE
- State:** MS

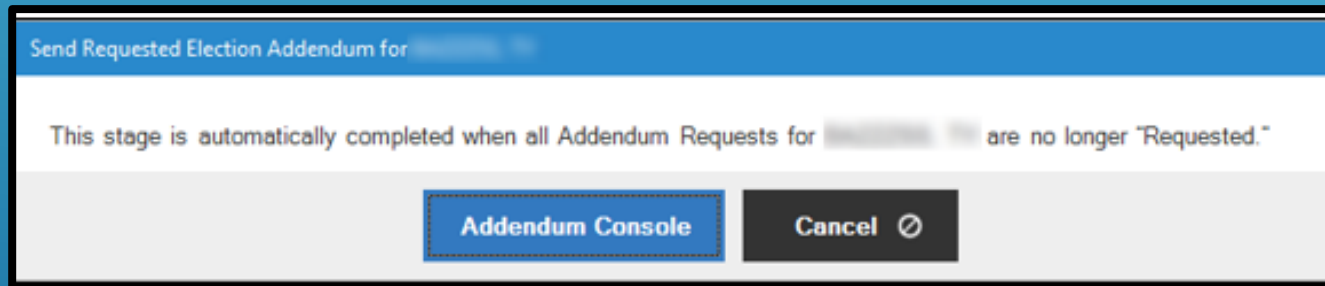
At the bottom, there are three buttons: 'CANCEL', 'BACK' (highlighted with a red box), and 'DONE'.

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

Addendum Tracking Console

[+ ADDENDUM REQUEST](#)

Request Name	MR #	Branch	Due Date	Status
HOWZZARD, TOMMY L	PS200004378202	PS2	06/12/2020	Signed
BAZZZKER, MARI R	EU200004891902	EU2	06/13/2020	Requested
ANDEZZRSON, JACKIE D	PS200003852202	PS2	06/13/2020	Signed
ALDRZZZIDGE, DAPHANE	BF200005149702	BF2	06/14/2020	Requested
AUGZZZUST, ANNE L	PD200001601602	PD2	06/14/2020	Signed

Expanded View for BAZZZKER, MARI R

Request Date: 06/10/2020 (1)

Request Type: Update/Subsequent (2)

Delivery Method: In Person (3)

Recipient Details (4):
MARI BAZZZKER
123 MAIN ST.
COTTAGE GROVE, OR 97424
(111)111-1111

Notes (5): -

[VIEW ADDENDUM REPORT](#) (6) [EDIT STATUS](#) (7)

Items per page: 5 | 6 - 10 of 62

1. This date field will show the date of the request until a Signed Date is entered via Edit Status. Once a signed date is entered that date will be shown here.
2.
3. } Request Type, Delivery Method, and Recipient Details entered on the Addendum Request in PointCare or from within the Addendum Tracking Console
4.
5. Notes entered as part of Edit Status.
6. Selecting View Addendum Report will open a view of the Patient Notification of Hospice Non-Covered Items, Services, and Drugs Report.
7. Selecting Edit Status will open a form to edit the status of the Addendum Request and enter Notes as needed.

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:

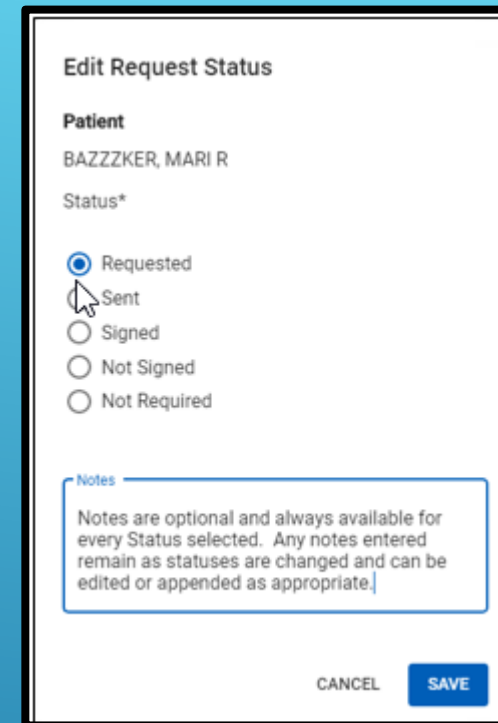
- Displays the current status of the Addendum Request
- All status options are always available

Notes:

- Always available and depending on status selected may or may not be required

Signed:

Date field will be visible and required



Edit Request Status

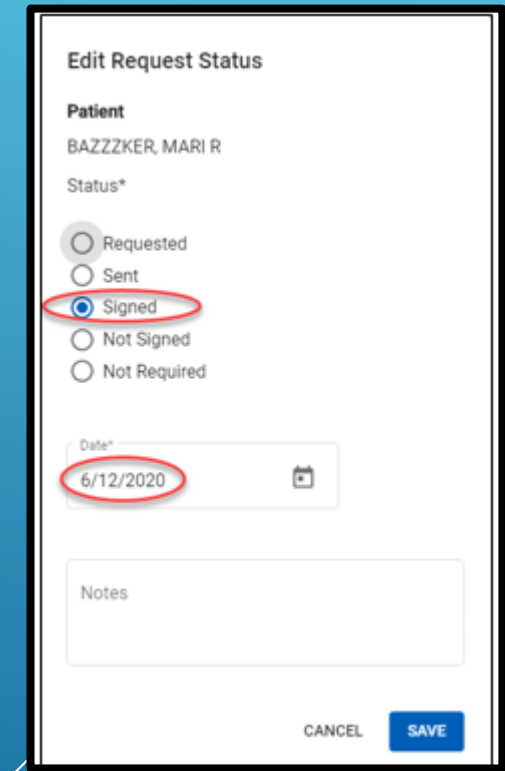
Patient
BAZZZKER, MARI R

Status*

Requested
 Sent
 Signed
 Not Signed
 Not Required

Notes
Notes are optional and always available for every Status selected. Any notes entered remain as statuses are changed and can be edited or appended as appropriate.

CANCEL SAVE



Edit Request Status

Patient
BAZZZKER, MARI R

Status*

Requested
 Sent
 Signed
 Not Signed
 Not Required

Date*
6/12/2020

Notes

CANCEL SAVE

- Edit Requested Status
- Not Signed/Not Required:
 - Requires Notes

Edit Request Status

Patient
BAZZKER, MARI R

Status*

Requested
 Sent
 Signed
 Not Signed
 Not Required

Notes*

CANCEL SAVE

Edit Request Status

Patient
BAZZKER, MARI R

Status*

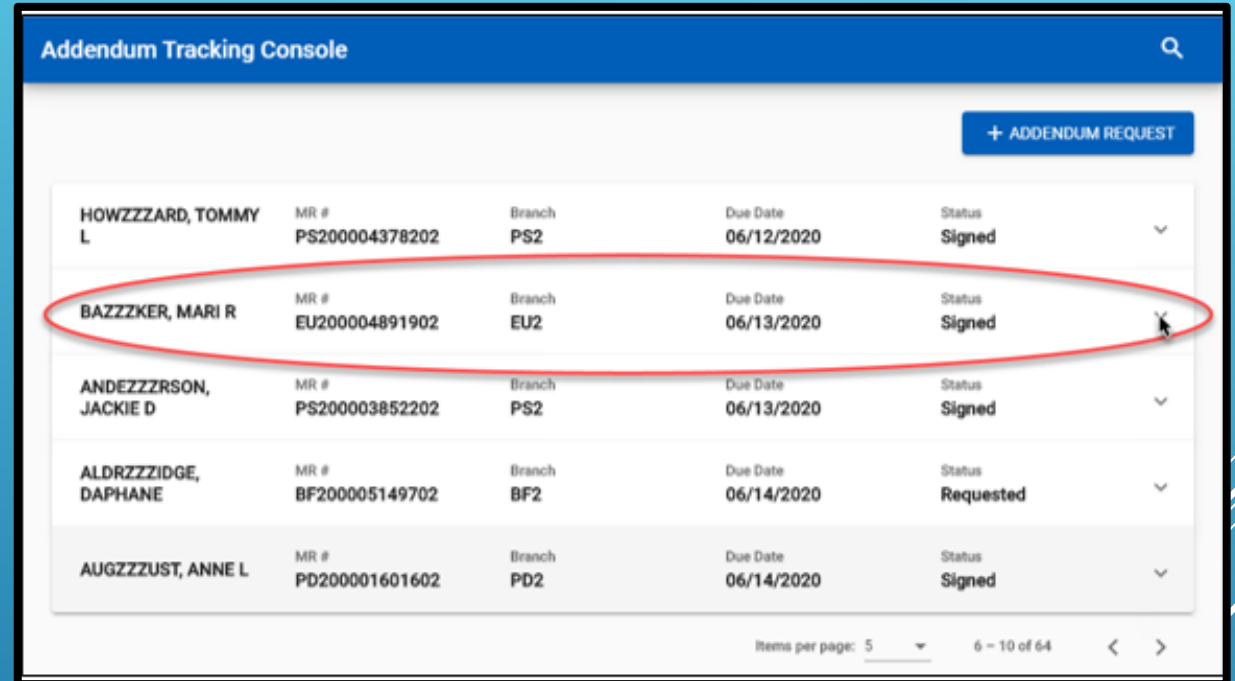
Requested
 Sent
 Signed
 Not Signed
 Not Required

Notes*
Patient refused to sign

CANCEL SAVE

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



The screenshot displays the 'Addendum Tracking Console' interface. At the top right, there is a search icon and a '+ ADDENDUM REQUEST' button. Below this is a table with five rows of addendum requests. The second row, for 'BAZZZKER, MARI R', is circled in red. The table columns are: Patient Name, MR #, Branch, Due Date, and Status. At the bottom right, there is a pagination control showing 'Items per page: 5' and '6 - 10 of 64'.

Patient Name	MR #	Branch	Due Date	Status
HOWZZZARD, TOMMY L	PS200004378202	PS2	06/12/2020	Signed
BAZZZKER, MARI R	EU200004891902	EU2	06/13/2020	Signed
ANDEZZZRRSON, JACKIE D	PS200003852202	PS2	06/13/2020	Signed
ALDRZZZIDGE, DAPHANE	BF200005149702	BF2	06/14/2020	Requested
AUGZZZUST, ANNE L	PD200001601602	PD2	06/14/2020	Signed

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

The screenshot displays the 'Addendum Tracking Console' interface. At the top, there is a search bar with the text 'bazzz' and a close button. A blue button labeled '+ ADDENDUM REQUEST' is located in the top right corner. The main content area shows a table with the following data:

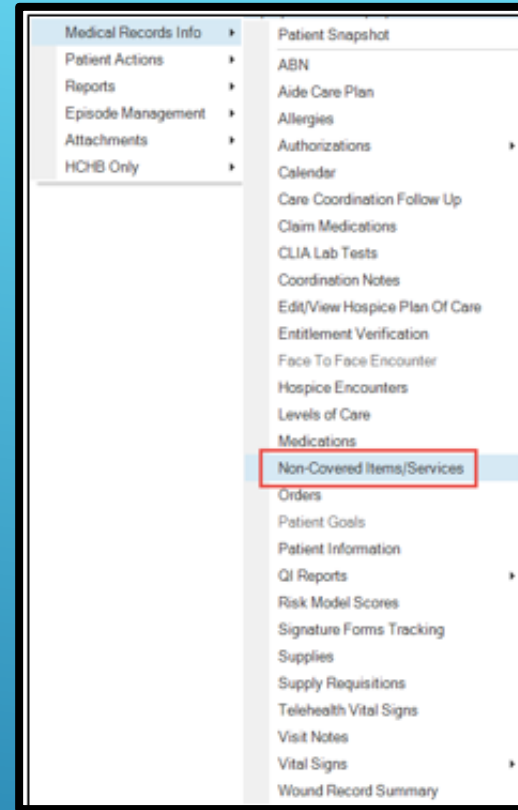
BAZZZKER, MARI R	MR # EU200004891902	Branch EU2	Due Date 06/13/2020	Status Signed
Signed Date 06/13/2020	Request Type Update/Subsequent	Delivery Method In Person	Recipient Details MARI BAZZZKER 123 MAIN ST. COTTAGE GROVE, OR 97424 (111)111-1111	

Below the table, there is a 'Notes' section with the text: 'Notes are always available for every Status selected. Any notes entered remain as statuses are changed and can be edited or appended as appropriate.'

At the bottom right, there are two buttons: 'VIEW ADDENDUM REPORT' and 'EDIT STATUS'. The footer shows 'Items per page: 5' and '1 - 1 of 1'.

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

A screenshot of a form field labeled 'Reason for Non-Coverage*'. The field is empty and has a character counter '0/500' in the bottom right corner.A screenshot of a form field labeled 'Name*'. The field is empty and has a character counter '0/100' in the bottom right corner.

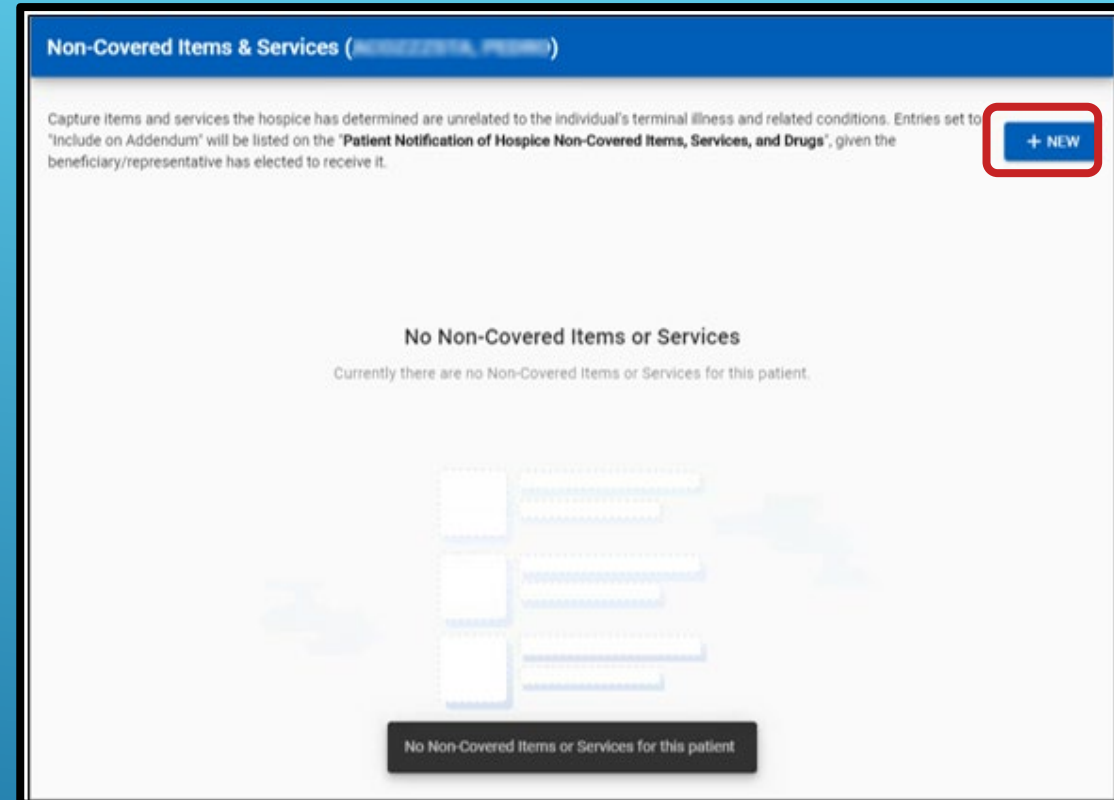
The Basics – Non-Covered Items/Services

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

The image displays two screenshots of a web application interface for adding non-covered items or services. The background is a greyed-out view of the 'Non-Covered Items & Services' page, which includes a '+ NEW' button and a descriptive paragraph about hospice coverage. The foreground shows a modal form titled 'Add New Non-Covered Item or Service'.
The top screenshot shows the form with the following fields:

- Name*: An empty text input field with a character count of 0/100.
- Type*: Radio buttons for 'Item' and 'Service', both unselected.
- Reason for Non-Coverage*: An empty text input field.

The bottom screenshot shows the form after data entry:

- Name*: 'Transportation' (14/100).
- Type*: 'Service' is selected.
- Reason for Non-Coverage*: 'Not related to hospice primary dx' (33/500).
- Buttons: 'CANCEL' and 'SAVE' (highlighted with a red box).

- Add/Edit Non-Covered Items and Services
- 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 (HORIZON, 07/14/14)

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	<input type="checkbox"/>

Update saved.

Focused

Name	Type	Reason for Non-Coverage	Include on Addendum
Transportation	Service	Not related to hospice primary dx	<input type="checkbox"/>

Not Focused

Name	Type	Reason for Non-Coverage	Include on Addendum
Transportation	Service	Not related to hospice primary dx	<input type="checkbox"/>

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

Name	Type	Reason for Non-Coverage	Include on Addendum
Service (blurred)	Service	blurred	<input checked="" type="checkbox"/>
Item (blurred)	Item	blurred	<input type="checkbox"/>
Service (blurred)	Service	blurred	<input checked="" type="checkbox"/>
Item (blurred)	Item	blurred	<input checked="" type="checkbox"/>
Service (blurred)	Service	blurred	<input checked="" type="checkbox"/>
Item (blurred)	Item	blurred	<input checked="" type="checkbox"/>
Item (blurred)	Item	blurred	<input checked="" type="checkbox"/>

Workflow

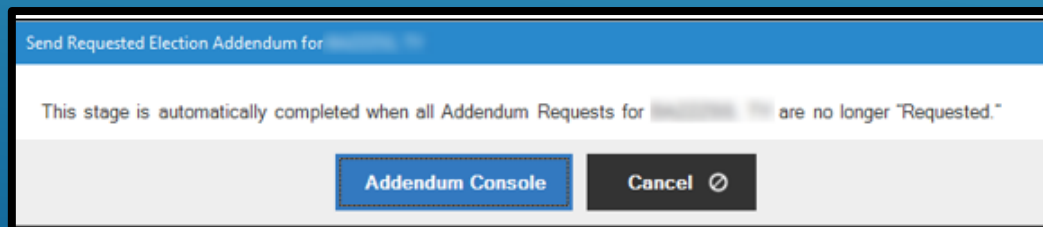
To alert back office team members when a beneficiary/representative has elected to receive the Election Statement Addendum, a new workflow stage has been added

- 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

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

Date of Request: _____ **Hospice Agency:** _____
Patient Name: _____ **MRN:** _____

Diagnoses Related to Terminal Illness and Related Conditions (hospice is responsible to cover all items, services and drugs):

HEART FAILURE, UNSPECIFIED _____
 CHRONIC KIDNEY DISEASE, UNSPECIFIED _____
 ANEMIA, UNSPECIFIED _____
 ANXIETY DISORDER, UNSPECIFIED _____
 UNSPECIFIED OSTEOARTHRITIS, UNSPECIFIED SITE _____
 OTHER CHRONIC PAIN _____
 BRADYCARDIA, UNSPECIFIED _____

Diagnoses Unrelated to Terminal Illness and Related Conditions:

No Unrelated Diagnoses _____

Non-covered items, services, and drugs determined by hospice as not related to my terminal illness and related conditions:

Items/Services/Drugs	Reason for Non-Coverage
No Non-Covered Items, Services, or Drugs	

Note: The hospice makes the decision as to whether or not conditions, items, services, and drugs are related for each beneficiary. This addendum should be shared with other healthcare providers from which you seek items, services, or drugs, unrelated to your terminal illness and related conditions to assist in making treatment decisions.

Right to Immediate Advocacy
 As a Medicare beneficiary you have the right to appeal the decision of the hospice agency on items not being covered because the hospice has determined they are unrelated to the individual's terminal illness and related conditions. You have the right to contact the Medicare Beneficiary and Family Centered Care-Quality Improvement Organization (BFCC-QIO) for immediate assistance.

Visit this website to find the BFCC-QIO for your area. <https://qioprogram.org/contact-zones> or call 1-800-MEDICARE (1-800-633-4227). TTY users can call 1-877-486-2048.

Acknowledgement of non-covered items, services, and drugs not related to my terminal illness and related conditions
 The purpose of this addendum is to notify the beneficiary (or representative), in writing, of those conditions, items, services, and drugs the hospice will not be covering because the hospice has determined they are unrelated to the individual's terminal illness and related conditions. I acknowledge that I have been given a full explanation and have an understanding of the list of items, services and drugs not related to my terminal illness and related conditions not being covered by hospice. Signing this addendum (or its updates) is only acknowledgement of receipt of this addendum (or its updates) and not necessarily agreement with the hospice's determinations.

Beneficiary is unable to sign - Reason: _____

Signature of Beneficiary/Representative **Date Signed**

Signature of Hospice Representative **Date Signed**

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

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

Report Body

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**

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

Date of Request: [REDACTED] Hospice Agency: [REDACTED]
Patient Name: [REDACTED] MRN: [REDACTED]

MR #	Branch	Due Date	Status
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Request Date	Request Type	Delivery Method	Recipient Details
07/13/2020	[REDACTED]	[REDACTED]	[REDACTED]

Notes

[REDACTED]

[VIEW ADDENDUM REPORT](#) [EDIT STATUS](#)

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-QID 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