

To Create a RECERT & Generate a RECERT REPORT

TO CREATE THE RECERT (to put the content in the report):

Find the patient, then click Documentation and Add Note

Select your case (ST, OT, or PT) if not already selected

Choose Visit Type: **Plan of Care Update**

Sub Type: **Re-Evaluation Note**

Leave everything else the same, and click Create Note on the top right

O: INTERVENTIONS > INTERVENTION > NOTES tab – (1) – delete the service time if this is a recert only (no treatment visit) (2) – make sure that you have already added the Discharge Criteria

A: EVALUATION tab : ASSESSMENT tab – type your assessment statement as you normally would on your paper note. E.g., progress made over the last recert period, and **ALWAYS END** the Assessment statement with “**Skilled ST/OT/PT services are Required to WHAT & WHY**”

P: TREATMENT PLAN tab – (1) – change the POC dates to reflect the **next / future 90 day PA / POC** period for which you are asking for authorization (i.e., what you want your next PA to be – the start date should be the day after your current PA ends, the end date should be 3 months from the start date, or 12 months for MPW clients)

e.g., if POC / PA ends on 2-12-18, new POC should start on 2-13-18

(Revflow should automatically compute the next 90 day period for you, once you enter the start date and hit tab)

(2) – at the very bottom, in the Comments box, add Discharge Plans

*** CHARGE CAPTURE tab** – *** VERY IMPORTANT *** – **PUT A ZERO (0) in the UNITS box(es) in the Charge Validation tab if you have not also seen the client for treatment on this date.**

You can bill for any treatment provided this date, but not any re-eval codes.

OTs & PTs – see Exceptions below

WHILE IN CHARGE CAPTURE TAB – to Sign note when you are done – **MAKE SURE THE UNITS ARE ZERO (0) FOR EVERY CODE ON THIS SCREEN** – then click the **Validate Charges**

button. You should see the pop up to enable you to sign the note.

*** Continue to the next page to send the recert to the MD (required).**

Exceptions: – *clients with Medicare AS PRIMARY – OT & PT can only bill for a re-eval for clients who bill Medicare as primary. And - ONLY if there is a SIGNIFICANT change in the plan of care (e.g., a major fall, another stroke, etc). Do not bill for a re-eval unless there has been a major change in the plan of care and without verifying primary payer source with PIC.*

TO GENERATE THE RECERT REPORT (which will have a signature line for the MD to sign):

After you sign the note, click **OUTPUT REPORTS tab** on the top right

you will see a white drop down that says "please select a report"

click on the "please select a report" and choose "**NON-medicare POC certification detail**"

(DO NOT CHOOSE MediCARE unless you have a MediCARE patient)

then hit "new"

hit finalize at the bottom of the report (or edit if you want to make any changes first)

you should see your report in the list

click on it one time to highlight it, then click Fax Selected

you can normally just hit "send to fax queue" - don't add or change anything (unless you are at Active

Day – please see the instructions below for Active Day clients, as they are a little different)

This will fax your recert report to the MD.

After this is added to the Queue, you are done with your recert! 😊

PLEASE NOTE : we want our recert reports to “double” as MD orders, so that you do not have to fill out separate MD orders on paper. **PLEASE let me know if you do not see an “ORDER” on the top right of your FINALIZED recert report BEFORE you send to the MD, so I can fix it.** (it should say, for example: “ORDER: OT Treatment” for straight Medicaid clients, “ORDER: ST 5u/wk for 12mo” for MPW clients, or “ORDER: PT 5v/mo for 6 mo” for EPSDT clients”). This “order” should also match what your paper orders would have normally said. PLEASE let me know if the “ORDER” on the finalized recert report is missing or incorrect. Let me know if any questions!!! Thank you so much!!!

ACTIVE DAY – RECERT – ADDITIONAL INSTRUCTIONS

After you click Fax Selected :

REFERRAL SOURCE - PLEASE add Active Day ___) in as a REFERRAL SOURCE (start typing AD Watterson or Hikes or Bardstown or wherever, in the referring source line), so that it will send to them too.

In the **MESSAGE – PLEASE CHANGE the FAX number to Active Day’s, so that the signed recert will come back to Active Day, instead of PIC.

hit "send to fax queue"

This will fax your recert report to the MD (required) and to Active Day.

After this is added to the Queue, you are done with your recert! 😊