

Pre Claim Review Subsequent Episode Checklist		
Task #1: Face-to-Face (F2F) Clinical Encounter Notes. If face-to-face was performed by someone other than the certifying physician, a statement of collaboration/agreement needs to be included or document should be signed off by the certifying physician.		
Documentation	Included	N/A
F2F (Physician-generated) Encounter Note		
Discharge Summary if Coming from Facility		
Office Visit Note if Coming from Outpatient		
Task #2: Home Health Agency (HHA)-generated records that support the F2F encounter and that have been signed, dated and incorporated into the certifying physician's medical records (if applicable). *These items only need a physician signature if you want them included as part of the face-to-face documentation.		
Documentation	Included	N/A
F2F Form from the HHA Sent to the Physician (Not Required)		
Plan of Care (POC) Certification Orders		
*Comprehensive Assessment		
*Physical Therapy Evaluation		
*Occupational Therapy Evaluation		
*Speech Language Pathology Evaluation		
*Recertification (60-day) Summary		
*Visit Note by the HHA Staff		
Task #3: POC Signed and Dated by the Certifying Physician.		
Documentation	Included	N/A
Initial POC/Certification		
POC for Current Episode		
Task #4: Signed and Dated Physician's Certification.		
Documentation	Included	N/A
Certification		
Task #5, Q6: Documentation to meet criteria 2, component 1 — which supports the patient's normal inability to leave the home.		
Task #5, Q7: Documentation that meets criteria 2, component 2 — which supports that it is a considerable and taxing effort for the patient to leave the home (all items may not be applicable). These items in Task #5 do not need to be signed by the certifying physician.		
Documentation	Included	N/A
Comprehensive Assessment		
Initial Physical Therapy Evaluation		
Initial Occupational Therapy Evaluation		
Initial Speech Language Pathology Evaluation		
Current Physical Therapy Assessment		
Current Occupational Therapy Assessment		
Current Speech Language Pathology Assessment		
Nursing Visit Notes		
Physical Therapy Visit Notes		
Occupational Therapy Visit Notes		
Speech Language Pathology Visit Notes		