

Medicare Plan of Care Certification Period Process

Per Medicare regulations, each of your Medicare patients must have a Medicare Plan of Care created and certified by the patient's physician. This document will provide step by step instructions on how to complete this process within OptimisPT.

Creating the Initial Medicare Plan of Care Certification Period (MPOC):

You will find the *Medicare Plan of Care Certification Period* within the "Goals Section" of the visit template when your patient is Medicare.

It will be located below the regular *Plan of Care Duration* section.

The initial MPOC will auto populate within the Initial Evaluation Visit once you have created your Goals. Per compliance, the start date will default to the date of the Initial Visit. The end date will default to the length of the longest functional goal calculated in days, not to exceed 90 days.

Goals 2.0				Goal Templates	Goal Builder
Body Region	Activity Limitation	Dates	Goal		
≡ Low Back and Abdomen	Lifting medium-weight objects	Start: 02/11/2019 End: 04/07/2019	Low back pain will improve to be able to bend below the waist and lift 20lbs intermittently for 4 hours daily for occupational activities; Time frame: 8 weeks.	Edit Delete Archive	Archive Next Visit
≡ Low Back and Abdomen	Sitting (capacity)	Start: 02/11/2019 End: 03/24/2019	LBP and strength will improve to perform prolonged sitting for 4 hours daily at a desk or table for occupational or household activities; Time frame: 6 weeks.	Edit Delete Archive	Archive Next Visit

Plan of Care Duration:

begins on Feb 11, 2019 for 8 weeks which expires on Apr 07, 2019 [Edit](#)

Medicare Plan of Care Certification Periods: [add](#)

Current:

begins on Feb 11, 2019 for 56 days which expires on Apr 07, 2019 [Edit](#) [Remove](#) [certify](#)

When you have completed your documentation for the Initial Evaluation visit, you will create a *Plan of Care Certification* document as one of your reports within the "Document Visit Section".

This document will be one page in length, will contain all the information Medicare requires the physician to sign off on and will contain a Physician Signature Box.

Create Patient Report

Choose Report Type _____

Note: The content of the "Consultation" report is not available for this report type.

- Initial Evaluation
- Consultation
- Plan of Care Certification**
- Treatment Note
- Progress Report
- Re-evaluation
- Discharge Report

- Summary Initial Evaluation
- Summary Progress Report

Once created, you can fax this document directly to the physician by checking the box next to the document, clicking on the  button and then clicking .

Document Visit					Fax	New Patient Document	?
Report Type	Report Date	Document Link	Cosign		Delete Document		
<input type="checkbox"/> Initial Evaluation	02/01/2019 11:42AM	rpt_Feb_01_1142_24_Edward_Sheetz.pdf (Add Signature)	Select Resource	Enter cosign note			
<input checked="" type="checkbox"/> Plan of Care Certification	02/01/2019 11:42AM	rpt_Feb_01_1142_28_Edward_Sheetz.pdf (Add Signature)	Select Resource	Enter cosign note			

Certifying the Medicare Plan of Care Certification Period:

If the physician agrees with the Plan of Care that was established by the therapist, they should sign and date the *Plan of Care Certification* document and return it to the therapist.

Per Medicare Regulations, the MPOC Cert Period must be signed by the physician within 30 days of it being created.

When the certified MPOC is received back from the physician, the document should be uploaded into the patient's OptimisPT Episode of Care chart and included under the "Documents" section.

Documents & Attachments

Attachments

[Download Vertical Flowsheet](#)[Download Documents](#)[Document Non-Visit](#)[+ Add Attachment](#)

File	Type	Owner	Description	Date Created	Actions
<input type="checkbox"/> MPOC.Certification.pdf	Other	Jennifer Heiligman	Signed MPOC	03/20/2019 10:50AM PDT	Edit Delete

The MPOC Certification Period should also be marked as **“Certified”** within Optimis. We highly recommend using this process as it will help you maintain compliance.

This process can be completed by the Administrative Staff or by the Therapist. There are two places within OptimisPT that the MPOC can be certified. You need only certify it in one of these locations.

The *first* is located at the bottom of the “Documents” Section of the Episode of Care Chart.

Medicare Plan of Care Certification Periods

Current

Begins on **Feb 11, 2019** for **56 days** which expires on **Apr 07, 2019** [Certify](#)

The *second* is located in the “Goals” Section of the patient’s visit.

Medicare Plan of Care Certification Periods: [add](#)

Current:

begins on **Feb 11, 2019** for **56 days** which expires on **Apr 07, 2019** [Edit](#) [Remove](#) [certify](#)

In order to mark the MPOC as certified within Optimis, click on the word “Certify” next to the date range and enter the date the physician signed the *Plan of Care Certification* document then click “Submit”.

Medicare Plan of Care Certification Periods: [add](#)

Current:

begins on **Feb 11, 2019** for **56 days** which expires on **Apr 07, 2019** [Edit](#) [Remove](#) [certify](#)

Certify on:

[Cancel](#)

Creating Subsequent Medicare Plan of Care Certification Periods:

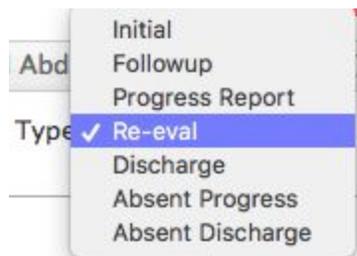
When the current MPOC Certification Period is about to expire or has expired or there is a change in condition, you will need to create a new MPOC Cert Period if you wish to continue treating your Medicare patient.

In order to create a new MPOC Cert Period, you will need to access the “Goals” Section of the visit template.

Since the “Goals” Section is only included in the Initial Eval, Re-Eval and Discharge type of visits, you may need to switch the visit type to a Re-Eval in order to add a new Medicare Plan of Care Cert Period.

You can do this by clicking on the drop down in the “Type” field at the top of the visit and selecting “Re-Eval”.

Once the visit template updates you will be able to access the “Goals” Section.



In order to create a new MPOC Cert Period click **“add”** next to “Medicare Plan of Care Certification Periods”.

Do NOT click “Edit” next to a MPOC period that has already been created and/or certified.

Medicare Plan of Care Certification Periods: [add](#)

Current:

begins on Feb 11, 2019 for 56 days which expires on Apr 07, 2019 [Edit](#) [Remove](#) [certify](#)

Once you click “Add” you will enter the start date in the *Begins On* field as the date you wish the Certification Period to begin. In most instances this will be the date of the current visit. Per compliance, this date should not be in the future. If you do enter a future date, the newly created certification period will not populate on the *Plan of Care Document* that is created.

In the *Duration* field, enter the length of the new MPOC Cert Period in days, without going longer than 90 days. Then click “Save Certification”.

Medicare Plan of Care Certification Periods: [add](#)

Begins on

Duration
 days

[Cancel](#)

Once you have added the new Medicare Plan of Care Cert Period, you can switch the visit type back to what it was originally scheduled as or you can leave the type as Re-Eval.

Please note, the Visit Type is independent of what you charge in the Treatment Section. (i.e- you are not required to charge for a Re-Eval when using the Re-Eval Visit Type).

Just as you did for the original Medicare Plan of Care Cert Period, when you have completed your documentation for the current visit, you will create a *Plan of Care Certification* document as one of your reports within the “Document Visit Section”.

You can fax this document directly to the physician by checking the box next to the document, clicking on the “Fax” button and then clicking “Send Fax”.

When the Certified Plan of Care document is received back from the physician, you will follow the same process that is listed above under the “*Certifying the Medicare Plan of Care Certification Period*” section of this document. This includes uploading the signed document to the patient’s Episode of Care Chart and Certifying the MPOC Cert Period.

Maintaining Compliance with Certification Timeframes:

Within OptimisPT we offer a couple ways to help you maintain compliance with Medicare timeframe requirements.

First, you will see an alert appear if you reach 7 days prior to the MPOC Certification Period expiration date which will count down to zero and then expired, if an additional MPOC Cert Period is not created.

The alert will start off yellow and turn red when the MPOC has expired.

This alert will be visible within the “Goals” Section of the visit, along the left hand side of the visit template and within the patient’s Episode of Care chart.

The screenshot displays a sidebar on the left with a list of items: Recommendations (green checkmark), Treatment 2.0 (red exclamation mark), Home Exercises 2.0 (green checkmark), Plan (green checkmark), MIPS (green checkmark), and Document Visit (green checkmark). Below this list are two yellow alert boxes: 'Current Plan of Care will expire in 7 days.' and 'Medicare Plan of Care Certification Period will expire in 7 days.'

The main content area shows 'Plan of Care Duration: begins on Jan 31, 2019 for 8 weeks which expires on Mar 27, 2019 Edit' with a yellow alert box: 'Current Plan of Care will expire in 7 days.'

Below that is 'Medicare Plan of Care Certification Periods: add'. Underneath, it says 'Current: begins on Jan 31, 2019 for 56 days which expires on Mar 27, 2019 Edit Remove certify' with a yellow alert box: 'Medicare Plan of Care Certification Period will expire in 7 days.'

A green bar at the bottom of the main content area contains the text: 'SECTION COMPLETE Case must have one or more goals.'

The other timeframe that can be monitored is the requirement that the physician sign the MPOC Certification Document within 30 days of it being created.

You can use the *Medicare Certification Status Report* within the “Reports Tab” to keep track of this requirement.

You can choose to run this report by Physician, Clinic, Therapist or Practice.

Once you click “View Report”, you will be able to see which MPOCs have been certified and which have not.

Reports

Medicare Certification Status ▾
For Physician ▾
Abbott, Terri ▾
Direct Access: All ▾

View Report

If marked as *Certified* within OptimisPT, the date the MPOC was signed by the physician will be present in the “Certified” field.

If the MPOC has not yet been marked as certified within OptimisPT, there will be a “No” in the “Certified” field of the report and the number of days left to have it certified will be listed in the “Days to Signature Due” field.