

Pre Claim Review Initial Checklist

Task # 1: Face-to-Face (F2F) Clinical Encounter Notes		
Document	Included	N/A
F2F (physician generated) Encounter Note		
Discharge Summary if Coming From Facility		
Office Visit Note if Coming From Outpatient		
Task #2: 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.		
Document	Included	N/A
F2F Form From the Home Health Agency Sent to the Physician (not required)		
Plan of Care Certification Orders		
*Comprehensive Assessment		
*Physical Therapy Evaluation		
*Occupational Therapy Evaluation		
*Speech Language Pathology Evaluation		
*Visit Note by the Home Health Agency Staff		
Task #3: Plan of Care (POC) Signed and Dated by the Certifying Physician		
Document	Included	N/A
Initial POC/Certification		
Task #4: Signed and Dated Physician’s Certification		
Document	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		
Document	Included	N/A
Comprehensive Assessment		
Initial Physical Therapy Evaluation		
Initial Occupational Therapy Evaluation		
Initial Speech Language Pathology Evaluation		
Nursing Visit Notes		
Physical Therapy Visit Notes		
Occupational Therapy Visit Notes		
Speech Language Pathology Visit Notes		