**CREATING THE 'HOME HEALTH CERTIFICATION AND PLAN OF CARE'
(CREATING THE 485)**

SUMMARY

The following describes the steps to create the 'Home Health Certification and Plan of Care' (485) in **Horizon.** The 485 is used to establish the patient's treatment plan for the initial certification period and any continued sixty day 'recertification' periods. The 485 can be created on the laptop or desktop computer. The process is the same for the laptop or desktop user.

ROLES

- It is the responsibility of the Nurse Care Coordinator to assess assigned patients initially and at 60 day intervals and enter all necessary data in **Horizon** to create the '**Home Health Certification and Plan of Care.'**
- Either the clerical staff or the Nurse Care Coordinator can create the certification in **Horizon** based on roles and responsibility established for the subunit or area.
- The clerical staff will print certifications daily.
- The Nurse Care Coordinator or Supervisor will review and sign the printed certification.
- After the certification is reviewed and signed and prior to mailing, the certification will be marked 'completed' by the clerical staff**.**
- The clerical staff will mail signed and completed certifications at a minimum of three times a week.

PROCESS

Overview of the Certifications Feature of Horizon

1. The **Certifications** feature of Horizon is where the **Home Health Certification and Plan of Care (485)** is created, printed and completed.

2. Use **Certifications** to create the initial certification and any recertifications.
   - We do not use the Medical Update part of **Certifications.**

3. When certifications are created, Horizon uses information already entered into the system to pre-fill as many of the fields as possible. This is why it is important to update all patient data including medications, orders, diagnoses, guidelines/goals, and OASIS assessments as applicable and demographic data prior to creating the certification.

4. All icons in the **Certifications** section of Horizon are not available and/or active until specific actions are performed. See the following table for an overview of specific '**Certifications'** icons.

Click Here	To...
	Return to the **Select Customers & Admissions** window. Use this window to select customers and admissions for which you can create new certifications, or view/edit existing certifications. Certifications default to this window when you open the application.
	Open the **New Certification** window, where you can create a certification after you select customers. Use this option if you need to create a new certification or recertification. For more information, go to one of these topics:
	Open the **Print Certification/Medical Update** window to print a customer's certification. Use this print function to select one customer for whom you want to print certifications. If you want to print certifications for more than one customer, use the **Print Multiple Certs** option.
	Open the **Print Multiple** window. Use this window to print multiple certifications for various customers. Here, you can select various options and filtering criteria to print a group of certifications.
	Open the **Select Certification/Medical Update** window. This window displays a list of all certifications for this patient admission. The listed certifications can be viewed but not changed, if the certifications have been completed. We do not use the medical updates section.
	Open the **Select Diagnoses** window, where you select diagnoses to include in the certification. The diagnoses you see in this window are specific to the selected admission.
	Open the **Select Surgical Procedures** window, where you select a surgical procedure to include in the 485. The surgical procedures you see in this window are specific to the selected admission.
	Open the **Select Medications** window, where you select medications to include in the 485. The medications you see in this window are not admission specific. Instead, they are all of the medications currently in this customer's record.
	Open the **Select Physician Orders** window, where you select orders to include in the 485. The orders you see in this window are specific to the selected admission.
	Open the **Select Goals** window, where you select Guideline goals to include in the 485. The goals you see in this window are specific to the selected admission.

🔳	Open the **Certifications** window, where you review and edit the contents of the certification
🔳	**Our agency is not using this option.** Open the **Medical Update** window, where you review and edit the contents of the 486. Please note: This option is only available if a 486 exists for the selected customer and admission.
✔	Mark a certification complete. Please note: After you complete a certification, this button will disappear from the toolbar. You can only complete a certification once. In its place, the annotation button displays: 📄
↻	The right-hand arrow displays on the **Certifications** window only. Use this button to update/**Refresh** the information in certain locators on the document. For information about which locators the refresh function can update or for information about how to refresh a 485 go to **'Refreshing a Certification.'**

5.   The library text function is available for 485 Locators 14, 15, 16, 17, 18a part (B), 18b part (D), and 19 part (8).
   - Use the Library Text function to select pre-defined text items to populate certain text fields.
   - Press F10 on the keyboard to open the **Library Text** window.

6.   Fields in the certification document are either white or gray. White fields can be edited in the document. Grey fields can't be edited in the document.
   - Edit grey fields by using the blue hyperlink. Data is edited at the actual source.

7.   Each text field accepts a fixed number of characters. If the text exceeds the space, a **Form 487**, **Addendum,** is automatically created.
   - The **Addendum** can only be viewed in **Print** or **Print Preview** modes.

8.   If several patients were selected in the **Customers and Admissions** screen, you can switch the patient admission displayed by using the drop down arrow in the **Patient Admission** box.
   - When the drop down arrow is clicked, all patient admissions chosen in the **Customer and Admission** screen are available to choose.

Creating the Home Health Certification and Plan of Care

1.   Prior to creating the certification, the Nurse Care Coordinator will make the admission or reassessment visit to complete the comprehensive assessment and

establish or update patient data needed for the **Home Health Certification and Plan of Care.** This data includes:

- Medications
- Diagnoses
- Non-Interim orders
- Goals, Rehab Potential, and Discharge Plans entered from Guidelines
- Other data as indicated

2. Verify that the clinical information has been entered and/or updated prior to creating the certification.

3. From the Horizon main menu go to **Clinical/Certifications** or **Clinical/Clinical Explorer**.
   - To access the **Certifications** feature through **Clinical Explorer,** search for and **Add Case** to the tree view. Highlight the added case/patient by admission and then from the **Clinical Explorer** menu, choose **Go/Certifications.**
     - The **Certifications & Medical Updates** screen opens with the selected Patient and Admission.
   - If choosing **Certifications** from the Horizon main menu, the **Select Customers & Admission** screen opens.
     - Search for and choose the patient and admission by using the **Search** button.
     - The **Organization tab** is not useful for our agency since all patients are at the top level.
     - Once a patient admission has been chosen, **click** on the **Certifications & Medical Updates** icon.

4. From the **Certifications & Medical Updates** screen, **click** the **New** icon. The **New Certification** screen is displayed.

5. In the **New Certification** screen, verify that the defaulted information is correct and make changes as needed.
   - Verify correct **Payor, Physician, and Author** for certification.
   - Verify **Certification Period**. Be very alert to certification dates.
   - Verify **Address** for **Physician** and **Patient.**

6. Once the certification has been created, the information displayed in the **New Certification** screen can be accessed and updated by using the **Update Certification Information** icon.
   - This feature is available when the **Certification** is displayed.

7. If prior certifications exists for this patient, a pop up box will appear with the message, '**Yes' to copy from existing Certification, 'No' to generate new Certification. Answer NO.**

8. For unskilled patients, other warnings may appear. Note the warnings so that the new 485 can be completed correctly. Click **OK** to any other warnings.

9. The newly created **Certification** dates will appear in the **Select Certification** grid. **Highlight** the new cert and **click** on the **Certification** icon. (The C)

10. Verify data as it appears in the Certification.

11. **Locators 1, 2, 4, 5, 6, 7, 8, and 9:** These locators can't be edited on the certification. If errors are found, the section of Horizon that the data populates from has to be edited.
    - Note: Locators 1 and 6 do appear on New Certification or the Update Certification screens but only information attached to the patient in Customer Maintenance can be selected.
        - ➢ If the patient address is wrong, update the home address in Customer Maintenance and then refresh the certification to obtain the updated address.

12. **Locators 10, 11, 12, 13, 21, and 22:** Changes can be made to the populated **diagnoses, medications, orders, and goals** by using the **blue hyperlink** located above each of these sections.
    - Any changes needed to these sections must be made by using the hyperlink and changing the information at the actual source. These locators can't be edited on the 485.
    - The **blue hyperlink** will take you to the actual source of the data, the first screen displayed, and the 'Accumulator' screen, the second screen.
    - When the first screen displayed is closed, the 'Accumulator' screen can be seen.
    - Use the accumulator screen to add or remove any individual items.
    - **Note:** The blue hyperlink for goals does not work in some cases due to a computer problem. If the blue hyperlink for Goals does not work, use the Goals Icon located under the menu to access the Select Goals accumulator.

13. The **Accumulator** screen for Diagnoses, Surgical Diagnoses, Medications, Orders, and Goals can be accessed directly from the specified icons at the top of the displayed screen.

14. In the accumulator screen, use the add and remove arrows to add or remove needed data for the 485.
    - Anything displayed on the right side of the screen will be included on the 485.
    - Highlight the item to change before clicking on the add or remove arrows.
    - Click the **Save** icon to save changes.
    - Once the accumulator is as desired, return to the certification by clicking the **Certifications** icon.

15. If changes are made in any section prior to printing the document, click the **Refresh** icon from the **Certification** screen to update the information listed on the certification. The keyboard function key **F5** can also be used to **Refresh.**
    - The use of **Refresh** only updates specific locator information.

16. Always hyperlink to **Orders.** Add 60 day summary information needed for recertifications.
    - Sixty day summary information can be copied and pasted from the **Note** into the order text.

17. With each non- interim order reviewed, enter an **End Date.**
    - The end date will be the last day of the certification period unless otherwise ordered by the physician.

18. **Locators 14-16 and 18-20:**
    - For skilled patients, these locators populate from the most recent assessment for this admission. Do not change these pre-populated locators; otherwise there will be inconsistency between the 485 and the assessment.
    - For unskilled patients, the Nurse will document this information in the clinical note, using library text,
        - ➢ If the nurse creates the certification, then the information can be documented directly in the certification.
        - ➢ If the clerk creates the certification, the clerk will use the information documented in the **Clinical Note** to complete these locators.
    - **Zoom Function:** When documenting information directly in these locators, the function key **F8** can be used. This will open a pop up box where all information can be entered and viewed.

19. **Locator 17: Allergies**
    - Allergies populate from the patient's allergies entered in Clinical Explorer or Customer Maintenance.
    - This locator can be edited and library text can be used.
    - The Zoom function is also available.

20. **Locator 23: Verbal SOC Date**
    - Use the drop down calendar box to enter the **Verbal SOC Date.**
    - The Verbal Start of Care date is the date the order is received to start or to continue ongoing services.

21. **Locator 25: Date HHA received Signed POT**
    - Leave blank when the certification is created.
    - The field will be date stamped upon receipt from the MD.

22. **Locators 26, 27, 28:** Leave as defaulted.

23. Once the certification is finished, print the certification for review and signature.

- All finished certifications can be printed at one time as part of daily office processes.

Recreating a Certification

1. The **Recreate** function allows the user to recreate an existing incomplete certification.
   - When you recreate a certification, you essentially start over with a new certification.
   - All prior customized text previously entered will be lost.

2. **Do not** use this function unless you want to start over creating the certification.

3. To **recreate** a certification, select **Entry** on the menu bar and then select **Recreate.**

4. The warning message appears advising the user that the action will clear additions and changes made to the new certification. Click **Yes,** if you wish to continue.

5. Answer **No** to the next message screen asking if you wish to copy information forward from a previous certification.

6. The certification is recreated and a message appears advising the user to verify all necessary information.

Printing the Certification/s for One Patient Admission

1. Single or multiple certifications can be printed for one patient admission or they can be printed for multiple customers and admissions at the same time.

2. To print a single or several certifications for one patient admission, use the **Print** icon. The **Print** icon can be accessed from the **Select Certifications/Medical Updates** icon or the **Certifications** icon.

3. The **Print Certification/Medical Update** screen opens, listing all certifications for the selected admission.

4. Use the table below to make the appropriate selections in this window.

Option or field	Description/Instruction
Current Selections	This grid displays every certification document attributed to this patient for the selected admission. Notice the admission ID displays in the **Admission** column on the grid. To select one or more certifications to print, hold down the Ctrl key and left click on the certifications you want to print. **Even if only one certification is listed in the grid, you must click on it to highlight it before you can print.** Please note: If nothing displays in the grid, then one of the following may be true: -You did not select an admission, or you selected the wrong admission. Return to **Select Customers & Admissions** window to make your selection. -Your Horizon Homecare database contains no certifications for this admission.
Select All	Click here to select all documents in the grid for printing.
Clear Selections	Click here to clear any selections you made. You can begin selecting again.
Options	In this group box, select or clear these options: <u>Select</u> **(Leave Checked) Print 487 Addenda, if any**--If you do not print the 487, then long text will be truncated (that is, cut short to fit in the field), and omitted text will not be visible to the reader. To ensure all text in the certification document prints, select this option. <u>Select</u> **(Leave Checked) Screen Preview** if you wish to view any addendums. The preview is the only place in Certifications where you can view 487 addenda. If there are no addenda for this certification, none will display in the screen preview. The screen preview shows one document at a time. **Please note: Clear this option if you want to schedule the print job for a later time.** <u>Select </u>**(Leave Checked) Print Annotations, if any**--Select this option if you want to print any annotations attached to the selected certifications. This is the only place where you can print annotations. <u>Leave unchecked</u>**, Save Workfile**--If you select this option, then printing a document also saves the document's data in a database table.
Form Type	Click **Pre Printed Form**--This selection prints the certification on a pre-printed standard form.

5.   When desired selections are made, click **Print** to print the selected document/s or **Cancel** to exit the window without printing.

Printing Multiple Certifications for Multiple Patient Admissions

1.   The **Print Multiple Certs** icon is available from all of the screens in the **Certification** program.

2.   To print multiple certifications for many patient admissions, click on the **Print Multiple Certs** icon.

3.   The **Select Range of Certification/Medical Update to Print** window opens with the **Range** tab forward.

4.   You must set filters to limit the print job to specific subunit certifications. If you click OK without setting filters, all certifications in Horizon will print.

5.   Set filters on the **Range** tab as follows:

Option	Description / Instruction
Types	**Click** in the checkboxes to clear Hospice, 486s, and Annotations. Print only 485s and 487s.
Format	**Click Pre Printed Form**--This selection prints the certification on a pre-printed standard form.
Date Range	**Check Creation Date**. Enter the desired date range.
Outstanding certifications	Select this checkbox if you want to print only outstanding certifications.

6.   Use the **Customer** tab if you want to limit the print selections to specific customers and admissions.
   - Use the search feature to search and select the patients by admission that you want to include to print.

7.   Use the **Organization tab** to filter by **Org Level.**
   - Use the search feature to select the desired Org level.
   - Select the desired Org Level and click **Add Selection.**

8.   Once the desired filters have been set, click **OK** at the bottom of the screen.

9.   Click **OK** from the **Program Executions window** to print selections or the print job can be sent to **Job Scheduler** to print later as desired.

Completing the Certification

1. Complete the certification, after it has been printed, reviewed, and signed. Make sure the certification is completed prior to mailing.

2. The certification can be completed either by the reviewing nurse or the clerical staff depending on specific subunit processes.

3. To complete the certification click on the **Mark Document Complete (Red Check)** icon.

4. The Mark Document Complete icon is available from the **Certification** screen or the **Select Certification Screen.**
    *   The specific certification has to be highlighted in the **Select Certification Screen** for the **Mark Document Complete** icon to be available.

5. Once you click on the **Mark Document Complete** icon, the icon will disappear and the certification will be marked as completed.

6. Once the certification is completed, the **Annotations** icon will be available.

7. Once a certification has been marked completed and mailed, it should never be 'unlocked/uncompleted'.
    *   Annotate the certification if necessary using the **Annotations** icon.
    *   Correct wrong information on the certification by using an **Interim Order**.