

# EpicEdge Tips & Tricks

## Adding Verbal SOC Date to Plan of Care

There is a new section on the SOC and recert plan of care labeled "Additional Information."

The screenshot shows the EpicEdge interface for 'Advance Care Planning'. It includes sections for 'Additional Information' and 'Physician or Allowed Practitioner Certification'. In the 'Additional Information' section, a red box highlights the '+ Create Note' button. Below it, a message states: 'No Home Health Additional Information note has been created for the current plan.' The 'Physician or Allowed Practitioner Certification' section also has a '+ Create Note' button and a message: 'No Certification Statement note has been created for the current plan.' At the bottom, there are 'Delete', 'Share', and 'Print' buttons.

Quality staff will need to click "Create Note," similar to the provider certification statement. A default SmartText will automatically populate. Use F2 to jump to the wildcard, enter the date, then click Accept.

The screenshot shows the 'Edit Note' dialog box. The title is 'Edit Note'. The main text area contains 'My Note' followed by a rich text editor toolbar with icons for bold, italic, link, unlink, and insert smarttext. Below the toolbar, the text reads 'Verbal SOC was obtained on \*\*\*'. A red box highlights the 'Accept' button at the bottom of the dialog. The 'Cancel' button is also visible.

When the plan of care is finalized, this section will be included.

For recert visits, where the verbal start of care date is **not** required, do not click "Create Note." When the plan of care is finalized, this section will not be included.

### CLEAN-UP INSTRUCTIONS

For the MassHealth plans of care that need the verbal SOC date added, you will need to delete the existing plan of care. Click the Delete button in the lower left. **Make sure you are in the correct plan of care!** If the plan of care has already been sent and/or signed, this will remove all existing signatures, cancel the original order, and send a new order.

Discharge summary available upon request.

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**Advance Care Planning**

Code Status Prior Advance Directives and Living Will Not Received	Health Care Agent Boutet, Karen - Daughter - 617-875-1790 Power of Attorney Not Received	MOLST Form Received 8/29/2022
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**Physician or Allowed Practitioner Certification**

[+ Create Note](#)

**!** No Certification Statement note has been created for the current plan.

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[X Delete](#)

Next, click the Start a New Plan button and select the Home Health Plan of Care type.

**Start a New Plan** ✕

Choose the Plan's Type

CNS Plan of Care

Home Health Plan of Care

Home Health ROC Plan of Care

Home Health ROC/Recert Plan of Care

[Create](#) [Cancel](#)

If this is the Start of Care visit, the certification period should populate automatically. If you are re-creating a recert plan of care, you will need to select the correct encounter from the list that pops up by clicking the blue hyperlink with the recert assessment.

The screenshot shows a window titled "Cert Period Management" with a close button (X) in the top right corner. A yellow warning banner at the top reads: "This plan is not linked to a cert period. To access the plan, select a certification period and an encounter assessment to which this plan should be linked." Below the banner is a table with columns: "#", "Encounter Date", "Cert Start", and "Cert End". The second row is highlighted in purple.

#	Encounter Date	Cert Start	Cert End
2	10/30/2023	11/04/2023	01/02/2024
1	09/05/2023	09/05/2023	11/03/2023

To the right of the table is a section titled "Linkable Assessments" with a red border. It contains the text: "Click below to link this Plan of Care to the selected assessment." followed by a blue hyperlink: "SN OASIS Recertification on 10/30/2023". Below this section is a white box with the text: "No plans to display for the selected certification period."

A warning will appear. Verify the information is correct, then click Accept.

The screenshot shows a confirmation dialog box titled "Link Plan of Care to Certification Period and Assessment" with a close button (X) in the top right corner. The text inside reads: "Confirm how this Plan of Care is linked to a patient documentation:" followed by two bullet points: "• Certification Period: #2 (11/4/2023 - 1/2/2024)" and "• Assessment: SN OASIS Recertification on 10/30/2023". Below the bullet points is the text: "You cannot undo this link." At the bottom of the dialog are two buttons: "Accept" (with a green checkmark icon) and "Cancel" (with a red X icon).