

# EpicEdge Tips & Tricks

## Error Correction in Home Health Plans of Care

Follow these steps to handle some of the most common quality review issues. All these workflows start with opening the Plan of Care activity for your home health patient and selecting the Plan of Care. If the POC is already finalized, click **Create Addendum** or **Create Revision** to be able to edit it.

### Plan of Care

← All Plans Home Health Plan of Care 02/19/22

#### Home Health Plan of Care

#### 02/19/22

Effective from: 2/19/2022 Effective to: 4/19/2022

Plan ID: 31

#### Participants as of 4/14/2022

Name	Type	Comments	Contact Info
Conlan M. Brock, PT	M0018 Provider		
Rowan M. O'Dell, PTA	Physical Therapy		

#### Patient Information as of 4/14/2022

(M0040) Name	(M0040- M0060) Address	(M0066) Date of Birth	(M0069) Sex	(M0065) HI Claim No.
Herne, Asher H	—	2/21/1961	Male	—
(M0030)	Referral Date	Certification	MRN	

✕ Delete

🔒 Create Addendum

## Change the Dates for a Certification Period

1. In the sidebar, click the certification period listed under Dates.
2. Change the dates for the certification period as needed.
3. Click **Accept**.
4. If there are no more changes needed, click **Finalize**.

The screenshot shows the 'Plan of Care' interface for a 'Home Health Plan of Care 04/20/22'. A 'Cert Period Management' dialog box is open, displaying a table of certification periods and a calendar for editing dates. The table has columns for '#', 'Encounter Date', 'Cert Start', and 'Cert End'. The first row is highlighted in blue. The dialog box also shows a calendar for the month of June 2022, with the date 6/18/2022 selected. The 'Cert Start' field is set to 4/20/2022 and the 'Cert End' field is set to 6/18/2022. The 'Accept' button is highlighted with a red circle.

#	Encounter Date	Cert Start	Cert End
2	04/20/2022	04/20/2022	06/18/2022
1	02/19/2022	02/19/2022	04/19/2022

Calendar: Jun 2022

Days: Su, Mo, Tu, We, Th, Fr, Sa

Week 1: 29, 30, 31, 1, 2, 3, 4

Week 2: 5, 6, 7, 8, 9, 10, 11

Week 3: 12, 13, 14, 15, 16, 17, 18

Week 4: 19, 20, 21, 22, 23, 24, 25

Week 5: 26, 27, 28, 29, 30, 31

Week 6: 1, 2, 3, 4, 5, 6

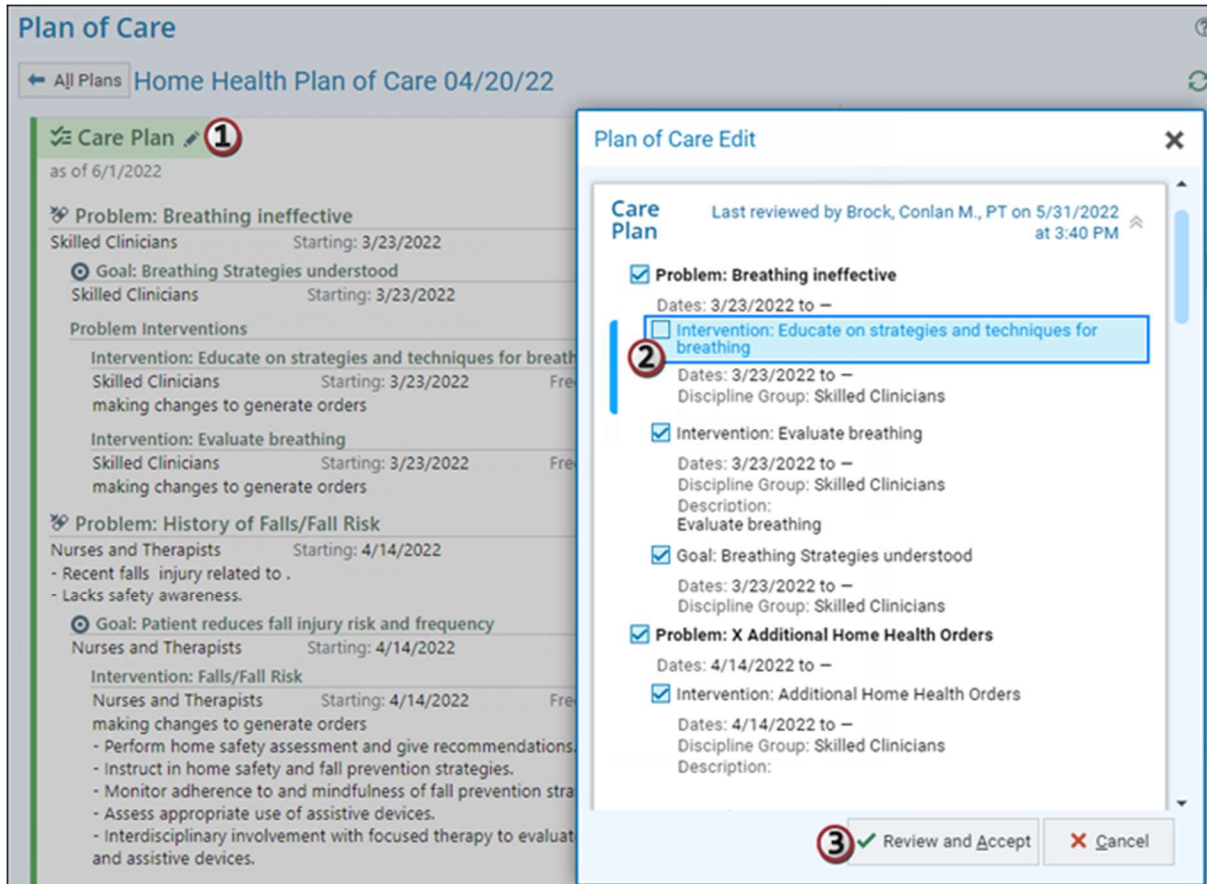
Buttons: Accept, Cancel

## Edit a Signed Plan of Care

When you create an addendum, all report sections in the Plan of Care are refreshed automatically.

If you need to change which medications, care plan elements, or visit sets appear on the POC:

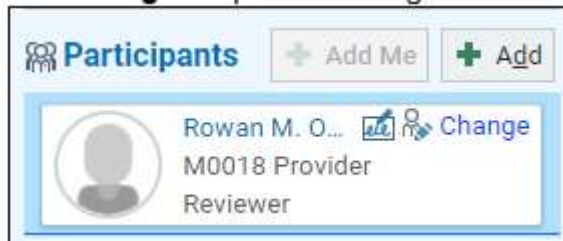
1. Click the pencil icon for the section you want to edit.
2. Clear or select check boxes to determine what information appears in the POC. A colored bar appears next to anything you change.
3. Click **Review and Accept**.



Note: Changes to the medications, care plans, or visit sets themselves are made in the Medications and Care Plan tasks on the Remote Client. You cannot edit them in the Plan of Care activity.

### Change the M0018 Provider and Re-Send the POC

1. In the list of participants, find the provider listed as the M0018 Provider.
2. Click **Change** to open the Change M0018 Provider window.



3. Select a new provider and click **Change**.
4. The previous M0018 provider remains on the Plan of Care. If you want to remove that provider, click **X**.

When you finalize the Plan of Care, it is sent to the new M0018 provider.

### Delete a Certification Period

The workflow is slightly different if you are deleting the current period or an earlier period.

To delete the most recent cert period:

1. Click the link to edit the certification period.
2. On the Cert Period Management window, make sure the most recent period is selected.
3. Click **Delete Cert Period**.

The screenshot shows a 'Plan of Care' window for a 'Home Health Plan of Care 02/19/22'. A 'Cert Period Management' modal is open, displaying a table of certification periods. The most recent period, #2 (4/20/2022 - 6/18/2022), is selected and highlighted in blue. A red circle with the number '2' is placed over the 'Encounter Date' of this row. To the right of the table, a red circle with the number '1' is placed over the 'Dates' section, and another red circle with the number '3' is placed over the 'Delete Cert Period' button. The table has columns for '#', 'Encounter Date', 'Cert Start', and 'Cert End'. Below the table, there are input fields for 'Cert Start' (4/20/2022) and 'Cert End' (6/18/2022).

#	Encounter Date	Cert Start	Cert End
2	04/20/2022	04/20/2022	06/18/2022
1	02/19/2022	02/19/2022	04/19/2022

To delete an earlier period:

1. Click the link to edit the certification period.
2. On the Cert Period Management window, make sure the period you want to delete is selected.
3. Change dates for the period dates so that today is in the date range, such as by setting the end date to today.
4. Click **Delete Cert Period**.