

Summary of the Face-to-Face Physician Encounter in NDoc:

HOME CARE	
Face-to-Face in NDoc	Comments:
<p>Operations>Intake>Patient Referral>Face-to-Face</p> <p>OR</p> <p>Patient Profile (from Care Pilot, Administration or Operations)>Face-to-Face</p> <p>OR</p> <p>Care Pilot>Visit Charting>Today's Care>Face-to-Face</p>	<p>Basic Summary Chart the face-to-face encounter at the time of Referral, or if not completed until later, record in Patient Profile or Today's Care (non-OASIS charting screens only):</p> <ul style="list-style-type: none"> Date of Last F2F Encounter: is the date of face-to-face encounter. Referring MD: name of MD who completed the face-to-face encounter. MD Designee: complete if the encounter was conducted by a nurse practitioner, clinical nurse specialist, or physician assistant. The referring MD would be the name of the physician who is certifying the encounter. Date Last Seen: was the face-to-face encounter related to reason for needing home care: if No is selected, NDoc will consider the face-to-face requirement unmet even if the date last seen was in the appropriate timeframe. Signature received for face-to-face encounter: select Yes if the certification of the face-to-face encounter is already signed. This can also be entered in Physician Orders as a Face-to-Face order that is Obtained. (See information below under Physician Orders section). Date signature received for face-to-face encounter: complete this field if tracking the signed encounter on the face-to-face screen rather than with an Obtained physician order. Reason for Home Care: use this optional field to document the reason why the face-to-face encounter was related to the patient's need for home care.
<p>Physician Orders</p>	<p>Chart an order for the face-to-face certification using Physician Orders:</p> <ul style="list-style-type: none"> Select Obtained if the physician has already signed the face-to-face certification Select Required if the certification is not signed. NDoc will generate a PVC or include the order on the 485 depending on your agency settings. When the order is returned signed, indicate that the face-to-face order is signed by documenting the charting fields listed above found within the Face to Face category in Patient Profile or Today's Care. NOTE: Users MUST take the step to go to the Face-to-Face screen to indicate that signature was received otherwise the patient will remain on the Face-to-Face report for no signature and Ready to Bill will not be satisfied.
<p>Document Library</p>	<p>Document the Face-to-Face in Document Library:</p> <ul style="list-style-type: none"> If the document is not set to auto create, click Add Document near the top left of the screen. Select Category: Face to Face. Select Type: Homecare F2F (NDoc's prebuilt option). Select the certification period, physician, and fill in the applicable dates You can upload a copy of the face-to-face document, if it was done outside of NDoc, and attach it to this document in Document Library.
<p>Reports</p>	<ul style="list-style-type: none"> Go to Reports>Tracking>Visit>Face-to-Face to track the missing documentation of F2F fields documented within the Visit Charting screens. The report alerts you to any home health patient with an insurer requiring a face-to-face encounter who is not in a Training company or whose company is blank and who: <ul style="list-style-type: none"> Does not have a face-to-face encounter charted within the Visit Charting screens Has a face-to-face charted, but it is outside the appropriate timeframe indicated by CMS: more than 90 days prior to the SOC date or more than 30 days after or was charted as not related to the reason for home care

HOSPICE	
Face-to-Face in NDoc	Comments:
<p><i>Patient Profile (from Care Pilot, Administration or Operations)>Hospice>Hospice Face-to-Face</i></p> <p>OR</p> <p><i>Care Pilot>Visit Charting>Today's Care</i></p>	<p>Chart the face-to-face encounter:</p> <ul style="list-style-type: none"> NDoc will indicate the beginning date of the 1st and 2nd 90 day cert period as well as the latest 60 day cert period. These fields are view only. Date of Last F2F Encounter: date of face-to-face encounter. Hospice Physician: name of the physician that completed the face-to-face encounter. MD Designee: complete if the encounter was conducted by a nurse practitioner. The hospice physician field would list the name of the hospice physician who is certifying the encounter. Date Last Seen: was the face to face encounter related to reason for needing hospice: if NO is selected, NDoc will consider the face-to-face requirement unmet. If YES, the following field is required. Date signature received for face-to-face encounter: complete this field if tracking the signed encounter on the face-to-face screen rather than with an Obtained physician order. (See information below under Physician Orders section). Reason for Hospice: use this optional field to document any additional specifics <p>To view the history of face-to-face encounters for this patient, click in the desired field and click the History button near the top left of the screen or go to Operations>Patient>Flow Sheet and select the Face-to-face Flow Sheet option</p>
<p><i>Physician Orders</i></p>	<p>Chart an order for the face-to-face certification using Physician Orders:</p> <ul style="list-style-type: none"> Select Obtained if the physician has already signed the face-to-face certification. Select Required if the certification is not signed. NDoc will generate a PVC or include the order on the 485 depending on your agency setting. When the order is returned signed, indicate that the face-to-face order is signed by entering YES in the "Date Last Seen was the face to face encounter related to reason for needing hospice" field and enter applicable date in the "Date signature received for face to face encounter" field in charting screens under Hospice Face to Face in Profile or Today's Care. NOTE: Users MUST take the step to go to the Face-to-Face screen to indicate that signature was received otherwise the patient will remain on the Face-to-Face report for no signature and Ready to Bill will not be satisfied.
<p><i>Document Library</i></p>	<p>Document the Face-to-Face in Document Library:</p> <ul style="list-style-type: none"> If the document is not set to auto create, click Add Document near the top left of the screen. Select Category: Face to Face. Select Type: Hospice F2F (NDoc's prebuilt option). Select the certification period, physician, and fill in the applicable dates. <p>You can upload a copy of the face-to-face document, if it was done outside of NDoc, and attach it to this document in Document Library.</p>
<p><i>Reports</i></p>	<ul style="list-style-type: none"> Go to Reports>Tracking>Visit>Face-to-Face to track the missing documentation of F2F fields documented within the Visit Charting screens. The report alerts you to any hospice patient with an insurer requiring a face-to-face encounter who is not in a Training company or whose company is blank and who: <ul style="list-style-type: none"> Does not have a face-to-face encounter charted within the Visit Charting screens Is within 30 days of approaching the 3rd or later benefit period Has a face-to-face charted, but it is outside the appropriate timeframe indicated by CMS or was charted as not being related to the reason for hospice

For Home Care Patients:

At time of referral, the face-to-face encounter can be recorded by going to Referral>Face to Face or if the face-to-face encounter information is obtained after the referral is processed, it can be recorded by going to Patient Profile>Face to Face or in Today's Care.

Special Considerations:

- For Referral:
 - Prior to the SOC date being established, NDoc will use the referral date to determine if the face-to-face encounter is within the proper timeframe.
 - Face-to-face requirements only apply to insurances designated as such in the Insurance table.
- For Charting Screens: These items are NOT available in OASIS charting screens.

To document the Face-to-face encounter, chart:

- **Date of Last F2F Encounter:** is the date of the encounter
- **Referring MD** is the name of the doctor that conducted the encounter, or the collaborating physician if the encounter was conducted by a non-physician practitioner (NPP)
- **MD Designee** complete if the encounter was conducted by a nurse practitioner, clinical nurse specialist, or physician assistant. The referring MD would be the name of the physician who is certifying the encounter.
- **Date Last Seen: was the face to face encounter related to reason for needing home care:** if **No** is selected, NDoc will consider the face-to-face requirement unmet even if the date last seen was in the appropriate timeframe.
- **Signature received for face-to-face encounter:** select **Yes** if the certification of the face-to-face encounter is already signed. This can also be entered in Physician Orders as a Face-to-Face order that is **Obtained**.
- **Date signature received for face-to-face encounter:** complete this field if tracking the signed encounter on the face-to-face screen rather than with an **Obtained** physician order.
- **Reason for Home Care:** use this optional field to document the reason why the face-to-face encounter was related to the patient's need for home care.

Use a Physician Order to track the face-to-face encounter certification

- Select the **Face to Face** Category
- Select a discipline
- For Home Health – Select the **Homecare Encounter Date** option.
- Document the face-to-face encounter date plus any additional specifics.
- Document the start and discontinue date for the order
- If the certification is already signed, enter an **Obtained** Physician Order to meet the F2F requirement for tracking and Ready to Bill. The charting screens may also be documented that the Face-to-Face the signature was received.
- If **Physician signature: Required** is selected, NDoc either generates a PVC or include the order on the 485 depending on your agency's settings. **NOTE:** When the verbal order is returned signed, users **MUST** go to the Face-to-Face screen to indicate that signature was received otherwise the patient will remain on the Face-to-Face report for no signature and Ready to Bill will not be satisfied.

Use a Document Library entry to track the face-to-face encounter:

- If the document is not set to auto create, click **Add Document** near the top left of the screen.
- Select Category: **Face to Face**.
- Select Type: **Homecare F2F** (NDoc's prebuilt option).
- Select the certification period, physician, and fill in the applicable dates.
- Upload a copy of the face-to-face document, if it was done outside of NDoc, and attach it to this document in Document Library.

Go to Reports>Tracking>Visit>Face-to-Face to track the missing documentation of F2F fields documented within the Visit Charting screens:

To select multiple patient statuses to be included in the report, hold down the CTRL key while clicking each status under that filter

The resulting report:

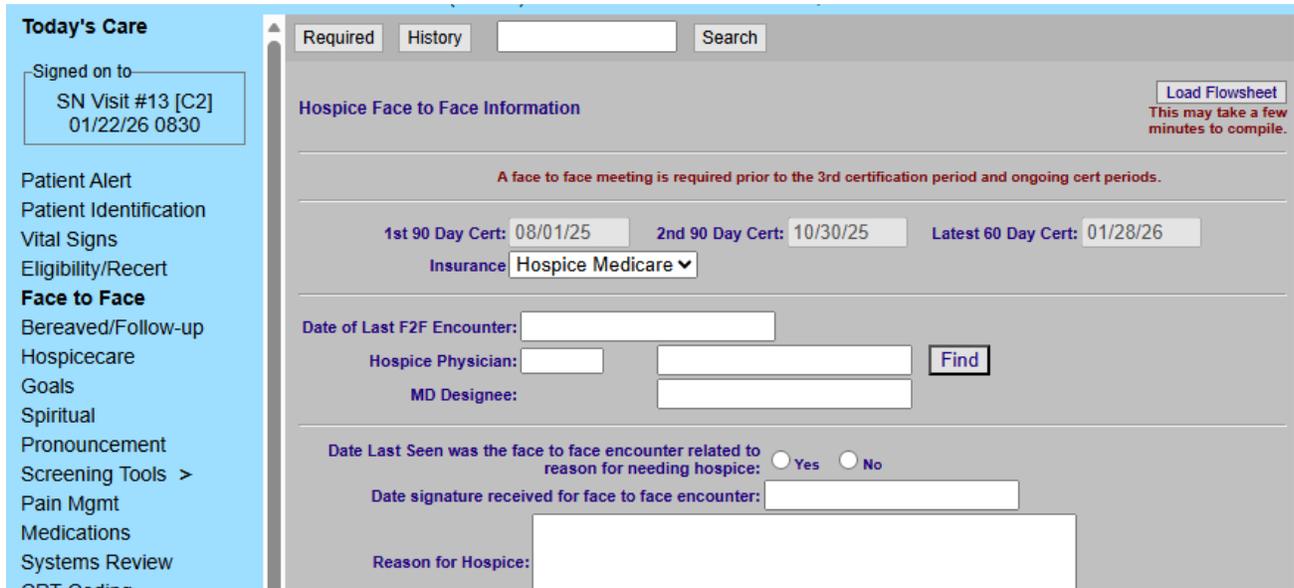
Case Manager	Patient Name (ID)	SOC	Reason	Attending Physician
Thornberry, JenB	JENTEST,F2FHH (1002943)	01/01/2026	Date Last Seen 90+ days before SOC.	Test,Jack (PECOS) - 10336489
Thornberry, JenB	JENTEST-NORTHERN,LIGHTS ALERT (1002792)	02/16/2024	Date Last Seen 30+ days after SOC.	Carlisle Cullen - 1000CC1
Thornberry, JenB	TESTING,TAYLOR (1002812)	01/22/2024	No Date Patient Last Seen. Date Last Seen not related to Face to Face.	Test,Jack (PECOS) - 10336489
Thornberry, JenB	JENTEST,CERTTEST (1002895)	11/06/2023	No Date Patient Last Seen. No Referring MD or MD Designee. No Face To Face Order.	Jentest,Doctor - 9874
Thornberry, JenB	JENTEST,PATIENTONE (1002854)	02/05/2023	No Date Patient Last Seen. Date Last Seen not related to Face to Face. No Referring MD or MD De...	Test,Doc - 1234TST
Thornberry, JenB	JENTEST,TESTHIPPS (1002886)	02/27/2023	No Date Patient La Referring MD or M...	

Summary	
Company	Count
DEMO LANCASTER HOME HEALTH AGENCY	12
[ALL]	12

This report will alert you to any patient that has not met the face-to-face requirements within the Visit Charting screens and has an insurer that is indicated in the NDoc insurance table as requiring face-to-face. The report will list patients with no face-to-face encounter charted within the Visit Charting fields, or one that is more than 90 days prior to or 30 days after the SOC, or where the face-to-face encounter is documented, but there is no physician signature certifying the encounter, or the encounter was charted as not being related to the reason for home care.

For Hospice Patients:

The face-to-face encounter is documented in Patient Profile>Hospice Face to Face or in Visit Charting>Today's Care:



To document the face-to-face encounter, chart:

- **Date of Last F2F Encounter** is the date of the encounter
- **Hospice Physician** is the name of the physician that conducted the encounter, or the collaborating physician if the encounter was conducted by a hospice nurse practitioner
- **MD Designee** is the name of the nurse practitioner
- **Date Last Seen was the face-to-face encounter related to reason for needing hospice:** if NO is selected, NDoc will consider the face-to-face requirement unmet. If YES, the following field is required.
- **Date signature received for face-to-face encounter:** complete this field if tracking the signed encounter on the face-to-face screen rather than with an Obtained physician order. (See information below under Physician Orders section).
- **Reason for Hospice:** use this optional field to document any additional specifics

To view the history of face-to-face encounters for this patient, click in the desired field and click the History button near the top left of the screen or go to Operations>Patient>Flow Sheet and select the Face-to-face Flow Sheet option

The hospice physician or nurse practitioner can document the face-to-face encounter in Patient Activity. If doing so, please remember to also document the visit in Patient Profile on the Hospice Face-to-Face screen. Complete the fields 'date patient last seen' as well as 'signature received' which are used by NDoc to identify those patients that have met the face-to-face requirement. Documentation by the hospice physician or nurse practitioner can also be

Go to Reports>Tracking>Visit>Face-to-Face to track the missing documentation of F2F fields documented within the Visit Charting screens:

To select multiple patient statuses to be included in the report, hold down the CTRL key while clicking each status under that filter

The resulting report:

Reports				
Face to Face				
<input type="button" value="Refresh"/> <input type="button" value="Save"/>				
Case Manager	Patient Name (ID)	SOC	Reason	Attending Physician
Thornberry, JenB	OLSEN, MILHOUSE N (1001652)	08/18/2025	No Date Patient Last Seen. No Face to Face order for this cert period.	Vanzetti, Edward O.
Thornberry, JenB	HOSPICE, HARRY (1002801)	08/20/2025	No Date Patient Last Seen. No Hospice Physician or MD Designee.	Carlisle Cullen - 1000CC1
Thornberry, JenB	JENTEST, MOREDASHBOARD (1002942)	06/24/2025	Date Last Seen not related to Face to Face. No Face to Face order for this cert period. No Hosp...	Test, Jack (PECOS) - 10336489
Thornberry, JenB	JENTEST, ABPECOS (1002924)	10/01/2024	No Date Patient Last Seen. No Face to Face order for this cert period.	Smith, David PECOS YES MD - 999
Thornberry, JenB	JENTEST, ANPPECOS (1002925)	10/01/2024	No Date Patient Last Seen. No Face to Face order for this cert period. No Hospice Physician or ...	Practitioner, Nurse - 332211
Thornberry, JenB	JENTEST, PECOSTWO (1002909)	08/01/2024	No Date Patient Last Seen. No Face to Face order for this cert period. No Hospice Physician or ...	Practitioner, Nurse - 332211
Thornberry, JenB	JENTEST, ABPECOS (1002924)	10/01/2024	No Date Patient Last Seen. No Face to Face order for this cert period.	Smith David PECOS YES MD -
Thornberry, JenB	JENTEST-ROTTERMAN, NATALIYA Q (1002931)	01/22/2025	No Date Patient Last Seen. No Face to Face order for this cert period.	Practitioner, Nurse - 332211
Thornberry, JenB	JENTEST-ROTTERMAN, NATALIYA Q (1002931)	01/22/2025	No Date Patient Last Seen. No Face to Face order for this cert period.	Practitioner, Nurse - 332211

This report will alert you to any patient that has not met the face-to-face requirements within the Visit Charting screens and has an insurer that is indicated in the NDoc insurance table as requiring face-to-face. The report will list patients with face-to-face coming due, with no face-to-face encounter, or where the face-to-face encounter is documented, but there is no physician signature certifying the encounter or the encounter was charted as not being related to the reason for hospice.

Primary Settings related to Face-to-Face Tracking:

For HBS/Netsmart Billing Customers: (Administration>System>Tables>Insurance)

Insurance Table Edit Mode: Add Change

Show: Active Only Inactive Only All
 Select: (Select Insurance) ▼

Number: Status: Active Inactive
 Name:
 Abbreviation:

International?: No Yes

Street 1: Contact Name:
 Street 2: Phone #:
 City: Fax #:
 State: ZIP Code: Provider #:
 Billing Form: (Select Billing Form) ▼
 Financial Class: (Select Financial Class)

OASIS Required? Yes No OASIS Effective Date:
 Plan of Care Required? Yes No F2F Effective Date:
 Face to Face Required? Yes No
 Therapy Counter? Yes No PDGM Date:
 Medicare PPS? Yes No
 Medicaid? Yes No
 Medicaid PPS? Yes No
 PDGM? Yes No
 PDGM HIPPS required? Yes No
 OASIS required for billing? Yes No
 Plan of Care required for billing? Yes No
 F2F required for billing? Yes No
 NOA required? Yes No NOA Date:
 Unit Number:
 BF Code:
 Hospice PECOS? Yes No

Face-to-Face Tracking for the tracking report or Ready to Bill functionality is controlled by designations within the Insurance table. Go to the to the Insurance Table (Administration>System>Tables>Insurance) to identify or designate insurers that require a Face-to-Face encounter. If applicable, use the "Face to face effective date" field to indicate the date the insurance provider started requiring a face-to-face encounter.

For NDoc Integrated Billing Customers: .

Insurance Table Edit Mode: Add Change

Show: Active Only Inactive Only All
 Select: (Select Insurance) ▼

Number: Status: Active Ina

Name:

Abbreviation:

Insurance Type: (Select) ▼ Location(s):

Billing Type: (Select) ▼

Financial Class: (Select Financial Class) ▼ Allow Overlapping Claims?

Policy # Validation: (Select) ▼ Allow Pre-Payment?

International?: No Yes

Street 1: Contact Name:

Street 2: Phone #:

City: Fax #:

State: ZIP Code: Provider #:

These settings drive clinical requirements based on insurance. Billing requirements are defined within Documentation Requirements.

OASIS Required? Yes No OASIS Effective Date:

Plan of Care Required? Yes No

Face to Face Required? Yes No F2F Effective Date:

Therapy Counter? Yes No

Face-to-Face Tracking for the tracking report or Ready to Bill functionality is controlled by designations within the Insurance table. Go to the to the Insurance Table (Administration>System>Tables>Insurance) to identify or designate insurers that require a Face-to-Face encounter for clinical tracking. If applicable, use the "Face to face effective date" field to indicate the date the insurance provider started requiring a face-to-face encounter.

General

OASIS Required?

HIPPS Required?

POC Required?

F2F Required?

To manage billing requirements for Face-to-Face, go to the Documentation Requirement settings associated with the specific Insurance Table entry. Set if the F2F is Required in the General section and if items such as F2F physician in PECOS or F2F Signed is *Required*, a *Warning*, or *Not Required*.

POC signed Required Warning Not Required

F2F physician in PECOS Required Warning Not Required

F2F signed Required Warning Not Required

Billed prior to Timely Filing Limit Required Warning Not Required

Troubleshooting Tips for the Face-to-Face encounter:

- We are using the Face-to-Face report and noticed that some of the patients we know have not met the face-to-face requirement are not showing up on the report. What is wrong?*
 Review the patient's insurance(s) and then check the Insurance table in NDoc. If the Insurance table does not indicate that face-to-face certification is required for this insurer, the patient will be excluded from the report. In addition, confirm the status of the patient, patients who have not yet had a SOC date entered will only appear on the report if the referral date has been entered. Therefore, patients who either do not have a SOC or referral date will not appear on the report.