# Managing Election Statement Addendum - Non-Coverage Documentation

## Overview

Effective 10/1/2026, based on the FY 2027 Hospice Rule (CMS-1851-F), hospices are required to provide the hospice election statement addendum to all Medicare beneficiaries at the time of the hospice election. This requirement is a change from the previous rule that mandated agencies only supply the document upon request.

## Non-Coverage Documentation within NDoc Background

The FY 2021 Hospice Rule (CMS-1733-F) included a mandate to require an "election statement addendum" designed to inform beneficiaries and families of non-covered conditions, items, services, and drugs be available upon request. Although agencies are not bound by a particular standard format, CMS has offered a model template for consideration. Each agency is different in terms of how they manage these sorts of internal documents and depending on how patient records are maintained agencies will want some flexibility in compiling the information. To assist agencies in compliance, NDoc offers the following:

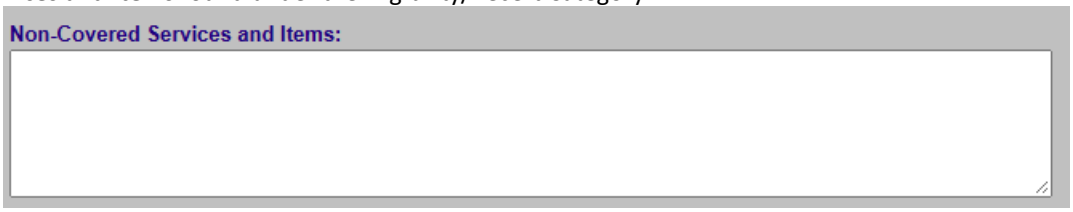
- A free text field in Visit Charting to capture “Non-Covered Services and Items”
- A “Terminal Relationship” field linked to Additional Diagnoses fields within the hospice diagnoses screens.
- A “Non-Covered Reason” field within the medication entry screens related to financial responsibility labels for medications with the list to include those in the table noted above. The field is sourced from the “Hospice Non-Covered Reason” Table.
- The Hospice Non-Covered Items, Services and Drugs Listing Report to be used as a tool to compile and supplement the agency's documentation and included as an attachment to the agency's adopted documentation. The report is accessible within the Patient Summary Report Manager listing and under Batch Reports under Reports>Patient and includes:
  - General patient information
  - Diagnoses
  - Medications with financial responsibility details, including the “Non-Covered Reason”
  - Value of the “Non-Covered Services and Items” free text field

## Related Fields/Settings

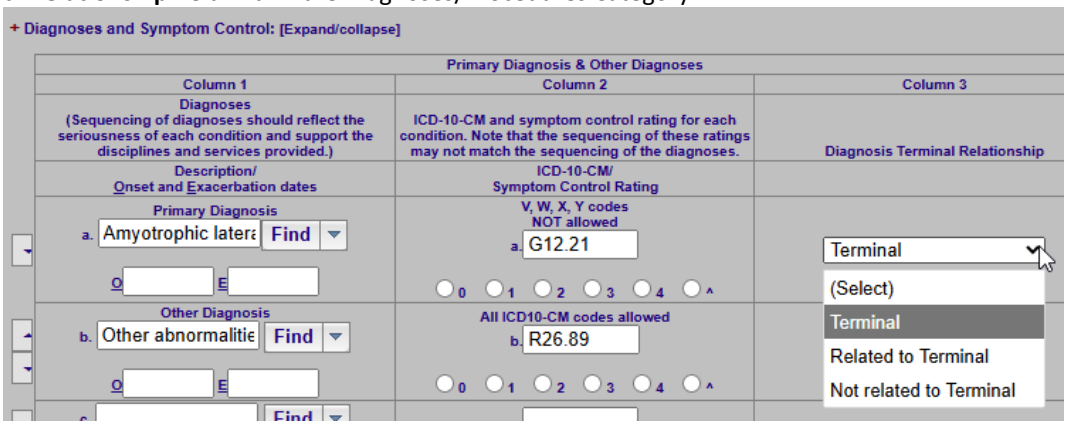
### *Related Fields*

Within the charting fields, users will see the following:

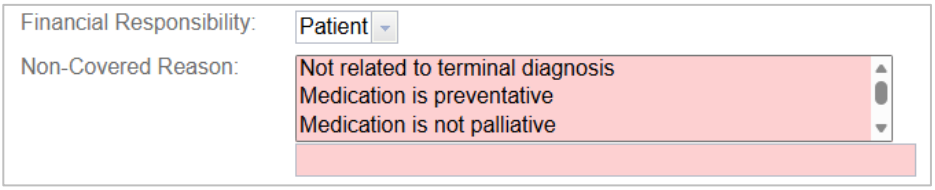
**Non-Covered Services and Items** found under the Eligibility/Recert Category:




**Diagnosis Terminal Relationship** field within the Diagnoses/Procedures Category:



**Non-Covered Reason** field within Patient Medications: This field is required when the Financial Responsibility option is set to an option other than Hospice.

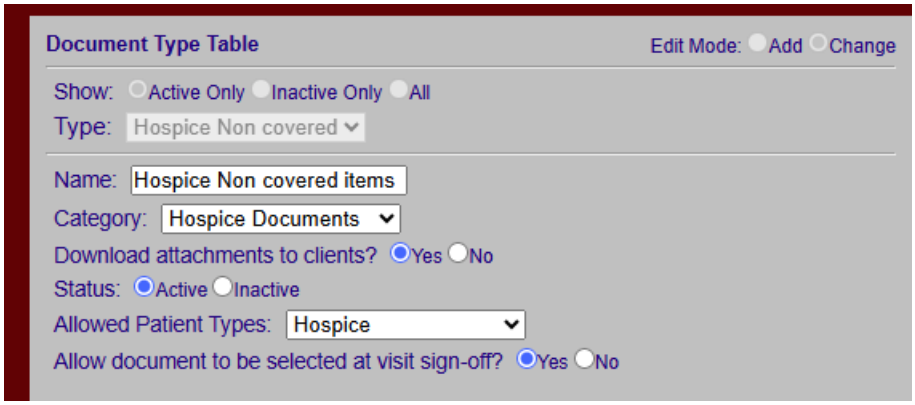



### *Related Tables (Administration>System>Tables)*

**Hospice Non-Covered Reasons** table allows agencies to define standard non coverage reasons for selection in the **Non-Covered Reason** field within the Patient Medications option.




**Document Type** table allows agencies to configure certain document types for managing within Document Library and Document Tracking functionality.



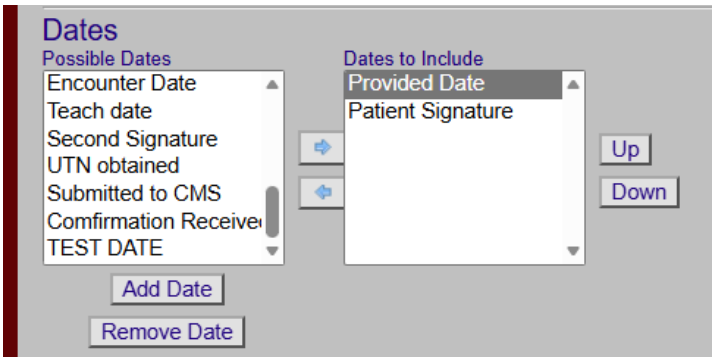

Refer to the Managing Documents Library and Document Tracking documentation found in the Thornberry Knowledgebase here: https://www.thornberryltd.com/documentation/document-library-and-document-tracking-functionality for specifics related to each of the fields, but the recommendation for creating a Hospice Not Covered Items Document are as follows:

- **Edit Mode:** Click Add in the upper right corner to create a new document
- **Name:** Enter a preferred name for the new document type (e.g., Hospice Non Covered Items).
- **Category:** Display the name of an existing category linked to the document or choose a category to associate with the document type.
- **Laptop/Client Device Access:** Choose whether the document is to go down to the laptops. Attachments for a document entry only get set up for download to a client laptop during a sync if the option Download files to client is set to Yes.
- **Allowed Patient Types:** Set this to Hospice to ensure the document is not set up for home health record.
- **Visit Signature Capture:** The Allow document to be selected at visit sign-off? option determines whether or not the document can be used as a valid document for a Visit Signature Capture at visit sign-off.

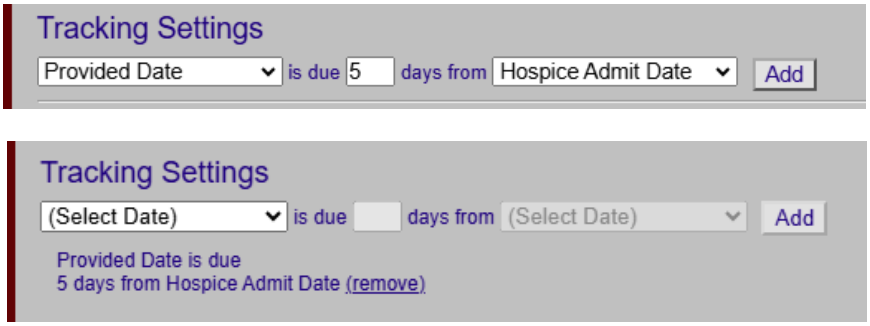
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**DATES**: Agencies can determine which dates will apply to this documentation and will be visible within the Document Library edit window.

***NOTE*:** These are dates that can then be used for tracking purposes.

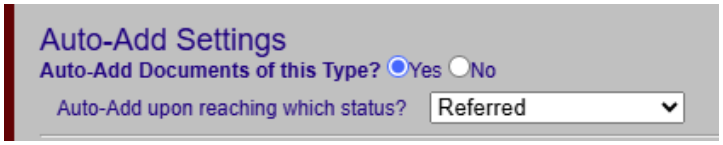



**TRACKING SETTINGS:** These settings are designed to manage the document(s). Select a specified date and the number of days from one of the options for the purposes of tracking (e.g. Provided Date is due 5 days from Hospice Admit Date). Click **Add** to save the selection to then confirm the tracking dates are confirmed as shown on the left.




***NOTE*:** Tracking functionality ONLY applies if a document exists. The Auto-Add option explained below can be used to automatically set up a document. If not, then agencies must adopt a workflow to ensure that a document is added to Document Library manually.

**AUTO-ADD SETTINGS**: Determines if a document of this type is automatically added to the patient's record when certain patient status has been achieved (e.g., Referred or Admit Status). The status must be designated.



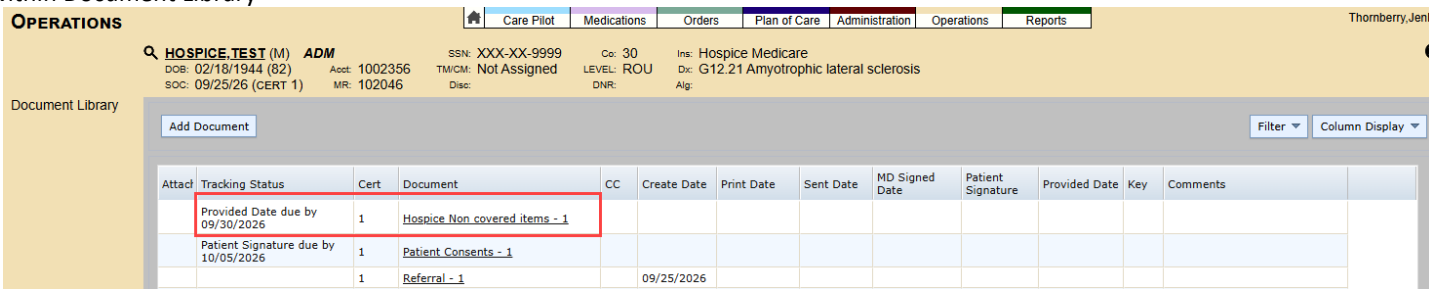

***NOTE*:** The following are important reminders for this option:

- Auto Add can automatically add the document entry within Document Library to ensure tracking can be managed based on the existence of a document.
- A patient must have the Referral filed as complete prior to the Admit to Hospice option moving the patient to ADM if Referred is used as the Auto-Add trigger.

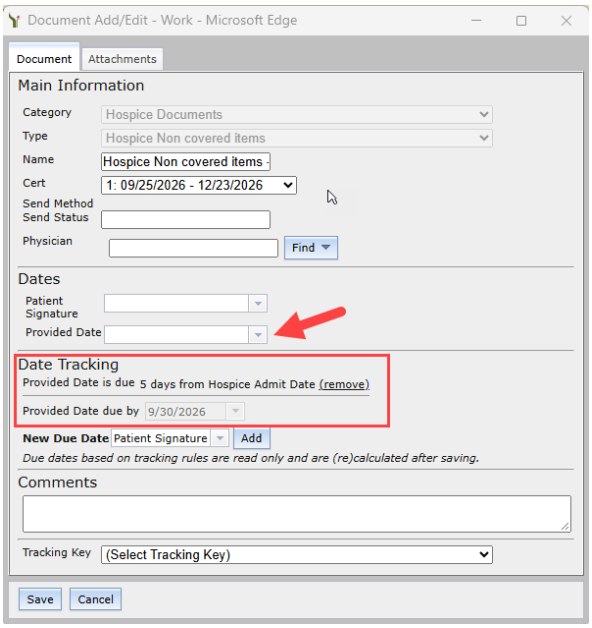
## Tracking Guidance

### *Document Library*

When the agency's designated Non-Covered Items document is present within the patient's record, users will see the document within Document Library



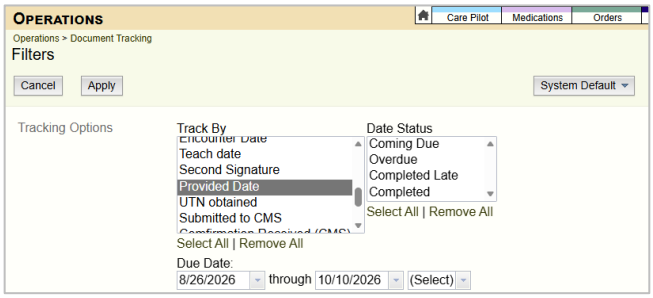
The Document Edit window displays the date options as well as the Date Tracking guidance.

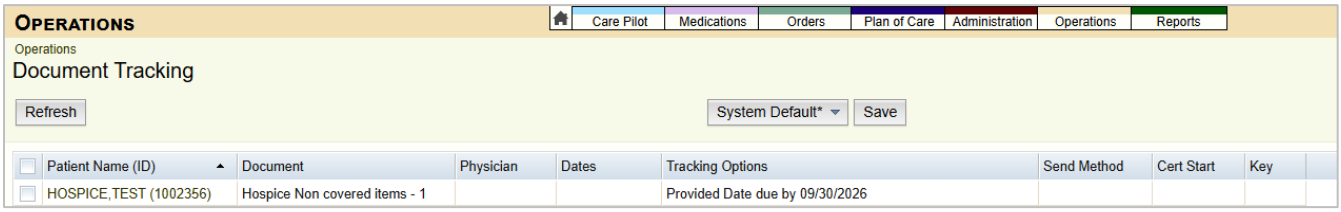



### *Document Tracking*

Agencies can use the Document Tracking function (Operations>Document Management) to track these documents.

***NOTE*:** The Date used for the Tracking Settings within the Document Type table will need to be the **Track By** date used for generating results (e.g., Provided Date). The Due Date range will need to encompass past and future dates to ensure documents are tracked accurately.




## Producing the Hospice Non-Covered Items, Services and Drugs Listing

The Hospice Non-Covered Items, Services and Drugs Listing is a report that can be used as a tool to compile and supplement the agency's documentation. It can be used and included as an attachment to the agency's adopted documentation. The report is accessible within the Patient Summary Report Manager listing and under Batch Reports under Reports>Patient.

