DocLink
Physician Certification

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Hospice Physicians can certify or recertify multiple patients easily and efficiently using the DocLink App. Verbal certifications and Statements of Eligibility can easily and efficiently be recorded and hard copies printed for Attending Physician signatures, all from within the DocLink App.

I. Set Up

1. All hospice staff who will use DocLink must be set up in PIM (ADMIN/Persons or ADMIN/Physicians), have a PIM (single sign-on) login, and be designated as a "Hospice Employee" with the appropriate employee type.
2. Add credentials as appropriate. Credentials will be part of the electronic signature.
3. DocLink App must be set up for the hospice. This is completed by tech support as part of initialization of service.

II. Accessing the DocLink App

The DocLink App can be found in App Store

1. For Apple iPhone and iPad, download the "HB-DocLink" App.
2. Once downloaded, click the DocLink icon, log in, and proceed to view list of patients needing certification.

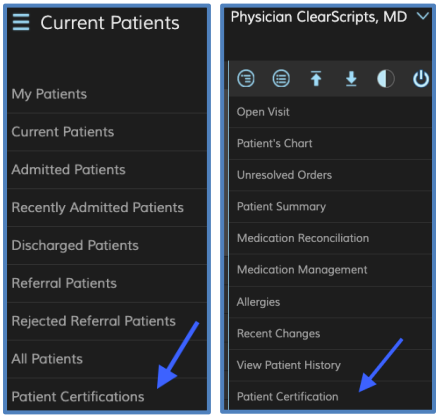
From within PIM

2. Log in to PIM.

3. Click the “Physician Certification” icon located in the top navigation bar.

From within C2

1. Log in to C2.
2. Navigate to the left drawer to the “Patient Certifications” link to access the entire list.

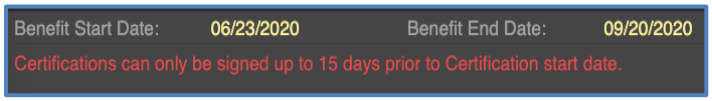


3. Navigate through the right drawer while in an individual patient chart to access the cert card for an individual patient.

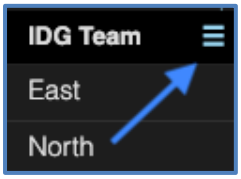
III. Using the DocLink App for Patient Cert/Recertifications

A. Navigation

1. Once in the App, a list of admitted patients due for certification or recertification will open. Patients will not show on the list in a referral status. Patients must have an admission date entered in order to certify. The list will show patients up to 30 days prior to a new benefit start date, but only those who fall within the certification signature window can be certified. (Per regulation, certification cannot occur more than 15 days prior to benefit period start date.)

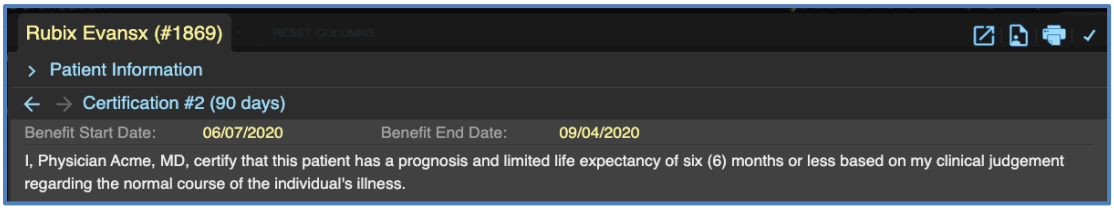


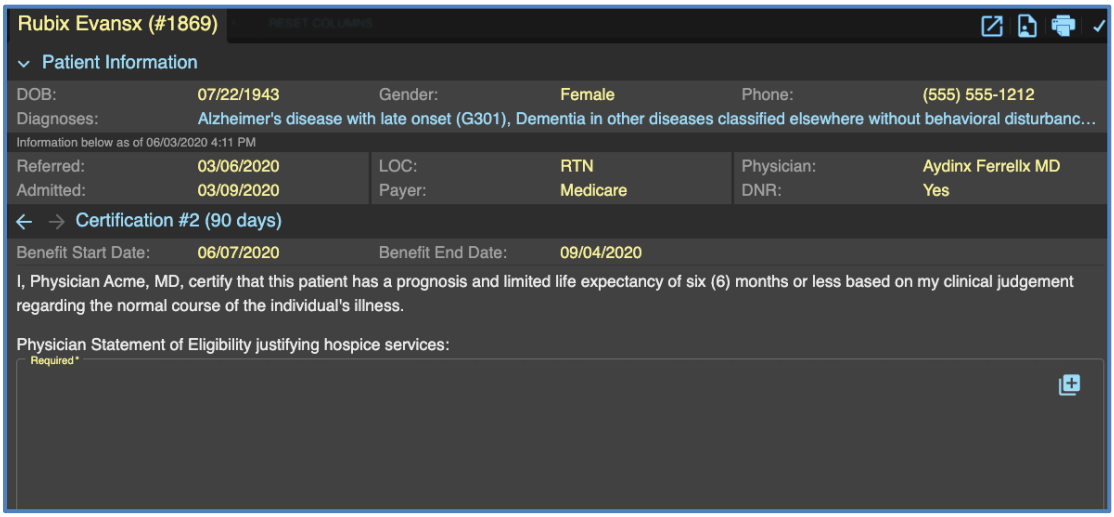
2. Patients can be sorted by clicking on the title of any column or filtered using the three-line icon to the right of each column name.



3. The column "F2F" will display whether the face-to-face visit, if required, has been completed. **Note**: If a F2F is required but has not yet been completed **in the system**, the Hospice Physician will be unable to complete a recertification for that patient.
4. Clicking the icon to the right of the patient's name will open the patient's clinical chart for review.

5. Choose a patient by clicking on the row.
6. The certification/recertification card opens. The document contains a summary of patient demographic and benefit period information, as well as the appropriate attestation statements. This area can be collapsed by clicking the arrow to the left of the patient name (see collapsed and expanded, below).





7. Icons on the bottom of the screen will allow the user to:
   a. Access patient chart.

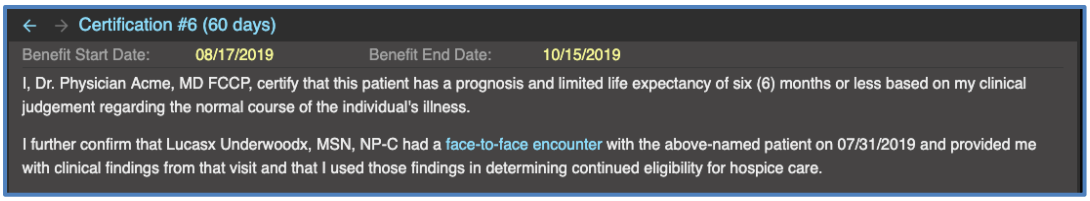
b. Access patient facesheet.

c. Print the re/certification.
This icon will allow other hospice staff (nursing, medical records) to access a printable version of the document for use with physicians who do not use the PIM/C2 programs, such as attending physicians.

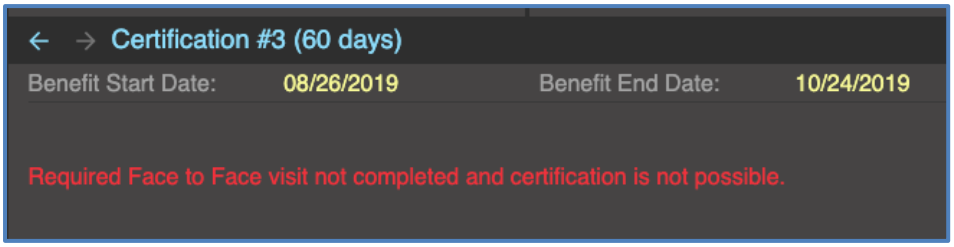
d. Checkmark icon (top right corner) will close the window.

B. Hospice Physician Usage for Certification/Recertification

1. Hospice Physician will log into DocLink and choose a patient.
2. Hospice Physician's name & credentials will auto-populate the certification card.
3. Certifications, where a F2F is required and completed, will populate with the name and credentials of the provider who completed the F2F visit and the date of the visit.



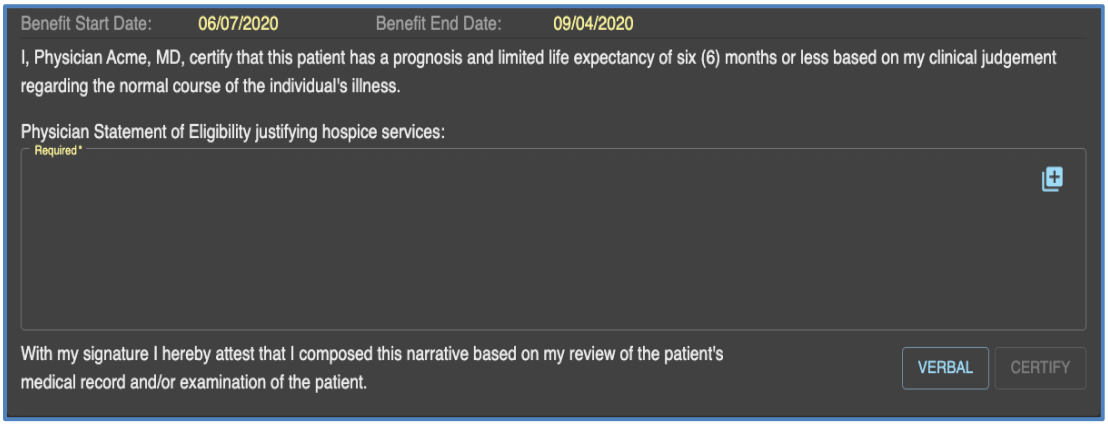
When the "face-to-face encounter" has been completed in the system this phrase will be a hyperlink (indicated in blue). Clicking the hyperlink will direct the Hospice Physician to the face-to-face clinical note for his/her review. **Note**: Where a F2F is required but not yet entered, the program will not allow the Hospice Physician to complete the documentation.



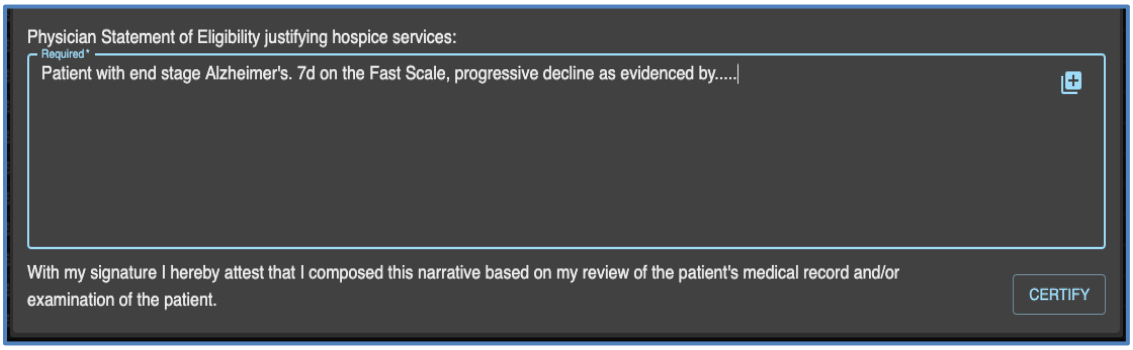
4. Clicking the back arrow (seen in the above screenshot to the left of the Certification #) takes the Hospice Physician to the previous certification (if applicable) to review the patient's prior condition and more easily document the patient's declining condition and changes.
   a. Copy Text icon in the narrative box can be used to copy a phrase from previous statements and paste into current certification statement. NOTE: CMS does not allow the Statement of Eligibility to be copied/pasted from one cert period to another. However, a "phrase" copied out of one Statement and pasted to the next would probably be allowed.

b. Clicking the forward arrow will return the Hospice Physician to the current certification period.

5. If only a verbal is being given at this time, the Hospice Physician can click the **Verbal** button (without entering a Statement of Eligibility) and the system will document the **Verbal** as complete. The statement will need to be entered at a later date for complete certification.

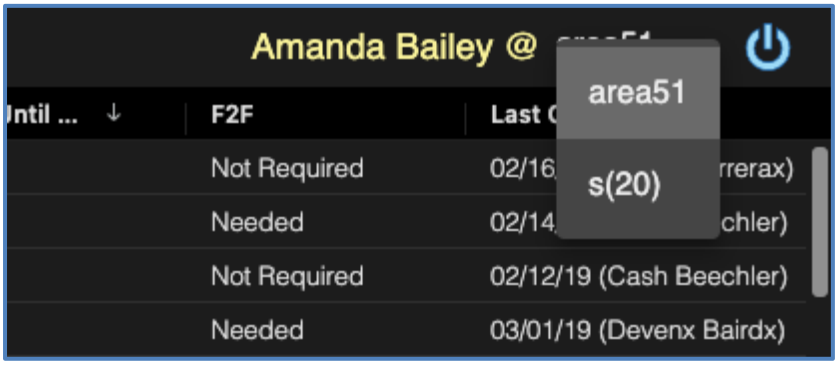


6. The date the verbal was marked will populate into the card and, simultaneously, the date and Hospice Physician name will be entered into the certification record in PIM under the "Insurance" tab/Elections/Hospice Physician field. **Note**: the patient's name will continue to display on the certification listing until the full certification is complete.
7. If ready to certify, Hospice Physician will click directly into the narrative statement text box (which is a required field) and enter a Statement of Eligibility. **Note**: If verbal has been completed only the **Certify** button will be present.
8. Once the Statement of Eligibility field is complete, clicking the **Certify** button causes the document to be electronically signed with the Hospice Physician's name, credentials, and date of certification.



9. Hospice Physician name and date of certification will simultaneously be entered into the certification record in PIM under the "Insurance" tab/Elections/Hospice Physician field.
10. A floating window will appear showing certification is complete. Clicking the checkmark in the top right corner of the card will close the card and the patient name will fall off the listing.

11. Providers with access to more than one location can toggle between locations by selecting the drop-down arrow next to their name and clicking on the desired location.

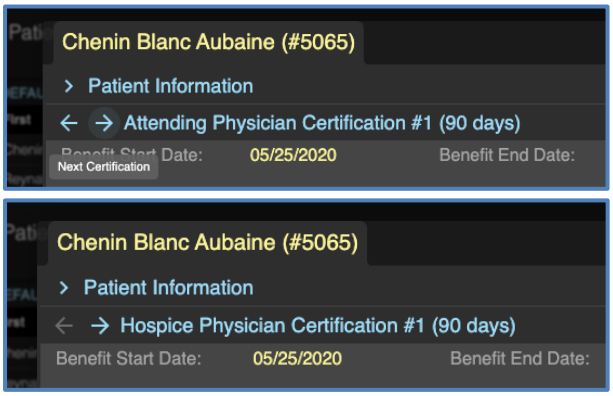


C. Non-Physician Usage

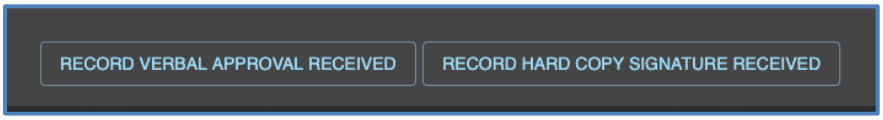
1. Entering Verbal Certifications

a. Verbal certifications for either the Attending Physician or the Hospice Physician must be entered into the DocLink App by the person receiving the verbal (if not entered directly by the Hospice Physician).
   i. Log in using one of the avenues listed above.
   ii. Choose the patient by clicking on the row.
   iii. The certification/recertification card opens.

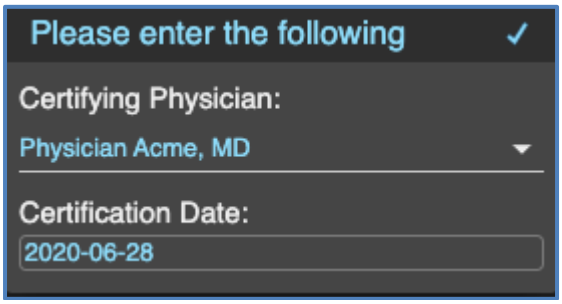
b. For new admissions, there are two cards for the patient (Hospice Physician Certification card and Attending Physician card)
   i. Use the left-right arrows to switch from one to the other (see below, arrows below "Patient Information".



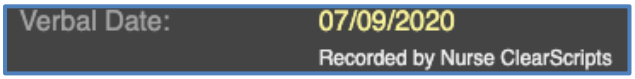
   ii. Once the correct card is chosen, two buttons will display at the bottom, "Record Verbal Approval Received" and "Record Hard Copy Signature Received".



c. To record verbal for the certification listed on this card, select “Record Verbal Approval Received”.
d. On the “Attending Physician” card, the physician on record in PIM as “Attending Physician” will prepopulate and cannot be changed. (If incorrect, user must change the “Attending Physician” in PIM.)



e. The date will default to the date of referral (or 15 days prior to admission date if the referral was greater than 15 days ago) and current date for recertifications. The date can be changed to up to 15 days prior to benefit start date or 2 days after by clicking in the date box and selecting from the date picker.
f. On the “Hospice Physician” card, one of the hospice’s medical directors will default; the down-arrow will bring up a list of physicians employed by the hospice to choose from.
g. On either card, once the physician and date are selected, click the checkmark to close the window and complete.
h. The date, name, and credentials of the person entering the verbal will appear on the cert card; therefore, the person entering the verbal should always be the person who received the verbal.



i. The physician name and date of verbal certification will simultaneously enter into PIM under the “Insurance” tab/Elections/Hospice Physician or Attending Physician field.
j. If the hospice physician will act as the attending and “No Attending” has been selected under Attending Physician in PIM, the cert card will indicate that an attending cert is not needed.

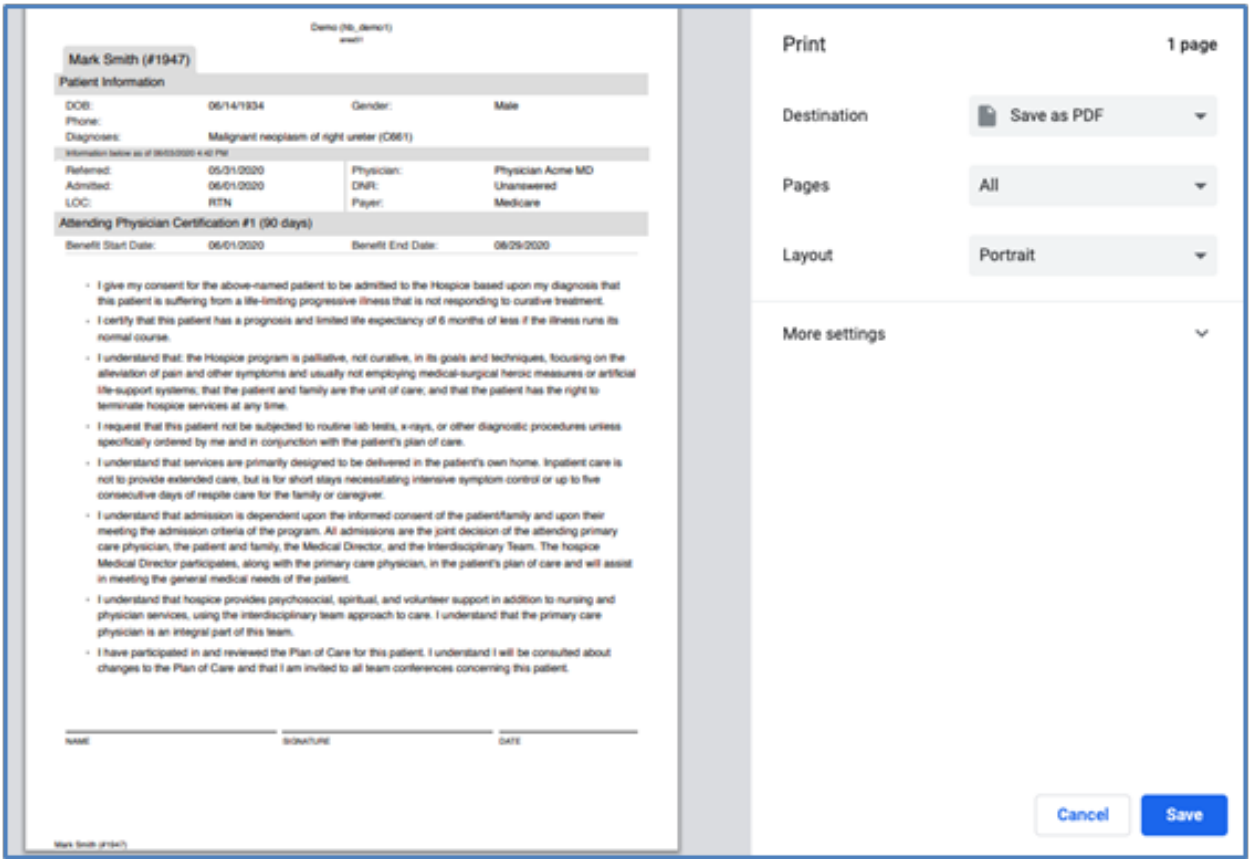
2. Recording Hard Copy Signature

Used when the Attending physician has signed the initial certification by hard copy signature. Non-Physician user will follow the procedure above except will click “Record Hard Copy Signature” to enter the date that the document was signed. Simultaneously, the Attending and date of signature will be entered into the Certification Record in PIM/Insurance/Elections/Attending Physician field.

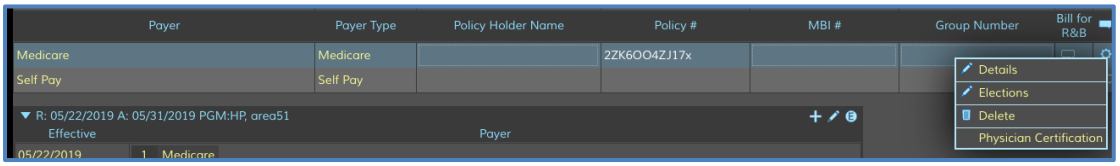
3. View and Print

a. Print the card with signature and date lines right from the card by selecting the printer icon in the bottom right corner.

b. This copy can be printed and submitted to the Attending for hard-copy signature.

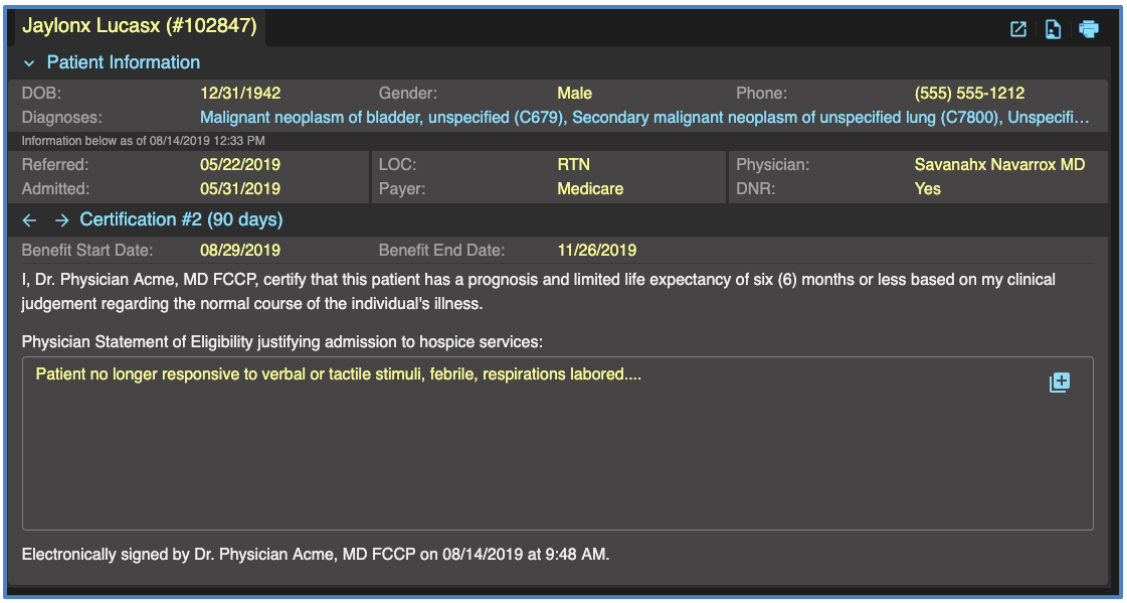


c. To view/print a certification after it has been completed:
   i. Access the patient chart in PIM.
   ii. Select the Insurance tab.
   iii. Select the gear next to the appropriate payer and select Physician Certification.

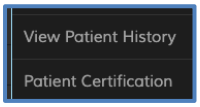
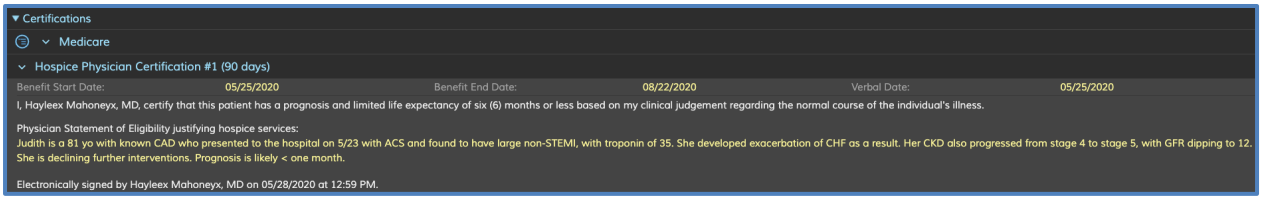


This will open a window in the physician certification area with the next certification due displayed.

d. Clicking the back arrow to the left of the Certification # will display prior certs to view or print.



The process can also be accomplished by **accessing the cert card in C2** while in a patient chart by selecting **"Physician Certification"** from the right drawer.



Users can also view Signed Certs, Verbal Certs, Election Start and End Dates, Attestation Verbiage, including Face-to-Face information where applicable, the Physician Narrative justifying certification, and the Physician E-Signature with Date and Time by accessing the View/Print Patient History function.