

# PDGM Preparedness Checklist

## ☐ PDGM Impact Analysis

- Perform an initial analysis of how your agency would perform financially under PDGM using the [CMS Impact File](#)
- Use the [CMS Grouper Tool](#) to conduct an analysis of financial performance, considering your average patient population and common primary diagnoses

## ☐ Coding Accuracy Review

- Analyze a sampling of patient records of relevant size to your agency to determine necessary modifications to accommodate with new coding guidelines
- Evaluate whether any claims would be considered questionable encounters secondary to incorrect coding and implement training materials with referral sources to receive an allowable primary diagnosis at time of referral
- Review training for clinicians and coders to include supportive documentation for all diagnoses and co-morbidities relevant to the plan of care

## ☐ Review Your Agency's LUPA History

- Analyze how often episodes would result in a LUPA if PDGM were in effect now
- Understand which common patient classifications would trigger LUPAs based on the care your agency currently provides
- Review patient detail at intake to determine if patient classification and LUPA threshold can be identified
- Implement tracking, reconciliation and timely documentation requirements now that will allow your agency to properly manage LUPAs beginning in 2020

## ☐ Review Case Conference Format

- Determine if your current format needs revision to increase both clinical care coordination and office-based coordination to accommodate PDGM requirements

## ☐ Intake & Billing Procedure Review

- Determine procedures that need to be streamlined to accommodate 30-day payment periods
- Scrutinize billing department processes and staffing and ensure staff are fully trained to gather the information necessary to determine the HIPPS code for each episode including:
  - Complete accurate diagnosis
  - Episode timing (early or late)
  - Referral source – where patient was within previous 14 days
  - History & physical
  - Interdisciplinary collaboration to determine functional status
  - Physician who will be signing face to face & future orders
  - Where to access additional patient information
- Automate processes to handle the rigorous pace of PDGM will require and consider hiring additional billing staff

## ☐ Evaluate Your EMR

- Proactively meet with your electronic medical records (EMR) vendor to determine PDGM readiness and automated features that will facilitate your agency's success
- Ask for details on expected changes, timeline for those changes, and if you can provide feedback on what is being developed

To learn more about our approach to PDGM, contact us at [homehealth@healthpro-heritage.com](mailto:homehealth@healthpro-heritage.com)