

# Hospice Regulatory Boot Camp



TIME (Local)	Day 1 Agenda • Monday 2026 START: 8:30 AM Local Time		OVERVIEW
8:30–8:40 (10 min PPT) (NO Q&A)	<b>Welcome to Hospice Regulatory Boot Camp</b>  Presenter: Carrie Cooley		Introductions and announcements
8:40-9:10 (30 min PPT) (NO Q&A)	1.	<b><i>The Conditions of Participation (CoPs) versus the Conditions for Coverage/Payment and Introduction of Case Studies</i></b>  Presenter: Carrie Cooley	Discussion of the Conditions of Participation (CoPs) versus the Conditions for Coverage/Payment and introduction of 3 case studies to be used throughout the three days of training.
9:10-10:15 (55 min PPT) (10 Q&A)	2.	<b><i>The Hospice Election and Admission Processes</i></b>  Presenter: Dr. Lauren Templeton	Hospice admission is a <u>process</u> – not an event! This course will detail the operationalization of the regulatory requirements (e.g., technical and clinical) of hospice election and the roles of hospice team members during the hospice election and admission process.
<b>10:15-10:30</b>	<b>BREAK (15 MINUTES)</b>		
10:30-11:45 (65 min PPT) (10 Q&A)	3.	<b><i>Assessment of the Patient and Family Throughout the Course of Hospice Care</i></b>  Presenter: Colleen O’Keefe	Detailed review of the regulations governing the assessment of the patient/family throughout the course of hospice care. Regulatory and documentary compliance will be demonstrated via the 3 case studies.
<b>11:45-12:45</b>	<b>LUNCH (60 MINUTES)</b>		
12:45-1:55 (60 min PPT) (10 Q&A)	4.	<b><i>The Interdisciplinary Group (IDG): Care Planning and Coordination of Care</i></b>  Presenter: Colleen O’Keefe	Discussion of the regulatory requirements and operationalization of patient/family care planning, care coordination, and documentation of IDG meetings. Regulatory and documentary compliance will be demonstrated through the 3 case studies.
<b>1:55-2:10</b>	<b>BREAK (15 minutes)</b>		
2:10-3:20 (60 min PPT) (10 Q&A)	5.	<b><i>Risk Mitigation for the Comings and Goings of Hospice Patients</i></b>  Presenter: Carrie Cooley	Navigating the nuances, complexities, and documentation associated with hospice live discharges. This course will also focus on risk mitigation for hospice “revolving door” patients. Regulatory and documentary compliance will be demonstrated through the 3 case studies.
3:20-4:30 (60 min PPT) (10 Q&A)	6.	<b><i>The Engaged Hospice Physician</i></b>  Presenter: Dr. Lauren Templeton	Discussion of the clinical and administrative responsibilities of an engaged hospice physician and recommended documentation practices. Detailed discussion of the hospice physician’s prognostication decisions and documentation responsibilities.

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TIME (Local)	Day 2 Agenda • Tuesday 2026 START: 8:30 AM Local Time		OVERVIEW
8:30-9:40 (60 min PPT) (10 Q&A)	7.	<b>Higher Levels of Care: General Inpatient (GIP) and Continuous Home Care (CHC)</b>  Presenter: Colleen O’Keefe	Regulatory and payment requirements to support payment for the general inpatient (GIP) level of care and the continuous home care (CHC) level of care. Regulatory compliance will be demonstrated through the 3 case studies.
9:40-10:45 (45 min PPT) (20 Q&A)	8.	<b>Relatedness Determinations: A to Z</b>  Presenter: Dr. Lauren Templeton	Examination of the regulatory framework for hospice relatedness determinations; will also examine medication management and recommended documentary practices to mitigate payment-related risk. Regulatory and documentary compliance will be examined through the 3 case studies.
<b>10:45-11:00</b> <b>BREAK (15 MINUTES)</b>			
11:00-12:00 (50 min PPT) (10 Q&A)	9.	<b>Becoming a Five Star Hospice: Scores that Matter</b>  Presenter: Colleen O’Keefe	Discussion of how to use Quality Assessment and Performance Improvement (QAPI) data to foster excellent patient outcomes and positively influence quality scores
<b>12:00-1:00</b> <b>LUNCH (60 MINUTES)</b>			
1:00-2:00 (50 min PPT) (10 Q&A)	10.	<b>Medicare Spending Outside the Hospice Benefit</b>  Presenter: Dr. Lauren Templeton	Examination of the current payment-related scrutiny of Medicare payments made to non-hospice providers. Discussion of operational processes and documentary practices to mitigate payment-related risks and recoupment from CMS. risk mitigation and operational
<b>2:00-2:15</b> <b>BREAK (15 MINUTES)</b>			
2:15-4:00 (90 min PPT) (15 Q&A)	11.	<b>CMS Contractor Audits</b>  Presenter: Carrie Cooley	Discussion of current audits (e.g., TPE, UPIC, RA, SMRC, etc.) being conducted by various CMS contractors. Discussion of initial response, submission timelines, documentation submission, and appeal strategies.

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TIME (Local)	Day 3 Agenda • Wednesday 2026 START: 8:30 AM Local Time		OVERVIEW
8:30-9:40 (60 min PPT) (10 Q&A)	12.	<b>Local Coverage Determination (LCD) Guidelines: CGS, NGS, and Palmetto</b>  Presenter: Dr. Lauren Templeton	An in-depth review of Local Coverage Determination (LCD) guidelines and their utilization in clinical record documentation. Documentary recommendations for all IDG members will be demonstrated using the 3 case studies.
<b>9:40-9:55</b>	<b>BREAK (15 MINUTES)</b>		
9:55-10:55 (50 min PPT) (10 Q&A)	13.	<b>Hospice Assessment Tools</b>  Presenter: Colleen O’Keefe	A detailed explanation of the proper utilization and documentation of the most common hospice assessment tools (e.g., ADLs, FAST, PPS, NYHA) to evaluate and document a terminal disease trajectory throughout the course of care. Documentary recommendations for all IDG members will be demonstrated using the 3 case studies.
10:50-12:00 (50 min PPT) (10 Q&A)	14.	<b>Documentation Superpower: Demonstrating Terminality with Comparative Documentation</b>  Presenter: Carrie Cooley	A detailed explanation of how to utilize comparative data to demonstrate terminal disease progression in clinical record documentation. Regulatory compliance will be demonstrated through the 3 case studies.
<b>12:00-1:00</b>	<b>LUNCH (60 MINUTES)</b>		
1:00-2:10 (60 min PPT) (10 Q&A)	15.	<b>Drafting Compelling Physician Narrative Statements</b>  Presenter: Dr. Lauren Templeton	A detailed explanation of the methodology for drafting compelling physician narrative statements that clearly demonstrate a patient’s terminal prognosis and are sufficient to support claim payment.
<b>2:10-2:25</b>	<b>BREAK (15 MINUTES)</b>		
2:25-3:10 (35 min PPT) (10 Q&A)	16.	<b>Weatherbee’s Recipe for Excellent Clinical Record Documentation</b>  Presenter: Colleen O’Keefe	An in-depth explanation of how to utilize all the clinical record documentation “ingredients” to create concise and comprehensive documentation of terminally ill pat
3:10-4:00 (50 min PPT) (No Q&A)	17.	<b>Taking Boot Camp Home: Next Steps to Improve Organizational Compliance and Mitigate Payment-Related Risk</b>  Presenter: Carrie Cooley	A step-by-step guide to conducting a post-Boot Camp organizational risk assessment, sharing new knowledge with hospice colleagues, and creating a plan to mitigate identified compliance and/or payment-related risk areas.