Netsmart

HOPE Readiness Checklist
Preparing for the Hospice Outcomes and Patient Evaluation Tool

The HOPE (Hospice Outcomes and Patient Evaluation) tool marks a major shift in how hospice agencies assess patient needs, document care and demonstrate quality. Use this readiness checklist to ensure your organization is fully prepared for implementation on October 1, 2025.

HOPE resources, webinars, FAQs and more!

Check out our HOPE Success Center

1. HOPE Transition Preparation		
	☐	Designate a HOPE Readiness Champion or Project Lead
	☐	Review CMS guidance and training materials on HOPE (latest updates on the CMS HOPE website)
	☐	Communicate HOPE implementation plan across leadership and interdisciplinary teams
	☐	Assess current workflows and documentation processes that will be affected by HOPE

2. Staff Training and Education		
	☐	Enroll staff in HOPE training modules and review updated guidance documents
	☐	Provide internal education sessions for IDG staff (RN, LPN, SW, Chaplain, Aide, Physician) on HOPE intent and impact
	☐	Train clinical staff on conducting structured HOPE interviews and assessments
	☐	Prepare teams for scheduling changes to accommodate additional HUV and SFV visit types and specified timeframes
	☐	Include HOPE competencies in onboarding and annual education plans

3. Data and Documentation Preparation		
	☐	Review your EHR and ensure it is equipped to document HOPE and capture the required items
	☐	Identify where HOPE items overlap or replace existing documentation fields
	☐	Validate systems for capturing new structured data and transmitting to CMS (QIES to iQIES transition)
	☐	Establish audit processes to review HOPE documentation accuracy and completeness, including ICD-10-CM coding

4. Workflow and Process Alignment	☐	Integrate HOPE assessments into admission and recertification workflows
	☐	Define responsibilities for completing, reviewing and submitting HOPE assessments
	☐	Test documentation timelines to ensure compliance with HOPE data collection intervals
	☐	Develop protocols for symptom follow-up and care planning linked to HOPE items

5. Performance Monitoring and Quality	☐	Set up internal reporting and dashboards to track HOPE-related metrics
	☐	Monitor impact of HOPE data on care planning and outcomes
	☐	Establish ongoing review of staff performance on HOPE assessments
	☐	Stay updated on future rulemaking and public reporting related to HOPE

Navigate the transition to HOPE with experts by your side.

From workflow optimization and simplified iQIES and CMS submissions to documentation accuracy and staff training, our team is here to support you.

Netsmart

Navigate HOPE with an EHR built to support your team.

SCHEDULE A DEMO TO LEARN MORE

McBee

Integrate HOPE smoothly with expert support and education.

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Simple

Avoid rejections and late submissions during the HOPE-iQIES transition.

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