



Standing Agreement Regarding Scope and Expectations

Practice / Organization Name:

Role Described:

Example: Medical Assistant

Targeted Population:

Examples: Patients who are discharged from the hospital, who visit the emergency department, who have gaps in care, who could benefit from self-management support.

Scope of Services: *(Insert additional Services as needed)*

Examples could include:

- Call patients within 48 business hours of discharge from the hospital to coordinate care.
- Call patients within 48 business hours of notification of an emergency department visit.
- Conduct patient assessments including: PHQ-9, Social Needs Assessment
- Call patients with identified gaps in care to support overall quality efforts, providing direction for completing any necessary tests/labs or scheduling an appointment with the provider.
- Serve as a point of contact, advocate and informational resource for patient, family, care team, payers, and community resources
- Cultivate and supports co-management with primary care/or subspecialty making referrals, reports and summaries as identified
- Completes concise, timely written documentation within medical record

Medical Emergency:

In the event of a medical emergency, follow the *(Insert: Practice/Organization Name)* medical emergency protocols.

Provider Name, Signature & Credentials: *(Insert here)*

(This may vary based on organizational structure. It is highly recommended that either a Medical Director or Physician/Practice leader sign on behalf of all providers.)

Date(s):