



Care Management: What Does Embedment Look Like?

Introduction to Practice

1. Indicate the staff in your office and describe their role (i.e. RN, MA etc.)
2. Identify practice communications and who is involved.
 - a. Huddles
 - b. Electronically –EMR, instant message
 - c. Scheduled meetings
 - d. Communication Boards
 - e. Portal, texting ect.
3. Identify the practice documentation system (EMR).
4. Identify practice policies, protocols, pathways, guidelines that guide care.
5. Identify practice hours/extended hours and access to care after hours.
6. Identify team members involved in delivery of care management and population health.
7. Does the practice/CM have standardized educational materials?

Establishing Case Load

1. Describe how you introduce yourself as CM to the practice staff and patients.
2. Does office staff know criteria for patients who would potentially benefit from care management and the process to refer to the CM?
 - a. Appointment for exacerbation or additional symptoms
 - b. Abnormal lab – gaps in care
 - c. Referral to specialist, feedback loop when patient sees a specialist / referral
 - d. Same day appointments
3. Do the staff identify eligible/potential care management patients in advance of scheduled visits?
4. Can the staff identify patients in the care manager's caseload? (active case load)
5. Can staff alert the CM when patient has appointment with PCP?
6. Does the staff know CM's schedule for the day?
7. Does CM receive or altered to specialists consult reports?
8. Does CM know when patient comes in for a same-day appointment?
9. Are other staff in the practice is involved in TOC? Are they referring patients?
10. Does CM meet with PCP/team on regular basis to discuss patient?



Handout

11. Does staff know how to reach you if you are not in the practice?
12. Does staff know where to access your documentation and plans of care, self- management goals?
13. What method(s) does CM use to communicate throughout the day with team members?
14. How does CM handle urgent patient issues? By whom and how are they identified?
15. Are CMs alerted to after hour calls for their pts? Does CM inform the patient at each visit about after hour and weekend 24/7 access to a clinical decision maker/PCP?
16. Does CM have extended hours and accessibility to meet the needs of the patient population?

Creating efficiency and measuring outcomes

1. Does the CM have access to quality metrics, gaps in care reports, billing/rejection reports?
2. Does the CM monitor monthly productivity reports on new, active and closed cases?

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<http://www.improvingprimarycare.org/search/resources?keyword=practice+assessment>