** Small Practice Example**

**TC 02 - EXAMPLE**

Date: 08/15/2016

**Care Team Members Responsibilities**

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| Domain | Care Coordination | | Population Management | | Self-Management |
| **Role** | **Transitions Coordinator** | **Diagnostics Coordinator** | **Outreach/Recall** | **Care Management** | **Patient Education** |
| Qualifications/Position | Receptionists/MA’s | MA’s | MA’s + Receptionist’s | Physicians – MD’s, DO’s  NP’s, PA’s | MA’s, MD’s, DO’s, NP’s and PA’s |
| Essential Functions | -obtain previous medical record(s)  - get HIPAA release of information signed  -fax signed release of information to the previous provider  -check patients in and out  -obtain referrals authorizations and complete referrals preparations  - communicate with insurances regarding eligibilities, benefits, authorizations  -schedule urgent appointments with specialists  -assist patients in scheduling appointments with specialists, if necessary  -import into EMR immunizations from state registry (NYCIR)  -back enter immunization in EMR if patient not found in registry  -call specialists to obtain consultation reports (referral follow up) | . perform in-house labs (UA, pregnancy test, rapid strep test, rapid flu test, rsv test) according to standing orders or as instructed by MD  . take vital signs  -inform MD if abnormal vital signs  -perform EKG’s  -performs pulmonary function tests (spirometry)  -perform venipunctures and collect specimens  -prepare lab requisitions and specimen for lab pick up  -call labs to obtain pending lab results  -obtain ER/Hospital Admission lab results from RHIO or from hospital  -assist MD’s in diagnostic procedures | -recall patients to schedule Well -Child visits  -send electronic recall campaigns  -recall patients due for immunizations  -perform all other patient recalls as instructed by MD  -send electronic messages to patients for abnormal lab results  -send electronic messages to patient regarding normal lab results  -recall patients to schedule appointments as instructed by MD’s | -review medical record obtained from previous provider or brought in by patient  -reviews accuracy of information entered in EMR by MA’s and receptionists  -take history  -perform physical exams  -order diagnostic tests  -perform diagnostic procedures (ie bladder catheterizations)  -perform therapeutic procedures (i.e. cautherizations, im/iv injections, wound care, laceration repair and suture removal)  -administer immunization  -administer medications  -review and interpret lab results, x rays, ekg’s, spirometry  -review screening tests (vision, hearing)  -establish diagnosis  -send prescriptions electronically  -establish follow up need  -communicate with other providers  -uses EMR registry to obtain list of patients due for medical care | -evaluate health literacy of patient and families constantly  -provide verbal and written information on healthy life-styles  -provide verbal and written information on normal child development and milestones  -provide information on medications and other therapeutic modalities  -assess patient’s and family’s understanding on instructions given  -provide self-management tools and information on how to use it (i.e. asthma action plan, peak-flow meter use, diabetes self-monitoring card  - |
| Patient Outreach | -call patients to schedule appointment  after MD reviews medical record obtained from previous provider  -call patient to inform that referral has been authorized by insurance, and is ready for pick up or submitted electronically to the specialist | -call patients to schedule appointments for abnormal lab results management as instructed by MD’s  - | -call or send message to inform patient for due/overdue Well Child Visits and or Vaccines | -send electronic messages for abnormal lab results  -send electronic messages for normal lab results  -call patients with abnormal lab results if appropriate  -call patient for follow up evaluation as needed | -call patient to monitor treatment and illness course  -call patient/family when recently diagnosed with chronic medical condition to evaluate need for further education  - |
| Information Used | -information provided by patient or MD  -patient demographics available in EMR  -NYCIR information | -information provided by MD  -patient demographics available in EMR | -information provided by MD  -patient demographics available in EMR  -patient list provided by MD from the EMR’s registry capabilities | -information obtained from other providers  -patient EMR  -NYCIR information  -RHIO information  -information provided by insurance companies | -patient instruction material available in EMR  -vaccine information statements (VIS)  -patient education brochures and fliers  -patient self-management cards |
| Care Team Responsibilities | -organize all efforts  -timely appointments with appropriate specialists and other service providers | -enhance, support and expand the primary care services | -enhance, support and expand the primary care services | -assume leadership  -manage clinical aspects of care | -assume leadership  -manage clinical aspects of care |
| EHR documentation | -scan documents into patient’s EMR  -file faxes received in patient’s EMR  -record patient demographics in EMR  -record guarantor information  -import immunizations from NYCIR into patient’s medical record | -record telephone conversations in patient’s EMR  -document vital signs in EMR  -scans spirometry and EKG print out in EMR  -documents in-house lab results in EMR | -create telephone encounter to document phone conversations with patients, specialists offices, other facilities | -document history, physical exam, assessment, labs order, treatment, immunizations, need for follow up  -document telephone encounters with patients, other providers, other facilities | -documents information provided to patients  -document health literacy  -document patient understanding on treatment and management  -document self-management materials provided to patient |
| Quality Improvement | -maintain mandatory fields in EMR for comprehensive documentation | -monitor quality of specimen collection and act to reduce the number of low quality specimens | -monitor electronic messages sent to patients that were not followed by a phone call from patient, and call those patients to ensure message has been received  -implement QI initiatives and provide feedback on progress and identified barriers back to the team | -use suggestion box information for quality improvement  -use surveys to evaluate patient satisfaction and identify opportunity for quality improvement  -generate reports for clinical quality measures and identify opportunities for improved performance | -evaluate patient understanding on disease management to establish quality improvement modalities needed |