

Chronic Care Management Note

Effective, December 7, 2015, the department of Family Medicine will start billing for Chronic Care Management (CCM). The following is the note workflow.

Once a patient is identified as qualifying for CCM, a chart alert will be put in the system.

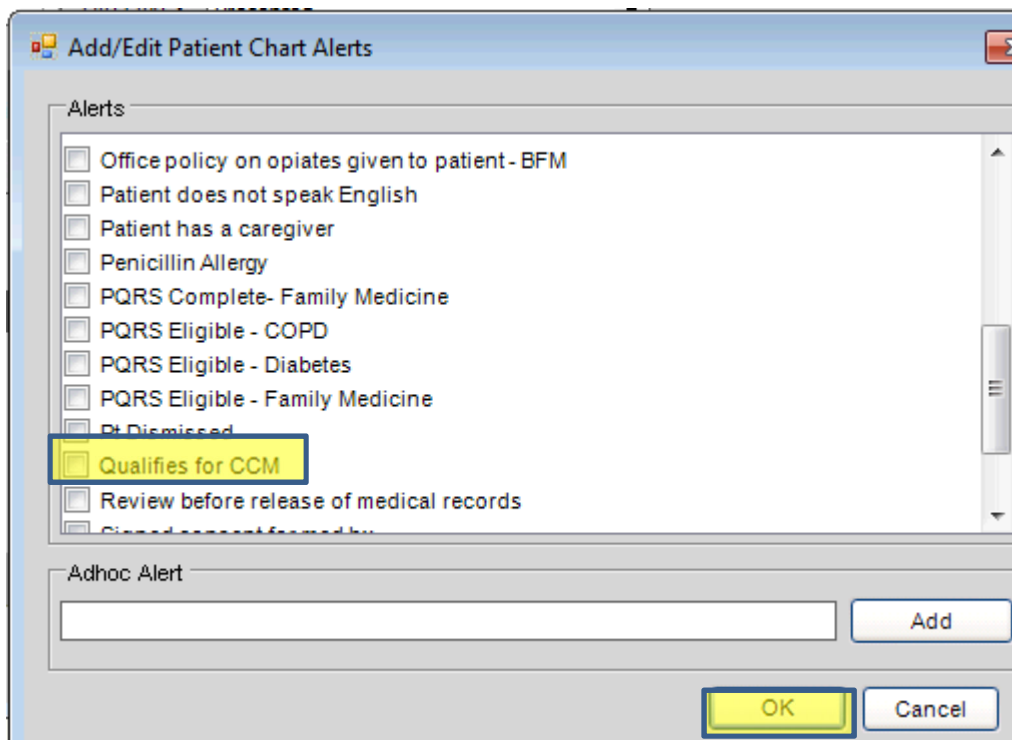


Click on the “i” in the **Patient Banner** and click **Add Alert**.

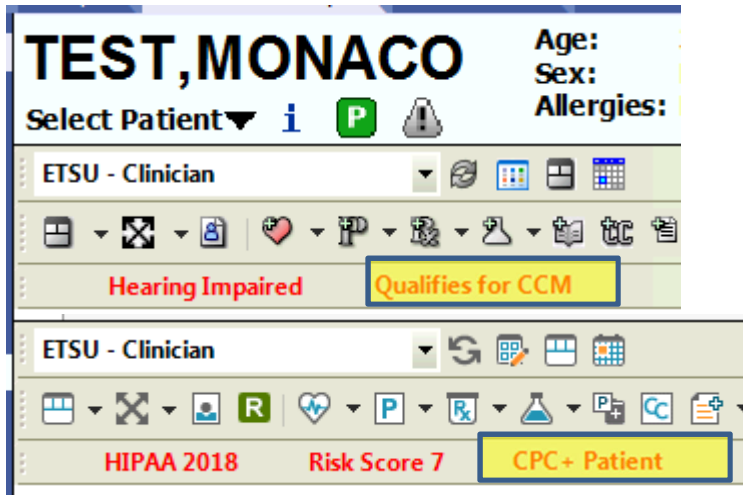
Chart Alert	Date Added	Remove
SBIRT due 7-1-16	13Jul2015	Delete
Blind Patient	06Sep2015	Delete
Hearing Impaired	06Sep2015	Delete

[ographics](#) | [Preferred Communication](#) | [Community Info](#) | [Employer/Contact](#) | [Insurance](#) | [Rx Benefit Pla](#)

The **Add/Edit Patient Chart Alerts** box pop up, choose **Qualifies for CCM** and click **OK**.

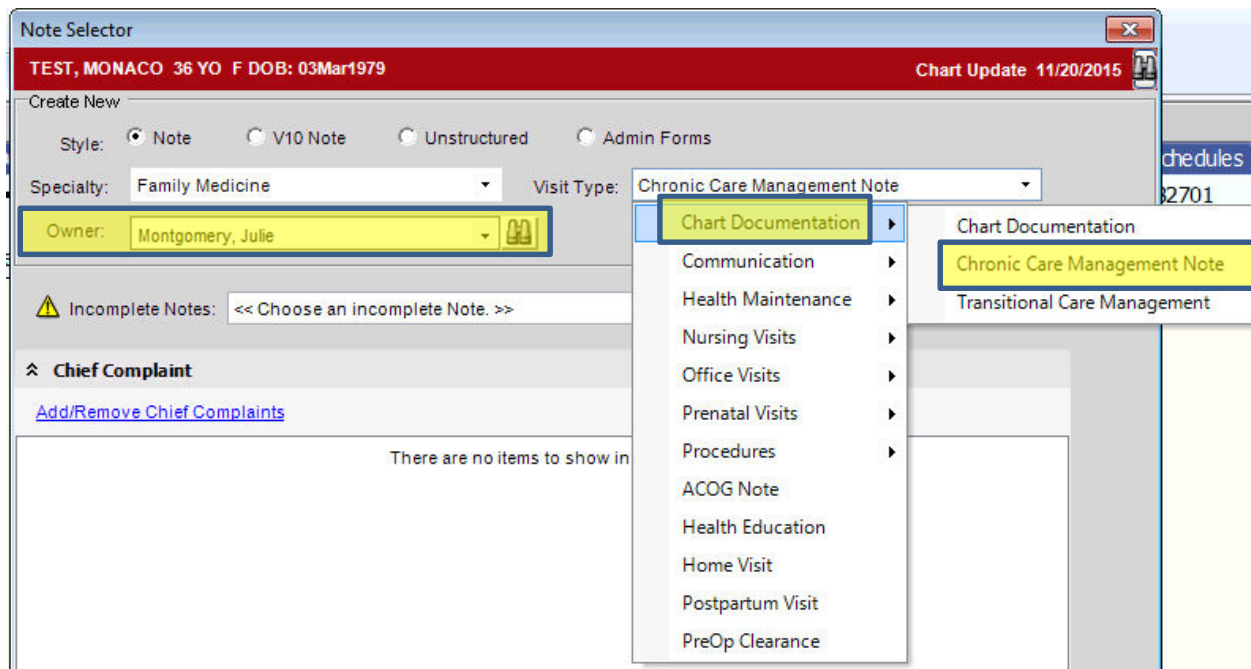


The Chart Alert will now show in the Banner. In addition, pay close attention to patient's who have been identified as a CPC+ patient. These patients will not participate in CCM.



The Chronic Care Management note can be found under **Visit Type** of **Chart Documentation**.

The **Owner** will be the **Care Manager**.



The first form that opens is the **Patient Agreement** form. This form only needs to be filled out at the initial visit.

Patient Agreement

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Patient Agreement

Patient agreement only needs to be filled out at the initial visit.

- The patient agrees to participate in the CCM services for the next 12 months
- Discuss concerns about taking medications with PCP or case manager
- Advise PCP if patient wants to stop medication, including reasons for stopping, and discuss potential alternatives
- Advise PCP of bothersome side effects from medications
- Advise PCP if new medications are added by other providers

The second form that opens is the **Time Spent** form. The first 2 questions must be filled out and by clicking the box, will result in the statement showing up in the note output.

The screenshot shows the 'Time Spent' form with several fields and checkboxes. A yellow box highlights the 'Consent Form Signed and Scanned in Chart' checkbox, which is checked. An arrow points from this box to a yellow callout box that says 'Checking this box will result in this statement in the note'. Another arrow points from the checked checkbox to a text box that says 'Time Spent: The patient signed a CCM consent form. It has been scanned into the chart.' A second yellow box highlights the 'Start time of phone call' field, which is checked and has '1:15' entered. An arrow points from this box to a yellow callout box that says 'Checking this box will result in a free text entry.'

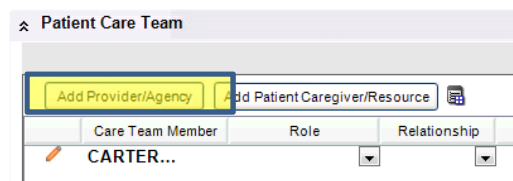
You may speak to the patient multiple times each month, you will enter data in each call section of this form and then total the minutes spent at the bottom of the **Time Spent** form.

Call 11

- Date: 7/30/18
- Start time of phone call: 1:0...
- End time of phone call: 1:1...
- Total time for month: 1 h...
- Total time of phone call: 15 minutes
- Time spent other than phone call: ____

The third form that opens is the **Concerns & Barriers** form. All sections in this form will be free text.

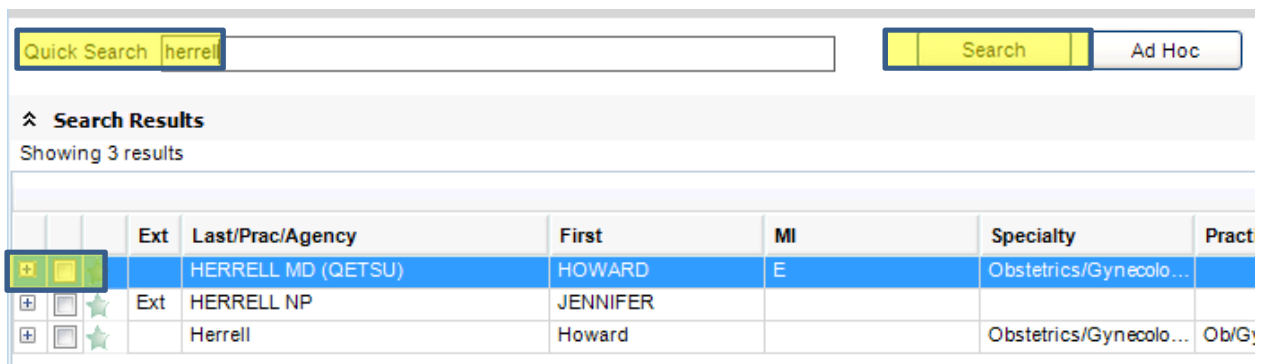
The fourth section is the **Patient Care Team**. This will be the area that all current providers and caregivers are documented. There is also a **free text box** that will be used to document additional information as to why the patient is seeing community resources.



The screenshot shows the 'Patient Care Team' section of a form. At the top, there are two buttons: 'Add Provider/Agency' (highlighted in yellow) and 'Add Patient Caregiver/Resource'. Below these buttons is a table with columns for 'Care Team Member', 'Role', and 'Relationship'. A single row is visible with the name 'CARTER...' and dropdown menus for 'Role' and 'Relationship'.

To add a provider, click **Add Provider/Agency** button.

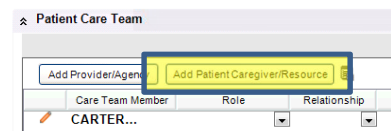
In the **Quick Search** box, type in the provider's last name and click **Search**. Click on the box beside the correct provider. Click **Ok**.



The screenshot shows the 'Quick Search' interface. A search box contains the text 'herrell'. To the right are 'Search' and 'Ad Hoc' buttons. Below the search box, it says 'Search Results' and 'Showing 3 results'. A table displays the search results:

	Ext	Last/Prac/Agency	First	MI	Specialty	Pract
<input checked="" type="checkbox"/>		HERRELL MD (QETSU)	HOWARD	E	Obstetrics/Gynecolo...	
<input type="checkbox"/>	Ext	HERRELL NP	JENNIFER			
<input type="checkbox"/>		Herrell	Howard		Obstetrics/Gynecolo...	Ob/G

To add a caregiver, click **Add Patient Caregiver/Resource** button.



The screenshot shows the 'Patient Care Team' section of a form. At the top, there are two buttons: 'Add Provider/Agency' and 'Add Patient Caregiver/Resource' (highlighted in yellow). Below these buttons is a table with columns for 'Care Team Member', 'Role', and 'Relationship'. A single row is visible with the name 'CARTER...' and dropdown menus for 'Role' and 'Relationship'.

A new line will show in the **Patient Care Team** box. Click on the **Pencil** to edit

Type in the pertinent information and click **Ok**.

7/30/2018

Patient Care Team: Member Details

Role: Relationship: Care Giver

Comment(s):

Last Name: Briggs Specialty:

First Name: Mitchell MI:

Agency Name:

Site:

Address 1:

Address 2:

City: State: Zip:

Phone: (423) 123-4567 Phone 2:

Fax: E mail:

InActive

Audit OK Cancel

To remove an entry on the Patient Care Team, click on the pencil beside the person you wish to

remove and click **InActive**.

Phone: (423) 123-4567

Fax:

InActive

The next 4 sections auto-populate based on what is currently in the chart: **Active Problems, Past Medical History, Current Meds, and Allergies.**

The **Care Plan/Results** section is where the **Quality Measures flowsheet** will populate if it was done recently. This is also where the new **Care Plan** will populate. In addition, you can pull pertinent lab results into this section.

To fill out the **Care Plan**, go to the **Flowsheet** tab on the right side and choose **Care Plan**.

The screenshot shows a medical software interface. On the left, there is a list of medications: Aspirin, Penicillins, NonMedication (Gluten, Latex, Strawberry). Below this is a 'Care Plan/Results' section with a table showing data for three dates: 16 Jul 2018, 13 Jul 2018, and 12 Jul 2018. The table has columns for 'Item Name', '16 Jul 2018', '13 Jul 2018', and '12 Jul 2018'. The items listed are 'Patient's Care Goals (chronic...', 'Self Management Tools', 'Barriers to Care', and 'Action Plan'. On the right, a dropdown menu is open, showing 'Care Plan' selected. Below the dropdown is another table with columns for 'Item Name', 'Select', '16 Jul 2018', '13 Jul 2018', and '12 Jul 2018'. The items listed are 'Patient's Care Goals (chronic...', 'Self Management Tools', 'Barriers to Care', and 'Action Plan'.

Select **New Column**, click in the white and select **Enter Result**.

The screenshot shows the same medical software interface as above. A 'New Column' dialog box is open, with 'New Column' selected. Below the dialog box, the 'Enter Result' button is highlighted. The table below the dialog box shows data for three dates: 27 Jul 2018, 16 Jul 2018, and 13 Jul 2018. The table has columns for 'Item Name', 'Select', '27 Jul 2018', '16 Jul 2018', and '13 Jul 2018'. The items listed are 'Patient's Care Goals (chronic...', 'Self Management Tools', 'Barriers to Care', and 'Action Plan'. The '27 Jul 2018' column is currently empty, and the 'Enter Result' button is highlighted.

Enter the information and click **OK**

7/30/2018

Results Details

Resulted: 30Jul2018 12:44PM Collected/Examined: 30Jul2018 12:44PM Verification R

CC Results :

Ordered By: Briggs, Monaco Route To: ALLSCRIPTS, Family Medicine

Performing Location: Performed By: Accession #:

Comments From Performing Location:

Vital Signs Input

Patient's Care Goals (chronic preventive):

Self Management Tools:

Barriers to Care:

Action Plan:

The **Care Plan** will show up in the note now.

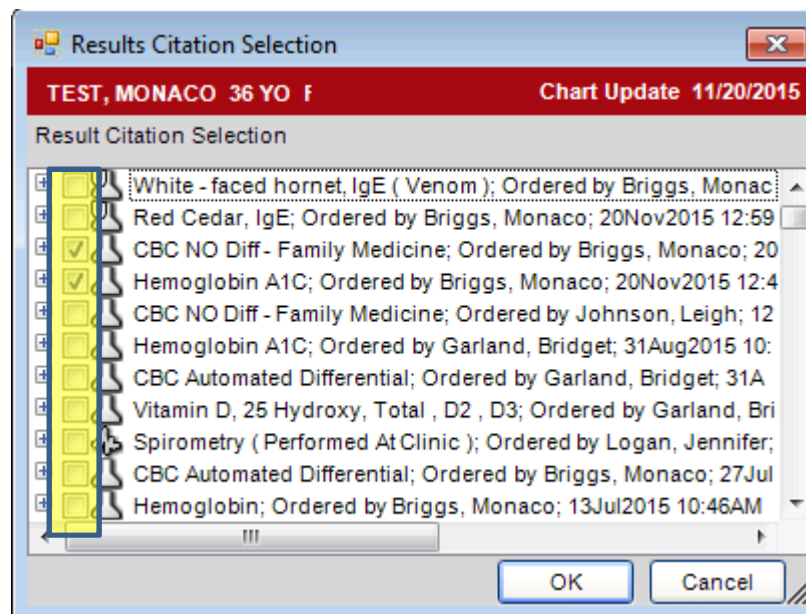
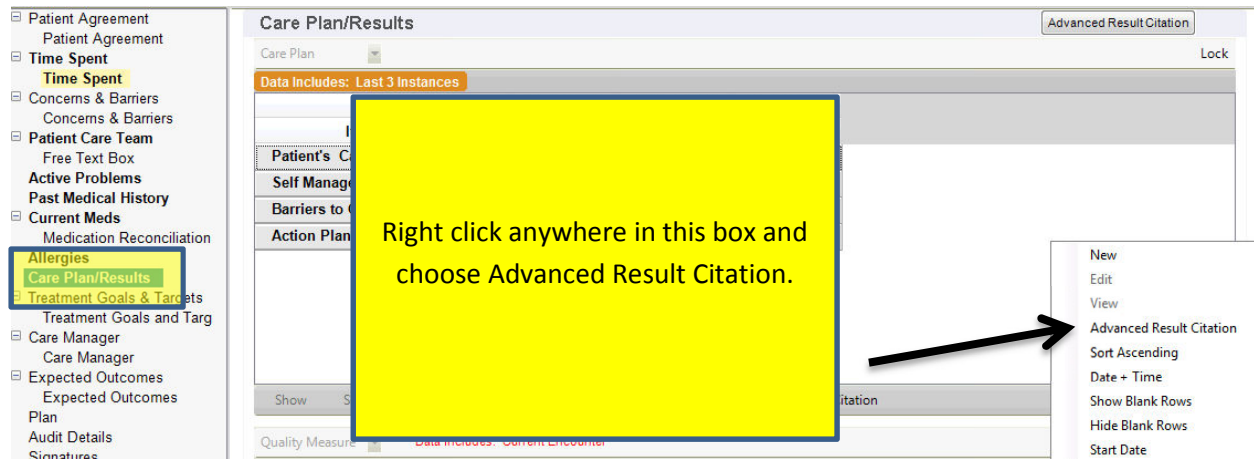
Care Plan/Results

Care Plan

Data Includes: Last 3 Instances

	30 Jul 2018	16 Jul 2018	13 Jul 2018
Item Name	1	1	1
Patient's Care Goals (chronic...	To improve...	1. Breath ea...	Lower A1C
Self Management Tools	Provided e...	Discussed u...	Diabetes cla...
Barriers to Care	Spouse doe...	No barriers i...	Husband is...
Action Plan	Will start sl...	1. Start Sym...	Divorce

To pull a result into this section, **Right Click** anywhere in the box and choose **Advanced Result Citation**.



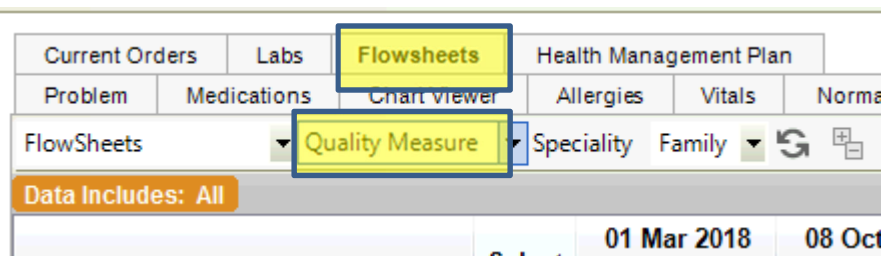
Check the boxes next to the labs you want to pull into the note. **Click Ok.**

The selected labs will now show up in the note.

Complete			
* CBC NO Diff - Family Medicine Briggs, Monaco Final 20Nov2015 12:52PM			
Test	Result	Flag	Reference
WBC	test		
RBC	test		
HGB	test		
Hemoglobin A1C Briggs, Monaco Final 20Nov2015 12:47PM			
Test	Result	Flag	Reference
Estimated Average Glucose	test		

If the patient has not had a **Quality Measures Form completed, you will need to complete it over the phone.

While in the note, go to the **Care Plan/Results** tab. Go to the **Flowsheet** tab on the right side and choose **Quality Measures** flowsheet.



Click **New Column**.

Current Orders Labs **Flowsheets** Health Management Plan
 Problem Medications Chart Viewer Allergies Vitals
 FlowSheets **Quality Measure** Speciality Family ↻

Data Includes: All

Item Name	Select	01 Mar 2018	
		1	
Have you ever had a...	<input type="checkbox"/>	NO	N
Have you had a flu shot this...	<input type="checkbox"/>	NO	N
Have you had colorectal...	<input type="checkbox"/>	NO	N
Colorectal Cancer Screening:...	<input type="checkbox"/>		n
Colonoscopy	<input type="checkbox"/>		
Have you had a mammogram...	<input type="checkbox"/>		N
Mammogram: who...	<input type="checkbox"/>		n
Mammogram	<input type="checkbox"/>		
Last Pap Smear	<input type="checkbox"/>		
Pap Smear: where / when?	<input type="checkbox"/>		n
DXA (bone) scan done in last...	<input type="checkbox"/>		N
Have you had a diabetic...	<input type="checkbox"/>		N
Diabetic (dilated) Eye Exam:...	<input type="checkbox"/>		n
Dilated Eye Exam	<input type="checkbox"/>		
Do you take aspirin on a...	<input type="checkbox"/>		N
Current Tobacco User?	<input type="checkbox"/>		N
Have you had two or more...	<input type="checkbox"/>		N
Have you had an injury as a...	<input type="checkbox"/>		N
Do you feel dizzy when you...	<input type="checkbox"/>		N
In the last two weeks, have...	<input type="checkbox"/>		
In the last two weeks, have...	<input type="checkbox"/>		
Have you been in the ER or...	<input type="checkbox"/>		
Are you currently on daytime...	<input type="checkbox"/>		

←

New Column Edit Column **Enter Result** Print Special

This will add a new column to the flowsheet for today's date. **Right click** in one of the **blank boxes** and choose **Enter Result**.

The screenshot displays a medical software interface with two main sections: 'Results Details' and 'Vital Signs Input'.
Results Details: This section includes tabs for 'Order', 'Results', and 'Goals'. It features a 'Record w/o Ordering' checkbox. Key fields include 'Resulted:' (30Jul2018 12:57PM), 'Collected/Examined:' (30Jul2018 12:57PM), and a 'Now' button. There is also a 'Verification Required' checkbox. Below these are fields for 'Ordered By:' (Briggs, Monaco), 'Route To:' (ALLSCRIPTS, Family Medicine), 'Performing Location:', 'Performed By:', and 'Accession #'. A 'Comments' box is also present.
Vital Signs Input: This section contains several rows of input fields with dropdown menus and icons:

- 'Have you ever had a pneumococcal vaccine? (age 65+):' with a blue dropdown menu.
- 'Have you had a flu shot this season? (Oct 1 - March 31):' with a dropdown menu.
- 'Have you had colorectal cancer screening?:' with a dropdown menu.
- 'Colorectal Cancer Screening: who performed / where / when?:' with a text input field.
- 'Colonoscopy:' with a text input field and a calendar icon.
- 'Have you had a mammogram within the past 24 months?:' with a dropdown menu.
- 'Mammogram: who performed / where / when?:' with a text input field.

The **Quality Measures Form** pulls up and can be filled out (See ACO Workflow). Once filled out, add the chart alert called, **QAF done- 2018**.

Treatment Goals and Targets form include free text boxes, similar to the Concerns & Barriers form.

The **Care Manager** form is also a free text form with one Y/N button.

Expected Outcomes form is free text with a couple of Y/N buttons.

The **Plan** will auto populate based on orders placed in the system.

The **Signatures** section is where the care manager filling out the note each month will sign. **This note will remain open for the month and you will add to it as you talk to the patient. You will sign and finalize the note each month and open a new note the next month.**

If you need to mail the patient their **Care Plan** or **Resources**, you will need to also complete the **FM- CCM PHM Letter**.

Click on the **New Note** tab at the top. The **Note Selector** will pop up. You will click on **Unstructured**. Visit Type: **FM CCM Letter** Owner: **You** and click **OK**

ical Desktop **New Note** Worklist Task List Batch Sign Appointments Patient Lists Provider Schedules

ST, MONACO PCP **Stone, Katherine** Other
MRN **001000651682701** Security **BREAK GLASS**
'9 (39y) F FYI FYI H.Phone

Note Selector

TEST, Monaco 03-Mar-1979 (39 years) F Chart Update: 27-Jul-2018

Create New

Style: Note **Unstructured** Admin Forms

Visit Type: **FM CCM Letter**

Owner: **Briggs, Monaco**

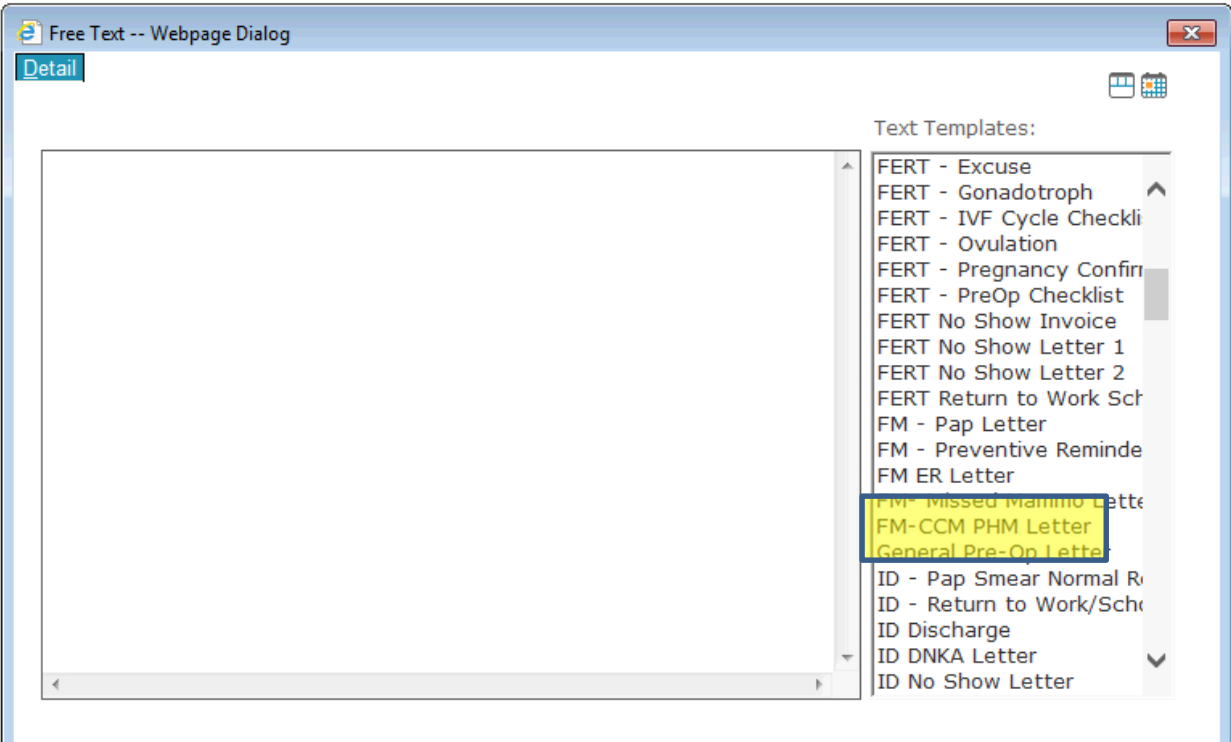
⚠ Incomplete Notes: << Choose an incomplete Note. >>

∨ Chief Complaint

At the bottom of the next screen, click on **TEXT**.

Spell New Note New Task... Req Corr Security... **Text...** Sign... Print... Cancel Save

When the Text Template box pops up, choose **FM-CCM PHM Letter**



There are a few text boxes that will need to be filled out in the box.

Double click in the box after **“you can reach me at”** and enter your phone number.

Double click in the box after **“we have appointment available on”** and enter the day of your extended hours.

After **“thank you”** you will enter your information and click **ok**.

education booklets.

I am in the office Monday- Friday, 8:00am-4:30pm and you can reach me at []. If you are in need of services after hours please call your Primary Care providers office and you will receive contact information for immediate assistance. We have appointments available on [TypeTextHere] until 6:30, for your convenience.

I look forward to working with you as together we strive to improve your health, achieve your goals, and prevent future hospitalizations.

Click **Sign**

Dear MONACO TEST,

I would like to thank you for the opportunity to be your Patient Health Manager in ETSU Family

I have enclosed your chronic care management care plan and some resources that may be helpful.

Chronic care management in itself is a way to involve you, me and the rest of your care team in your care on a regular basis with education material on your illness, lifestyle coaching, and referral

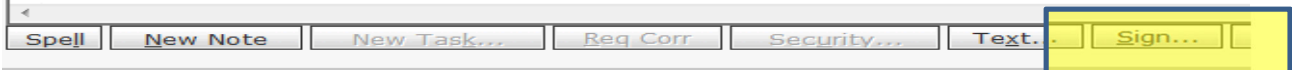
We are here to help you with your health needs. However, ultimately, you are in control of your health. Please lean on us to help you with your efforts and goals. We have a number of resources available to you.

I am in the office Monday- Friday, 8:00am-4:30pm and you can reach me at 423-439-1111. If you need any assistance. We have appointments available on Monday's until 6:30, for your convenience.

I look forward to working with you as together we strive to improve your health, achieve your goals.

Thank you,

Monaco
Patient Health Manager

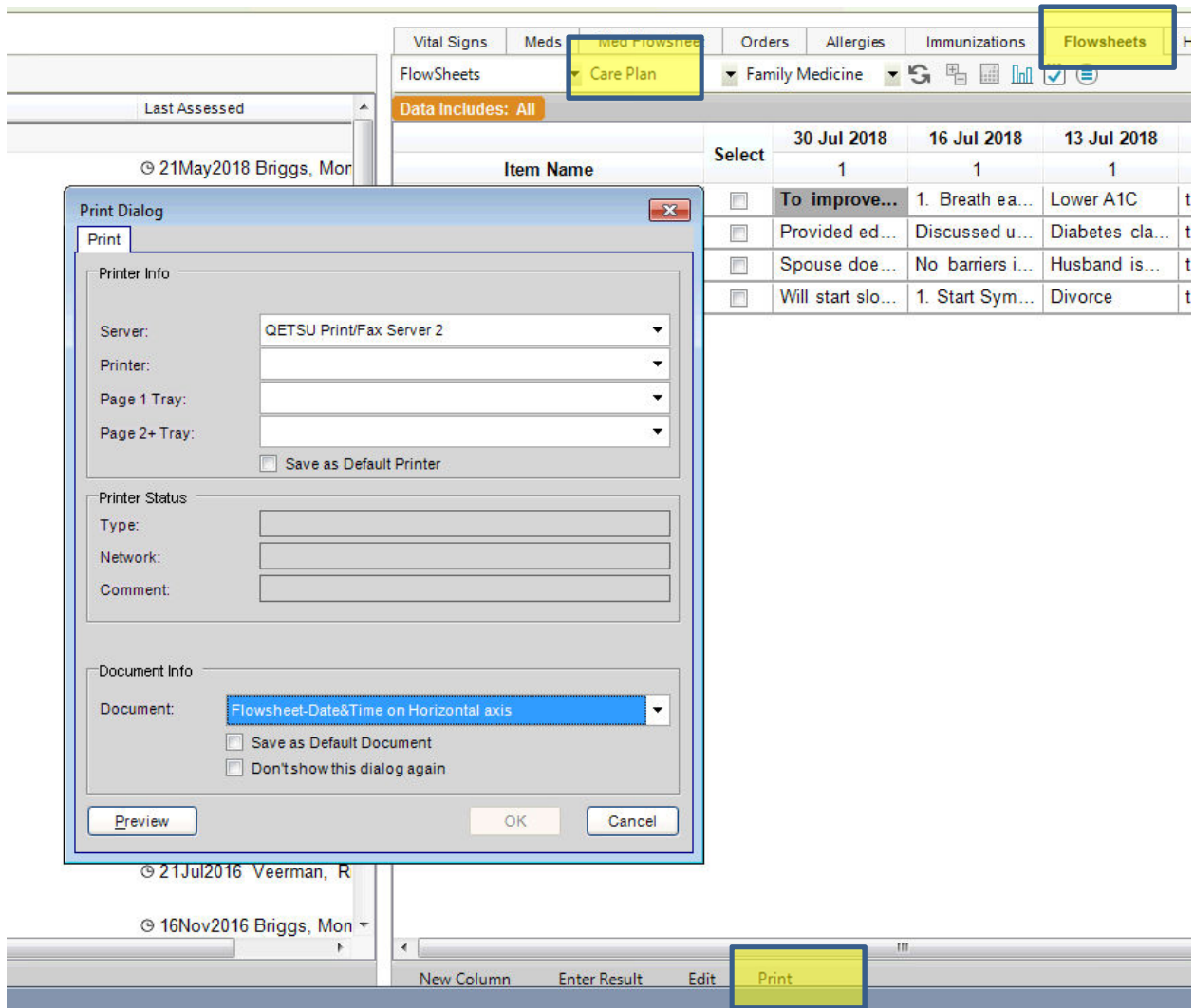


Once the letter is signed, you can click **Print** and mail the letter to the patient.

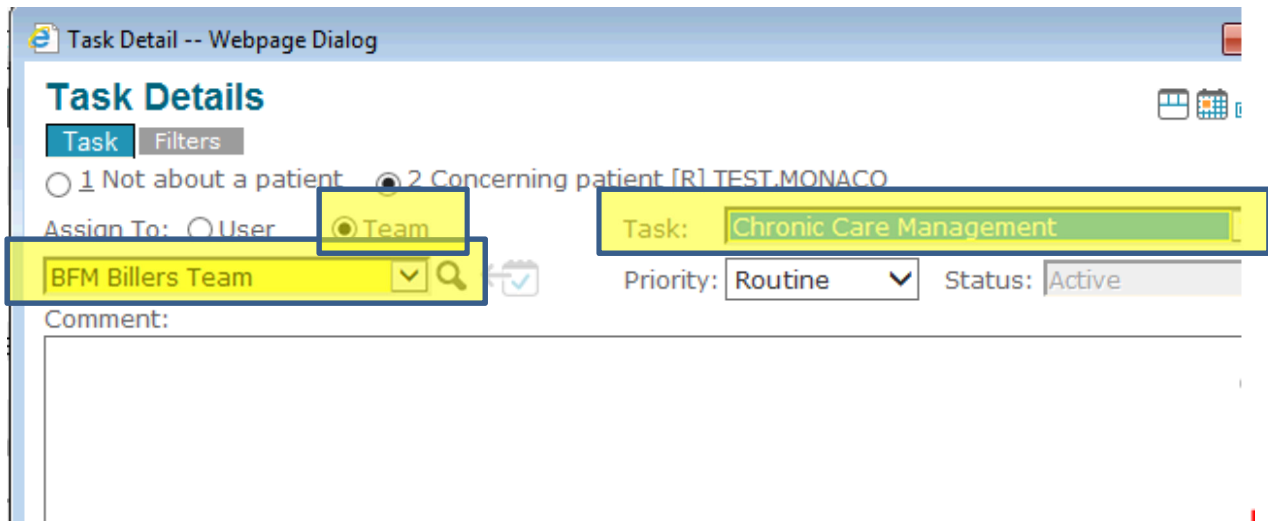


If you will be sending the care plan to the patient, you can go to the **Flowsheets** tab and select **Care Plan**. At the bottom, select **Print**.

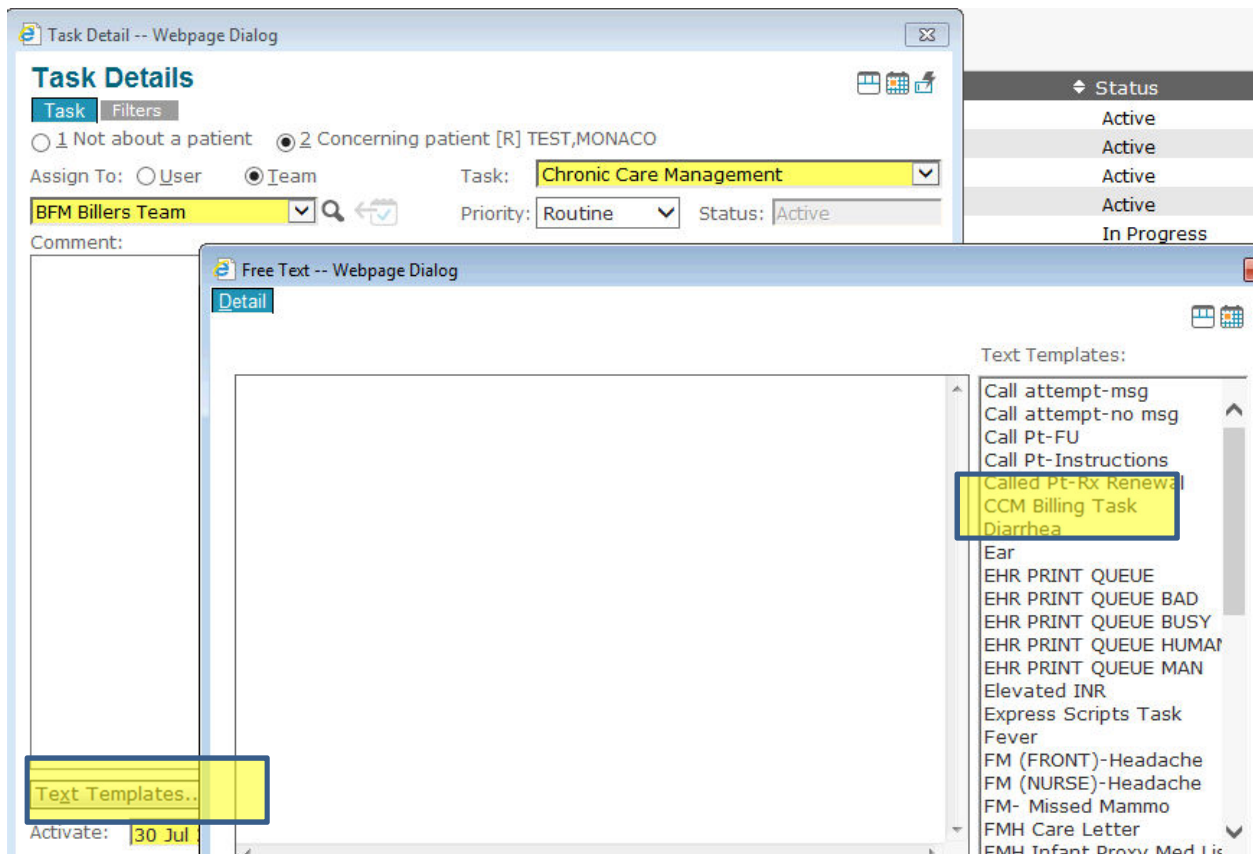
7/30/2018



At the end of each month and it's ready to be billed, be sure to **Sign** and **Finalize** the note. Then go to the **Task List** tab and choose **New**. In the **Task**: Choose **Chronic Care Management** Choose **Team** and select the correct **Billers Team**.



Then select **Text Templates** and choose **CCM Billing Task**.



Double click on the billing code that applies and type in the information in the **“type text here”**

Click **ok**.

CCM consent in chart.

[99490 (20 minutes non-face-to-face)
99487 (60 minutes non-face-to-face
[99489 (Each additional 30 minutes)

Date of Service: 7/30/18
Provider to Bill: Clarity
Diagnosis Codes: [TypeTextHere]

Bill date can be anytime in the calendar month after the date of service.

Thanks.

Text Templates:

- Call attempt-msg
- Call attempt-no msg
- Call Pt-FU
- Call Pt-Instructions
- Called Pt-Rx Renewal
- CCM Billing Task
- Diarrhea
- Ear
- EHR PRINT QUEUE
- EHR PRINT QUEUE BAD
- EHR PRINT QUEUE BUSY
- EHR PRINT QUEUE HUMAN
- EHR PRINT QUEUE MAN
- Elevated INR
- Express Scripts Task
- Fever
- FM (FRONT)-Headache
- FM (NURSE)-Headache
- FM- Missed Mammo
- FMH Care Letter
- FMH Infant Proxy Med Lis

Spell Check

Clear All Text

Text After Findings

OK

Cancel