** 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’sNP’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 |