



# Chronic Care Management Standard Operating Procedure

## Expectation:

Our goal for the monthly call will be to achieve a 7-minute-long call. This call will require the Monthly Review, 2 Condition Based Templates, 2 Barrier Templates and 1 Lifestyle Template to be a valid 7-minute (long) call.

For regular monthly calls you are expected to review: 1 Condition Based Template, 1 Barrier Template and 1 Lifestyle Template.

If these requirements are not met in the note and call, the long call will not be counted and a second call will need to be conducted during the month.

## Guideline for Flow of Call/Charting:

- ❖ Check patient information (make sure you click on the correct patient if dialing manually)
- ❖ Call Patient (if dialing manually)
- ❖ Introduction to Patient
  - You must state your name and be sure to include that you are a part of the CCM program through the providers office/doctor's name
    - ◆ If patient asks where you are calling from, to be more specific, mention the providers name
    - ◆ If patient states they see a specific provider in the practice, put it in the Sticky Notes
- ❖ Start Timer
  - If patient does not pickup, end call and click appropriate disposition
- ❖ Review Patient Chart
  - Sticky Notes
  - Previous Care Notes
    - ◆ Make sure to follow up on any information that requires it



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## ❖ HIPAA

- Verify name and DOB
- Receive Consent from Caretaker/Spouse
  - ◆ This must be done only once
  - ◆ Add the consent line to the sticky note to be copied in the custom notes section for each call going forward

## ❖ Monthly Review Section

- ER or Hospital Visit
  - ◆ If within past 10 days, go to TOC template
  - ◆ Complete TOC disposition
- Patient Requests
  - ◆ Check nurses' instructions for specifics on how to provide requests
- Monitoring Devices
  - ◆ BP/BG/SPO2/Weight (This is specific to the patient)
- Medications
  - ◆ Generalized questions
- Appointment
  - ◆ Verify with patient
  - ◆ Review visit history section (last encounter note)
  - ◆ Check future appointments – verify with patient
- Labs
  - ◆ Is the patient due for labs?



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- Review of Symptoms Marked Positive in Previous Visit
  - ◆ Report any new/worsening symptoms
- Disease Symptoms
  - ◆ Report any new/worsening symptoms
- Condition Based Template:
  - ◆ Review Problem List
  - ◆ Ask each question on template
- Condition Management
  - Examples:
    - ◆ Hypertension:
      - BP levels (Does patient check at home, ask/record actual level)
      - RPM vitals (if patient is in the program go over these with them)
    - ◆ Diabetes Mellitus:
      - BG levels (Does patient check at home, how many times, ask/record actual level)
      - RPM vitals (if patient is in the program go over these with them)
      - Feet (Dry, Clean, Last podiatry appointment, etc.)
- Constant Questions (Barrier Templates)
  - ◆ Medication Review
    - Every 3 months
  - ◆ Diet/Nutrition
    - Every 3 months
  - ◆ Fluid intake
    - Every 3 months



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- ◆ Exercise

- Every 3 months

- ◆ Pain

- ◆ Stress

- Lifestyle Based

- ◆ Topic of the month

- ◆ ADL's

- Preventative Management

- ◆ Vaccine status (Flu, Pneumonia, COVID, etc.)

- ◆ Review Condition management section

- ◆ Review Preventative measures section

- ❖ Disposition

- ◆ Use the proper disposition according to call type

## PLEASE KEEP IN MIND:

- ❖ Utilize narrative charting

- document if you gave encouragement, education, assistance, or your time/ear was given
- Remember, **IF IT IS NOT DOCUMENTED, IT NEVER HAPPENED!**
- be mindful of grammar and spelling

- ❖ DO NOT double chart

- If a template has a question twice, do not answer this question twice

- ❖ Get to know the patient

- Establish that rapport
- Smile while talking to them



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- Treat the patient as if they were your family
- ❖ Actively listen
  - Listen to what the patient is saying
    - ◆ If the patient expresses concern or has a worry that can be fixed per our services, assist them
    - ◆ Examples: medication refills, medication affordability, medication confusion, assistance at home, help with meals, etc.
- ❖ Escalate Issues!
  - If you told the patient that you would communicate with their provider about an issue, do it!
- ❖ Change the Condition Based and Barrier Templates up each month
  - This is to keep the conversation from being repetitive and help avoid a script like flow
  - DO NOT ASK THE SAME QUESTIONS WITH EVERY PATIENT!
- ❖ If you are unsure how to handle a situation, please speak to your Friendly Care Coordination Manager