



Care Management: What Does Embedment Look Like?

Does office staff know how to refer to the CM?

1. How does PCP, CM and office staff communicate?
 - a. Huddles
 - b. Electronically –EMR, instant message
 - c. Scheduled meetings
2. Does staff know criteria for identifying eligible patients who would potentially be a candidate for care management?
 - a. Appt for exacerbation or additional symptoms
 - b. Abnormal lab – gaps in care
 - c. Referral to specialist
 - i. Is CM included in feedback loop when pt sees a specialist / referral
 - d. Same day appts
3. Does staff know how to identify patients in the care manager's caseload? (active case load)
 - a. If yes, how:
 - b. Is CM alerted when pt has appt with PCP? ___ Y ___ N Describe
4. Does the staff know CM's schedule for the day? ___Y ___N Describe
5. Does CM receive specialists consult reports?
6. Does CM know when patient comes in for a same-day appt?
7. Who in the practice is involved in TOC?
8. Who is involved in meetings?
 - a. is CM involved in meetings with staff leadership?
9. Does CM meet with PCP on regular basis?
10. Does staff invite you to staff functions, practice celebrations?
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 are the roles of the team members in terms of delivery of care management and population health?
 - a. Describe:
14. Is CM doing administrative work? ___Y ___N
 - a. Describe:
15. Can CM list all of the things that take CM away from role and CM 5-step process?

16. Are eligible/potential care management pts identified in advance of scheduled visits?
17. Does CM have standardized educational materials?
18. What methods does CM use to communicate throughout the day with team members
19. How does CM handle urgent pt issues? Who and how are they identified?
20. Are CMs aware of after hour calls for your pts?
 - a. Does CM inform pts every visit about after hour and weekend 24/7 access to a clinical decision maker/PCP?
21. Does CM have extended hours and accessibility to meet the needs of the pt population?
22. Does practice have extended hours and accessibility to PCP level of care?
23. Does CM work after leaving the office?
 - a. Why and what?
24. Does it take CM longer to complete the documentation than it does to accomplish the work?
25. Comments/Other?