

For med team patients discharged to home with IMC hospital follow-up

Transitional Care Management (TCM) Resident Workflow

Part 1: Inpatient Workflow on Day of Hospital Discharge

Creating telephone encounter documenting the "Notification of Hospital Discharge" - route to Nate Conway



After Office Staff receives the "Notification of Hospital Discharge" note, they will call the patient within 2 days of discharge, discuss barriers to care, and office staff will sign this documentation.



Part 2: Outpatient Workflow on Day of Hospital Follow Up Office Visit

Navigating the TCM Note Template and Billing

Day of Hospital Discharge

TCM Resident Workflow

Only for patients who meet all of the following criteria:

1. Patient **was admitted** (including "Obs") (**Not ED discharges**)
2. Patient **discharged to home** (not SNF, LTAC, Hospice, etc)
3. Patient is going to **follow up with IMC** for hospital followup

The screenshot shows the Epic EMR interface for a patient named Mickey T. Mouse. The chart is titled "3/17/2021 visit with Joel Rayl, MD for Telephone". The interface includes a left sidebar with patient information, a central chart area with routing and notes, and a right sidebar with a note editor. Five red boxes with numbers 1 through 5 highlight specific workflow steps: 1. The Epic logo in the top left; 2. A note titled "Notification of Hospital Discharge" with a "Future Appointments" table; 3. The "Accept" button at the bottom right of the note editor; 4. The routing table showing "Nathaniel J. Conway, RN [NCONWAY]"; 5. The "Send and Close Workspace" button at the bottom of the routing area.

Date	Time	Provider	Dep
3/18/2021	9:00 AM	Joel Rayl, MD	Sun

The **IMC Hospital Followup Appointment** needs to be scheduled **PRIOR** to starting this process

Appointments should be **within 7 days** if at all possible

- Acceptable if made 8-14 days after discharge
- Appointments > 14 days after discharge do NOT qualify for TCM Visits.

Resident Workflow

1. Create NEW Telephone Encounter
2. Create a *Notification of Hospital Discharge* Note
.MEDTEAMTCMNOTE
3. Click "Accept"
4. Route to Nate Conway ("Nathaniel Conway")
5. Click Send and Close Workspace. (Do NOT Sign the Encounter)

IMC Hospital Follow Up Visit

TCM Resident Workflow

Only for patients with "TOC call completed" in visit notes
(All other visits, even if would otherwise qualify, should be completed like a normal office visit)

1 **.IMCTCMPROGRESSNOTE**

Subjective

Mickey T Mouse is a 45 y.o. male presenting today for a Transitional Care Management Visit related to his recent hospital stay.

HPI

2 Date of Hospital discharge: *** **A**
 Date of non face to face post-discharge phone call: 3/17/2021 **B**
 Call initiated 2 business days of discharge: Yes **C**
 Complexity of Medical Decision making for this visit: {as per medical decision making table: 19197::"moderate", "high"} **D**

3 **Detailed post-discharge medication reconciliation**
 Current medication and discharge medication lists were reviewed and reconciled during today's visit - see below
 Instructed patient to take all discharge medications as prescribed except where otherwise noted in assessment & plan.

Medications listed as ordered at the time of discharge from hospital:

Outpatient Medications Prior to Visit			
Medication	Sig	Dispense	Refill
• aspirin EC 81 MG EC tablet	Take 1 tablet by mouth daily	30 tablet	3
• metoprolol tartrate (LOPRESSOR) 25 MG tablet	Take 1 tablet by mouth 2 times daily	2 tablet	0
• budesonide-formoterol (SYMBICORT) 160-4.5 MCG/ACT AERO	Inhale 2 puffs into the lungs 2 times daily		

Reconciled medication list reflecting any changes from today's visit:

Current Outpatient Medications:

- aspirin EC 81 MG EC tablet, Take 1 tablet by mouth daily, Disp: 30 tablet, Rfl: 3
- metoprolol tartrate (LOPRESSOR) 25 MG tablet, Take 1 tablet by mouth 2

1. Use Dot Phrase to document TCM Visit:
.IMCTCMPROGRESSNOTE
2. 4 Mandatory Fields of Documentation:
 - A. Type in date of recent hospital discharge
 - B. Type in date of **1st documented attempt** of post-hospital phone call
(find date in recent telephone encounter)
 - C. Was the **1st attempt** of calling the patient made within 2 business days
(Yes or No as documented in telephone encounter)
 - D. Medical Decision Making Level:
 Most IMC visits are **High Decision Making** Complexity
(i.e. typical Level 4 visits)
3. Auto-filled mandatory documentation stating that the provider completed a **Medication Reconciliation** with discharge med list.
4. Select Appropriate Level of Service Code
 TCM visit ≤ 7 days of discharge: **99496**
 TCM visit ≤ 14 days of discharge: **99495**
 *** Consider Making Speed Buttons for Future Use***

4 **Level of Service**

99496 CPT(R)

Est 2 Est 3 Est 4 Est 5
 New 2 New 3 New 4 New 5

Do NOT Click

TCM <=7d TCM <=14d