Chronic Care Management

User Guide



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Document Revision History

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Documenting Encounters for Chronic Care Patients

This guide provides instructions for using the **Chronic Care Management (CCM)** practice templates.

Open the CCM System Templates

- 1 Log on to NextGen Ambulatory EHR.
- 2 From the File menu, click System\Practice Template. The Select Template window opens.
- 3 In the Show section, click All



4 Double-click CCM System Setup. The CCM System Setup template opens.

CCM System Setup Template

The **CCM System Setup** template is the central location for configuring the CCM templates.

The system template includes the following components:

- > CCM System Setup
- **CCM** Practice Setup (see "CCM Practice Setup Template" on page 9)
- **CCM Billing** (see "CCM Billing Template" on page 32)
- > CCM Population Dashboard (on page 70)
- > CCM Opportunity Dashboard

The **Chronic Care Management System Setup** section allows you to set defaults that impact the CCM Billing and CCM Opportunities Dashboard templates.

4	06/05/2017 05:28 AM : ***CCM Manage	ement" CCM System Setup x
*0	CM Sidebar 🛛 🖣	
	Chronic Care Management	Chronic Care Management System Setup
	CCM Billing	Share CCM chronic conditions, CCM payers, and CCM services between practices (All practices use practice 0001 setup)?
	CCM Population Dashboard	© Yes C No
	CCM Opportunity Dashboard	Allow centralized billing of CCM charges?
	CCM Practice Setup	Yes, CCM charges can be billed for all practices from any practice.
		O No, current practice can only bill for the current practice.
		Hide Update Button on Opportunity Practice Template 🗌

Based on the organization's preferences, you can set up the options for billing and population opportunities as follows.

Option	Click	Result
Share CCM chronic conditions, CCM payers, and CCM services between practices.	Yes	Allows all the practices in an enterprise to view all the CCM chronic conditions, CCM payers, and CCM services.
	No	Restricts to the data associated with each individual practice.
Allow centralized billing of CCM charges.	Yes	Allows CCM charges to be billed for all the practices from any practice.
	No	Allows only the current practice to bill the current practice.
Hide Update Buttons on Opportunity Practice Template check box	Use is not recommended	

CCM Practice Setup Template

Use the **CCM Practice Setup** template define the following information for all practices:

- > Eligible chronic conditions
- > CCM participating payers
- > Chronic care management services

The CCM Practice Setup template also allows you to configure the **Enrollment Document** and manage the CCM Symptoms list.

Note: The Chronic Care Management Practice Setup template controls settings for all practices.

Problems *CCM Practice Setup ×				\$		
*CCM Sidebar # Chronic Care Management CCM Billing	Chronic Care Mana Use this template to set el Note: This template cont	Chronic Care Management Practice Setup Image: Set Specialty for CCM Image: Set Specialty for CCM Use this template to set eligible chronic conditions and define types of chronic care management services. Default Specialty for CCM Note: This template controls settings for all practices. Image: Set Specialty for CCM				
CCM Population Dashboard	Opportunity Dashboa	rd Setup				
CCM Opportunity Dashboard	CCM Opportunity Dashboard Chronic Conditions CCM Practice Setup To make a chronic condition eligible for CCM opportunity flagging, select the code type and then click the search button. To remove a chronic condition from eligibility, highlight it in the grid and click the remove button. Note: Problems and diagnosis must be flagged as chronic in the patient's chart in order for them to be eligible for CCM.					
		,				
	Туре	Code	Description			
	Problem (SNOMED)	10321002	Abscess of mastoid			
	Diagnosis (ICD)	H70.009	Acute mastoiditis without complications, unspecified ear			
	Diagnosis (ICD)	H65.00	Acute serous otitis media, unspecified ear			
	Diagnosis (ICD)	H74.19	Adhesive middle ear disease, unspecified ear			
	Diagnosis (ICD)	401.1	Benign essential hypertension			
	Problem (SNOMED)	399326009	Bladder Ca			
	Diagnosis (ICD)	H35.719	Central serous chorioretinopathy, unspecified eye	•		
	√	1				

The CCM Practice Setup information is organized in the following panels:

- > Chronic Care Management Default Specialty
- > Opportunity Dashboard Setup
- > CCM Participating Payers
- > Chronic Care Management Services
- > Consent Document
- > Symptoms List
- Care Plan Review
- > CCM Common Phrases Configuration

- > CCM Administrative Reports
- > CCM Service Item

Chronic Care Management Default Specialty

Defining a CCM default specialty allows you to set a specialty to be applied to the CCM templates exclusively. No other NextGen KBM templates are affected by defining this setting.

Note: This feature needs to be set only when the CCM templates operate under a different specialty than the other templates. This setting applies to CCM templates only. The Ngkbm_Config practice template setting must be used for normal defaults.

Define the CCM Default Specialty

1 Click the **Set Specialty for Chronic Care** check box.

nt Practice Setup	Set Specialty for CCM
thronic conditions and define types of chronic care management services.	Default Specialty for CCM: Clear

2 Click the **Default Specialty for CCM** field.

The options list opens.

N	gkbm Get Dbpicklis	Items	x
	List Item Allergy & Immunology Ambulatory Surgery Behavioral Health Cardiology Care Management Dental Dermatology Family Practice Gastroenterology General Surgery Gynecology Internal Medicine Nephrology Neurosurgery Obstetrics Oncology		
	Ophthalmology Orthopedics Refresh	<u> </u>	▼ Cancel

3 Select Internal Medicine.

The Default Specialty for CCM populates the field.

nt Practice Setup	Set Specialty for CCM
branic conditions and define tunos of shranic sate management convises	Default Specialty for CCM: Internal Medicine Clear

4 To delete the Default Specialty for CCM, click **Clear**.

Opportunity Dashboard Setup

Use the **Opportunity Dashboard Setup** panel to define the chronic conditions eligible for CCM opportunities. The chronic conditions are listed in the grid. You can search the conditions, and you can add or remove conditions from the list.

Note: A patient's problem and diagnosis must be marked as chronic in order for them to be eligible for CCM services.

Chronic Conditions					
ſo make a chronic conditi	on eligible for CCM	opportunity flagging, select the code type a	nd then click the search butto	n.	
o remove a chronic cond	ition from eligiblity,	highlight it in the grid and click the remove	button.		
Note: Problems and diag	posis must be flagge	d as shronis in the nationt's short in order f	or them to be eligible for CCN		
vote. Problems and diag			or them to be engible for CCM		
Code type		Search Order	oy: • Combined O Type	C Code C Description	Remove
Turne	Carda	Description			
Type Droblem (ENOMED)	10221002	Abscess of masteid			
Problem (SNOMED)	10321002	Abscess of mastold			
Diagnosis (ICD)	H70.009	complications unspecified ear			
Diagnosis (ICD)	H65.00	Acute serous otitis media, unspecified ear			
Diagnosis (ICD)	H74.19	Adhesive middle ear disease, unspecified ear			
Diagnosis (ICD)	401.1	Benign essential hypertension			
Problem (SNOMED)	399326009	Bladder Ca			
Diagnosis (ICD)	H35.719	Central serous chorioretinopathy, unspecified eye			
Diagnosis (ICD)	E23.2	Diabetes insipidus			
	72011000	Diabatas mollitus			
CCM Deutisiustium De	Worr				

The **Code Type** field enables the user to define which chronic condition types the stored procedure should search the database. You search by either Diagnosis (ICD) or Problem (SNOMED) code type.

The grid can be displayed in the following 4 views:

- > Combined (Default view)
- > Type
- > Code
- > Description

Note: The Problem and Diagnosis grids are meant only to define the search parameters for the patients that might be eligible for CCM enrollment. It does not prevent a patient from enrolling with chronic conditions that are not listed in the grid.

View by Type

To display the grids that show the Code type (SNOMED or ICD) separately, select **Type**.

Problem (SNOMED) Diagnosis (ICD)					
Description	Code	Description	Code		
Abscess of mastoid	10321002	Acute mastoiditis without complications, unspecified ear	H70.009		
Bladder Ca	399326009	Acute serous otitis media, unspecified ear	H65.00		
Diabetes mellitus	73211009	Adhesive middle ear disease, unspecified ear	H74.19		
Diabetes mellitus	73211009	Benign essential hypertension	401.1		
Headache	25064002	Central serous chorioretinopathy, unspecified eye H35.719			
Hyper-beta-alaninemia	2359002	Diabetes insipidus	E23.2		
Lumbago with sciatica	202794004	Epilepsy, unspecified, intractable, with status epilepticus	G40.911		
Portopulmonary hypertension	445237003	Epilepsy, unspecified, intractable, with status epilepticus	G40.911		
Progressive pulmonary hypertension	10964002	Essential (primary) hypertension	110		
		Lung hypertension	127.2		
		Nonexudative age-related macular degeneration	H35.31		
	Þ		566.0		

View by Code

To display the grid by code (SNOMED and ICD combined), select **Code**.

	Code type	Search	Order by
Code	Description	Туре	
10321002	Abscess of mastoid	Problem (SNOMED)	
10964002	Progressive pulmonary hypertension	Problem (SNOMED)	
202794004	Lumbago with sciatica	Problem (SNOMED)	
2359002	Hyper-beta-alaninemia	Problem (SNOMED)	
25064002	Headache	Problem (SNOMED)	
399326009	Bladder Ca	Problem (SNOMED)	
401.1	Benign essential hypertension	Diagnosis (ICD)	
445237003	Portopulmonary hypertension	Problem (SNOMED)	
73211009	Diabetes mellitus	Problem (SNOMED)	
73211009	Diabetes mellitus	Problem (SNOMED)	
E10.65	Type 1 diabetes mellitus with hyperglycemia	Diagnosis (ICD)	-
•			►

View by Description

To sort and display the grid in description order (SNOMED and ICD combined), select **Description**.

Code type		Search	Order by: C Con	mbined C Type	C Code C Code C Code	Remove	
Description	Code	Type					
Abscess of mastoid	10321002	Problem (SNOMED)					
Acute mastoiditis without complications, unspecified ear	H70.009	Diagnosis (ICD)					
Acute serous otitis media, unspecified ear	H65.00	Diagnosis (ICD)					
Adhesive middle ear disease, unspecified ear	H74.19	Diagnosis (ICD)					
Benign essential hypertension	401.1	Diagnosis (ICD)					
Bladder Ca	399326009	Problem (SNOMED)					
Central serous chorioretinopathy, unspecified eye	H35.719	Diagnosis (ICD)					
Diabetes insipidus	E23.2	Diagnosis (ICD)	_ _				
Disheter mellitur	72011000	Broblem (SNOMED)					
scription	Code	Туре					
celerated hypertension	401.0	Diagno	sis (ICD)				
TB	4943600	Diagno					
viety depression		4 Problem	(SNOMED)				
	F41.8	4 Problem Diagno	(SNOMED)				
terial hypertension	F41.8	4 Problen Diagno Diagno	sis (ICD)				
terial hypertension	F41.8 110 493.90	4 Problen Diagno Diagno Diagno	sis (ICD) sis (ICD) sis (ICD) sis (ICD)				
terial hypertension thma thma	F41.8 110 493.90 1959670	4 Problen Diagno Diagno Diagno 01 Problen	n (SNOMED) sis (ICD) sis (ICD) sis (ICD) (SNOMED)				
the pression thma thma thma with COPD	F41.8 I10 493.90 1959670 493.22	4 Problem Diagno Diagno Diagno 01 Problem Diagno	a (SNOMED) sis (ICD) sis (ICD) sis (ICD) (SNOMED) sis (ICD)				
terial hypertension thma thma thma with COPD thma with COPD	F41.8 I10 493.90 1959670 493.22 493.22	4 Problem Diagno Diagno Diagno 01 Problem Diagno Diagno	(SNOMED) sis (ICD) sis (ICD) sis (ICD) (SNOMED) sis (ICD) sis (ICD)				
the string of th	F41.8 110 493.90 1959670 493.22 493.22 of 496	4 Problem Diagno Diagno 01 Problem Diagno Diagno Diagno	(SNOMED) sis (ICD) sis (ICD) sis (ICD) (SNOMED) sis (ICD) sis (ICD) sis (ICD)				
terial hypertension thma thma thma with COPD thma with COPD aronic (long term) obstruction e airway passages (COPD) aronic fatigue syndrome	F41.8 110 493.90 1959670 493.22 493.22 of 496 R53.82	4 Problem Diagno Diagno Diagno 01 Problem Diagno Diagno Diagno Diagno	(SNOMED) sis (ICD) sis (ICD) sis (ICD) (SNOMED) sis (ICD) sis (ICD) sis (ICD) sis (ICD) sis (ICD)				

Add Conditions Eligible to be Treated as Chronic by Practice

1 Click the **Code Type** field.

The **CCM Code Type** list appears.

ms and diagnosis must be	e flagged as chr	Ccm Code Type	×
Code type		Problem (SNOMED) Diagnosis (ICD)	
	Code		
mastoid	10321002		
oiditis without ns, unspecified ear	H70.009		
s otitis media, ear	H65.00		
iddle ear disease, ear	H74.19		Close

2 Select one of the following two Code Types:

For Problem (SNOMED)

a) Select **Problem (SNOMED)**.

The SNOMED Search template opens.

(Q)		Search X
Description	Fully Specified Name	Concept Id

b) Enter the description or code. In this example, type **hypertension** and click **Search**. The search results appear.

Opportunity D	ashboard Setup			۲
Chronic Conditio				~
To make a chroni	Q hypertension		Search	
To remove a chro				-
Note: Problems a	Description	Fully Specified Name	Concept Id	
6	Hypertension	Hypertensive disorder	38341003	
	Pulmonary arterial hypertension associated with portal hypertension	Pulmonary arterial hypertension associated wi	445237003	-
	Portopulmonary hypertension	Pulmonary arterial hypertension associated wi	445237003	
Description	Hypertension associated with transplantation	Hypertension associated with transplantation	427889009	
Acute mastoidit	Hypertension caused by drug	Hypertension secondary to drug	194791005	
complications, u	Hypertension caused by oral contraceptive pill	Hypertension induced by oral contraceptive pill	169465000	
unspecified ear	Hypertension complicating pregnancy	Pregnancy-induced hypertension	48194001	
Adhesive middle	Hypertension complicating pregnancy, childbirth and the puerperium	Hypertension complicating pregnancy, childbi	198941007	
Benign essentia	Hypertension due to renal vascular disease	Renovascular hypertension	123799005	
Bladder Ca	Hypertension due to renovascular disease	Renovascular hypertension	123799005	
unspecified eye	Hypertension in the obstetric context	Hypertension in the obstetric context	367390009	
Diabetes insipic	Hypertension in the puerperium with pulmonary edema	Hypertension in the puerperium with pulmon	698640000	
1	Hypertension in the puerperium with pulmonary oedema	Hypertension in the puerperium with pulmon	698640000 -	•
CCM Participa	Re	sults are limited to top 100. Consider refining search.		
To make nationts		Select	Cancel	
To make patients				<i>h</i>
1				

c) Highlight the code and click **Select**.

The selected **Problem (SNOMED)** is added to the eligible chronic conditions list.

For Diagnosis (ICD)

a) Select **Diagnosis (ICD)**

The Diagnosis Search template appears.

Q Enter search term				Search
All Diagnoses Patient's Diagnoses Patient's Chronic Diagnoses Favorites Diabetes Codes All Fee Ticket Categories CHF Chest Pain Comadin ICD Legacy Mapping	ICD Code	Clinical Description and ICD Code	Billing Description	
٥			Select	Cancel

b) Enter the description or code, and click **Search**.

The search results display.

All Diagnoses	ICD Code	Clinical Description and ICD Code	Billing Description
Patient's Diagnoses	110	Essential (primary) hypertension 110	Essential (primary) hypertension
Patient's Chronic Diagnoses	110	Arterial HTN 110	Essential (primary) hypertension
Favorites 📩	110	Arterial hypertension 110	Essential (primary) hypertension
📋 Diabetes Codes	110	Benign HTN I10	Essential (primary) hypertension
All	110	Benign hypertension I10	Essential (primary) hypertension
	110	Essential HTN I10	Essential (primary) hypertension
CHF	110	Essential hypertension I10	Essential (primary) hypertension
Schest Pain	110	High blood pressure 110	Essential (primary) hypertension
式 Coumadin	110	High BP 110	Essential (primary) hypertension
CD Legacy Mapping	110	HTN 110	Essential (primary) hypertension
	110	Hypertension I10	Essential (primary) hypertension
	110	Malignant HTN I10	Essential (primary) hypertension
	110	Malignant hypertension 110	Essential (primary) hypertension
	110	Primary HTN 110	Essential (primary) hypertension
	110	Primary hypertension 110	Essential (primary) hypertension
	110	Systemic HTN 110	Essential (primary) hypertension

c) Highlight the diagnosis and click Select.
 The selected diagnosis (ICD) code is added to the eligible chronic conditions list.

Remove a Chronic Condition from the List of Eligible Conditions

- 1 In the **Opportunity Dashboard Setup** panel, highlight the row to be removed.
- 2 Click **Remove**.

CCM Participating Payers

The **CCM Participating Payers** grid allows the practice to define which payers are participating in the CCM program.

ractice Payer List	[CCM Participating Payers	
Payer Name	Address	_	Payer Name	Address
Advanced SIM Library Payer	PO Box 14612 Lexington, KY 405124601		AARP	United Healthcare Claim Division Po Box 740819 Atlanta, GA
Aetna PPO	PO Box 97041 Lexington, KY 405124079			303740819
Behavioral Health Medicaid	PO Box 10293 Lexington, KY 40512		Aetna HMO	Po Box 14079 Lexington, KY 405124079
Benavioral Health Payer	PO Box 10293 Lexington, KY 40512		Aetna UB	123 Main Street Baltimore, MD 21212
Contract Payer	11/45 N Contract Court Chattanooga, TN 374225741		Anthem BCBS CA	Po Box 60007 Los Angeles, CA 900600007
D Aetha	PO BOX 981106 EI Paso, IX /9998		BCBS Federal	Po Box 37790 Louisville, KY 402337790
D Cigna	Po Box 188046 Chattanooga, TN 37422		BCBS PA	Po Box 69454 Harrisburg, PA 171069352
D Delta Dental	Po Box 997330 Sacramento, CA 95853		Cigna Healthcare POS	Po Box 188050 Chattanooga, TN 374228050
Eyemed	Po Box 8504 Mason, OH 45040		First Health	Po Box 11127 Tucson, AZ 85734
ICD10 Payer (General Tab	Po Box 14685 Lexington, KY 405124601		Humana	Po Box 14601 Lexington, KY 405124601
Mappings)	Pa Paul 4600 Lavia stars 10/ 4051 24601		Medicaid	Po Box 8042 Harrisburg, PA 17105
ICD10 Payer (No Mappings)	P0 B0x 14660 Lexington, KT 405124601		Medicare	Po Box 1051 Augusta, GA 309031051
Mannings)	P0 B0X 14067 Lexington, KT 405124001		Tricare	Po Box 870410 Surfside Beach, SC 29587
MediCal	Po Box 997413 Sacramento, CA 95814		United Health Care PPO	Po Box 740800 Atlanta, GA 303740819
MediCal Old Enc Rate Functionality	Po Box 997413 Sacramento, CA 95814			
Medicare Railroad	Po Box 10066 Augusta, GA 309990001			
Medicare UGS	6775 West Washington St Milwaukee, WI 53214			
Mutual Of Omaha	Po Box 3608 Omaha, NE 681755300			
Pregnancy Indicator Payer	Po Box 188867 Chattanooga, TN 374228050			
Property And Casualty Payer	Po Box 188051 Chattanooga, TN 374228050			
Tax Rate Payer	Po Box 3745 Omaha, NE 681755300			
VSP	Po Box 997100 Sacramento, CA 95899			
WC Iron Workers	PO Box 83746 Lexington, KY 405124079			
M/C Dippacol Accurance	DO Roy 07041 Levington KV 4051 24070	_		
•		•		

Add Payers to CCM Participating Payers List

Adding a payer to the **CCM Participating Payers** list makes patients using that payer eligible for CCM opportunity flagging.

- 1 Select the payer from the **Practice Payer** list.
- 2 Click the **right arrow**.

The practice is added to the CCM Participating Payers list.

Remove Payers from the CCM Participating Payers List

- 1 Select the payer from **CCM Participating Payers** list.
- 2 Click the left arrow.

The practice is removed from the **CCM Participating Payers** list.

Define the Time Span that Flags a Patient for CCM

The **Maximum Time Since Last Visit** field defines the number of months prior to a patient's last visit are eligible for CCM opportunity flagging.

1 Click the **Maximum Time Since Last Visit** field immediately below the grid.

The Number Pad opens.



- 2 Using the **Number Pad**, enter the number of months.
- 3 Click OK.

The number you entered populates the Maximum Time Since Last Visit field.

CCM Types, Agencies and Team

Use the **CCM Types, Agencies and Team** grid to define the types of chronic care management services provided.

CCM Service Types, Agencies and Team								
To add chronic care management services, type a brief descrip	tion in the field be	low and click add.		Share Age	ncy Across Location	ns		
To remove services, highlight them in the grid and click remov	e.	CCM Agency						
		Agency Name			Agency Type			
	Add	Agency Phone#) -		Agency Fax#) -		
Service Description								
Service Description	Remove	Location						
Coordinate referrals		Agency Name	Agency Type	Phone	Fax		Location	(Add)
Coordinate Transportation		Test Agency 1	Type 1		11. · · · · · · · · · · · · · · · · · ·	-	Office Abington	
Coordinate with Home Health		Test Agency 2	Type 2		11. BREERE	881	Office Abington	Del
Diagnosis checkup		Test Agency 3	Type 3		12 0000000	100	Silver Ridge Assisted Livin	9
Manage specialist visits								
Manage transition care								Update
Medication checkup	_	66M T		Share Inte	rdisciplinary Teams	Across Lo	cations	
		CCM Team						
		Name		R	ole			
		Phone #: () -		Locati	on:			
					,			
]	Name	Role	2	Pho	ne	Location	Add
		Team 1	Hom	ne Health	1000		Office Abington	
		Team 2	Care	e Team	1848	1111111	Office Abington	Del
								Update

Add a Chronic Care Management Service Type

1 In the **Service Description Add** field, enter a brief description of the service type. For this example, type **Manage services**.

	CCM Service Types, Agencies and Team	
	To add chronic care management services, type a brief descript	ion in the field bel
	To remove services, highlight them in the grid and click remove	s
ſ	Manage services	Add
1	Service Description	
	Service Description	Remove
	Coordinate referrals	
	Coordinate Transportation	
	Coordinate with Home Health	
	Diagnosis checkup	
	Manage specialist visits	
	Manage transition care	
	Medication checkup	

2 Click Add.

The entry is added to the **Service Description** panel.

Maximum Time Since Last Visit 36 months setup	
CCM Service Types, Agencies and Team	
To add chronic care management services, type a brief descript	ion in the field be
To remove services, highlight them in the grid and click remove	
<u> </u>	Add
Service Description	
Service Description	Remove
Coordinate referrals	
Coordinate Transportation	
Coordinate with Home Health	
Diagnosis checkup	
Manage services	
Manage specialist visits	
Manage transition care	
Medication checkup	

Remove a Chronic Care Management Service Type

- 1 In the **Service Description** panel, highlight the service type you want to remove.
- 2 Click **Remove**.

Add a CCM Agency

Use the **CCM Agency** panel to define the agency used by the practice for their CCM patients.

CM Agency		Share Agency Ac	loss cocations		
gency Name		Ag	ency Type		
		4.0			
gency Phone# []		Ag	ency rax# (()		
ocation			ency rax#j() -		
ocation	Agency Type	Phone	Fax	Location	Add
ocation Agency Name Test Agency 1	Agency Type Type 1	Phone	Fax	Location Office Abington	Add
Agency Prone# Agency Name Test Agency 1 Test Agency 2	Agency Type Type 1 Type 2	Phone	Fax	Location Office Abington Office Abington	Add

- **1** Enter the CCM agency's:
 - > Name
 - > Type
 - > Phone number
 - > Fax number
 - > Location
- 2 Click Add.

The CCM agency information populates the grid.

3 Click the Share Agency Across Locations check box to show all CCM agencies for all locations on the Care Plan template.

Add a CCM Team

Use the **CCM Team** panel to define the team used by the practice for all their CCM patients.

CCM Team	Share Interdisciplina	ry Teams Across Lo	cations	
Name	Role			
Phone #: () -	Location:			
Name	Role	Phone	Location	Ade
Name Team 1	Role Home Health	Phone	Location Office Abington	Add

- **1** Enter the CCM team's:
 - > Name
 - > Type
 - > Phone number
 - > Location
- 2 Click Add.

The CCM team information populates the grid.

3 Click the **Share Interdisciplinary Teams Across Locations** check box to show all CCM teams for all locations on the **Care Plan** template.

Create and Attach a Consent Document to the CCM template

1 Create a consent document using the instructions available at your practice, and then save the document in your local folder.

Note: Ensure that the guidelines set by the respective practice are followed, as the consent document is a contract between the patient and the practice.

- 2 Open a blank CCM document in the NextGen application using **DocumentBuilder** from the **NextGen** folder.
- **3** When the document opens, paste the required content in the document.
- 4 Click **Tools**.
- **5** Click **Compile** to save the document.

The content is displayed in the document in runtime.

The A Constant & OLICI - Heating a		
the view time links		 [A] University
entre . M Caren . Share with . 1	lum Neve tolder	21 - 7
Downloads	* Name	Data muldfaid Tune Data maint
Dropitor	CE MPROVADOR	TO A REPORT AND A
Recent Places	Assembly/Scanner.exe	4)17/2015.601.PM Application 7.KB 4/27/2015.749.AM
	M AuditReportTool.exe	4/25/2014-4-48 AM Application 237 KE 1/00/2014-12:00 PM
heaktoon	BarcodeTest.eve	7/28/2005 712 AM Application 294 KE 7/28/2005 712 AM
Libraries	BatchApptExport.exe	4/25/2014 5:01 AM Application 261 KII 7/30/2014 12:00 FM
Gill Ray	Datchdoc.exe	4/2/2 with Interface Document Builder
AnnData	DBPEngineService.exe	
Application Date	ER BEFManager.eve	4/9/10 File Edit View Tools Help
Red Che	2 08PServiceControllar.exe	
a every see	A CmpConvertex ave	112 Marce Seeth
Contacts	and could are	
Cooper	- DocumentBuilder ave	4263
Develop	and Decomments concerned area	Macro Type Open Document
Light miteads	Personant counterfacto and	A Marea
D Dropbox	2 Compartitudes as	Resultant. See a resource to open.
P Favorites	and deather and the state of the sec	
Links	and the second second second	
Local Settings	Com Cochool See	Size Kam
Lync Recordings	CD_CP14_OpeneoUsity.ese	Search Date Conectional Health Med
My Documents	BK stopping to a	Deta AU AU AU AU
My Documents	InstallCDO.exe	CARD_sub: CARD_s
Ady Music	InstatiPO/Drivers.exe	2:19/3 Decase Management
My Pictures	KShillpgradubility.exe	
My Videos	LogMonitocese	4022 NG NG NG NG NG NG NG NG NG
NetHood	Si MedicalSummary.exe	42312 CAED als care data b COMCARANT chat along Chatter that another chatter
FCMH 2011	MSMQBostaller.eve	1922 Charles and a second seco
Printificed	R N09451-K82858728-dd-x64-A805-ENU	2/2/3
RCH Project	NextGen Letter Update Utility.eve	AGENT NG NG NG NG NG NG NG NG NG
		1022 North Contraction of the second se
Recent	- reproductive auto-and	
Recent	NetGen.EMILab.AutoRelease.exe	4/2/2 dm_admix_ dm_anual_ dm_anual_ dm_b_co dm_bh_ye dm_bh_ye
Recent Reaming Second German	NetGen/EMR.Lab.AutoRelease.exe NetGen/ExtEntClync.exe	4070 dm_admidm_amaildm_amaildm_amaildm_jh_codm_jh_jedm_jh_jedm_jh_je 4730 Cothededogr ¹
E Recent ■ Roaming ● Seved Games	NedGenEMLab.AutoRelease.exe NedGenEMLab.AutoRelease.exe NedGenEMLab.AutoRelease.exe NedGenEMLAdminUtility.exe	4323 decesy decision de june d
 Recent Reaming Search Games Searches Searches 	 NetGen.2015.00 NetGen.Patientlync.ex NetGen.RE.Lah.ukuRelease.exe NetGen.RE.AdminUtity.exe NetGen.RE.AdminUtity.exe NetGen.Den.Markate 	
El Recent Reaming B Secel Games Searches Searches Searches	Nettion.Sim.cl.yc.ex Nettion.BRLah.AutoRelease.exe Nettion.Patientlync.exe Nettion.RL.Administrity.exe Nettion.RL.Administrity.exe Nettion.RL.Administrity.exe Nettion.RL.Administrity.exe Nettion.RL.Administrity.exe	4572 Onclay Onclay 42014 Onclay Onclay 42014 Onclay Onclay 42014 Onclay Onclay 0 Onclay Onclay Onclay

Print a Consent Document

Use the **Consent Document** panel to define the document to be used when enrolling a new patient in the CCM program.

Consent Document	t	
Select document:		

1 Click the **Select document** field.

The list of documents opens.

E CCMListDocs	
document_name	
a_chm_addendum	_
a_chm_provider_order_signoff	
AB_Master	
ABN	
addendum	
AINF_Concussion_Note	
AINF_DME_only	
Ainf_office_visit	
Aint_office_visit_re_eval	
AINF_PUC_1	
AINF_PUL_2	
AINF_PUL_3	
AINF_FI_Cancel	
AINF_pt_telephone_call	
AINF_pt_treat_work_cond_note	
AINF_FT_treatment_aquatriet_note	
Aintaaan	
AINE script	•
Refresh	0K Cancel

2 Select CCM Consent, and click OK.

The name of the document populates the **Consent Document** field. This document is used any time you enroll a new patient in the CCM program.

Consent Document	ıt
lect document:	CCM Consent

Symptoms List

Use the **Symptoms List** panel to add and remove symptoms used to document the CCM Care plan for patients.

Symptom List	
Symptom:	Add
Symptom	
Abdominal pain	
Anxiety	
Chest pain	
Constipation	
Cough	
Depression	
Diarrhea	
Fatigue	
Feet swelling	
Fever	
Headache	
Hypoglycemia	
¢	Remove

Add Symptoms

- **1** Type the symptom in the **Symptom** field.
- 2 Click Add.

The symptom is added to the **Symptoms** list.

Remove Symptoms

- 1 In the **Symptoms** list, highlight the symptom you want to remove.
- 2 Click Remove.

The symptom is removed from the **Symptoms** list.

Care Plan Review (Patients that Have Been Reviewed)

Depending on the interval the practice has determined in the **Care Plan Review Interval** field, this panel displays all CCM enrolled patients that are due to have their Care Plan reviewed.

- The default is current day and a search screen allows you to search by date ranges or by patient.
- > Use the column headings to sort the contents of the grid and to toggle between ascending and descending order.

Care Plan Review (Patients That Have Been Review	ed)	
Care Plan Review Interval 1 Year NOTE*** Changing Interval Range will not change existing o	Designate work group for auto tasking on generation of care plan: (CCM Provider Test Action and CCM Care Plan Templates)	Clear
	Patients CCM Care Plan Review Schedule	
	From: / / To: / / Search	Open Chart
Additional Search Criteria's Due Today Reset	Due Date / Person Name Date Reviewed	Reset
Due Tomorrow Due Yesterday		
Search by Patient		
4	<u> </u>	Report: Patient's Due Date for Care Plan Review: Generate

Define the Care Plan Review Interval

The interval for reviewing the care plan in the templates is defined by default as 1 year (or 12 months).

1 Click the Care Plan Review Interval field.

The Care Plan Review Interval screen opens.



2 Do one of the following:

Enter the **Months**. In this example, enter **12**.

OR

- Enter **1 Year**.
- 3 Click OK.

The **Care Plan Review** Interval default for all CCM patients has changed to 12 months.



Important: Per CMS requirements, the longest interval for a CCM Care Plan not being reviewed is 12 months.

Designate a Workgroup for Auto Tasking of Care Plan Document

This field allows you to send a task to a workgroup stating the Care Plan document has been generated for the patient.

Care Plan Review (Patients That Have Been Reviewed)		
Care Plan Review Interval 1 Year NOTE*** Changing Interval Range will not change existing due dates.	Designate work group for auto tasking on generation of care plan: (CCM Provider Test Action and CCM Care Plan Templates)	

1 Click the field.

The list of workgroups displays.

Dce CCMDBP WORKG	ROUP	×
workgroup_name Admin Billing Staff Clinical Staff Front Office Group of the Morrow Physicians		
Refresh	OK	Cancel

2 Select a workgroup.

The workgroup name populates the field.

3 Click **Clear** to remove the workgroup.

Important: A task will not be sent if the field is blank.

Change the Grid Data Range

The grid display data range defaults to the current day. You can change the data range to view patients with care plans due for review for other dates.

1 Click the **From** field.

The **From** calendar opens.

4		Ju	ne, 2(017		Þ
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

- **2** Select a start date.
- 3 Click the **To** field. The **To** calendar opens.
- 4 Select a date range end.
- 5 Click OK.
- 6 Click Search.

The patients with care plans due for review within that date range populate the grid.

Quick Views (Additional Search Criteria)

The **CCM Practice Setup** template provides you with quick views, and they are listed in the **Additional Search Criteria** panel.

Due Today	Reset
Due Tomorrow	
Due Yesterday	

- To view care plans due for review today, click **Due Today**.
- > To view care plans due for review tomorrow, click **Due Tomorrow**.
- To view care plans that were due for review yesterday, click **Due Yesterday**
- > To clear the grid and enter additional criteria, click **Reset**.

Search for a Patient

1 Click the **Search for Patient** field.

The patient list displays.

CE Show POC Pati	ents Review		×
txt_person_name Care Test	bt_person_id A5E270EE-57C8-4932-BE83-96F1632CF00C		
Refresh]	OK. Cancel	

- **2** Highlight the patient name.
- 3 Click OK.

	Patients CCM Care Plan Review Schedule	
	From: / / To: / / Search	Open Chart
Additional Search Criteria's	Due Date 🖉 Person Name Date Reviewed	,
Due Today Reset	05/30/2018 05/30/2017	Reset
Due Tomorrow		
Due Yesterday		
Search by Patient		
Press - Rear		
		Report:
		a ration s due date for care Plan Review. Generate

> Click **Reset** to clear the grid data.

Open a Patient Chart from the CCM Care Plan Review Grid

1 Highlight the patient in the grid.

Pa	atie	ents CCM Care Plan Review Sche	dule	
	Fro	n: // To: // Sear	rch	Open Chart
Due Date	Δ	Person Name	Date Reviewed	
05/30/2018			05/30/2017	Reset

2 Click Open Chart.

The patient chart opens in the encounter where CCM eligibility was established.

You can print and export this report to Crystal reports. The report also allows you to search.

Generate a Care Plan Review Due Date Report by Date Range

- 1 To establish the date range, click **From** and select a date from the calendar.
- 2 Click **To** and select a date from the calendar.
- 3 Click Generate.

The Patient's Care Plan Review Due Date report appears,

	Patient's Care Plan Review Due Date					
	Start Date	through	End Date			
Due Date	Patient Name					
	Total Page No.: 1			Zoom Factor: 100%		

Common Phrase Configuration

Use this panel to define and manage common phrases specific to the CCM Management and CCM Care Plan templates. Common Phrases are available to all users who use the CCM templates.

CCM Common Phrase Configuration				
Qualifier One:	Qualifier Two:		All CCM C Removed	Add Del Update
List Item:				
Qualifier One	Qualifier Two	List Item		
CCM Goals	Qualifier 100	Goals note		
CCM Interventions		Intervention notes		

Add a New Common Phrase

1 Click Qualifier One.

The CCM Common Phrases list displays.

on Phrase Configuration	CCM Common Phrases
ntions	CCM Care Coordination CCM Goals CCM Intervention Progress CCM Interventions CCM Prognosis and Outcome CCM Provider Test Action CCM Symptom Management CCM Symptom Progress
	Close

2 Select the phrase to be added from the list.

The selection appears in the template

C	CM Common Phrase Configuration				
0	Qualifier One: CCM Care Coordination	Qualifier Two:		All CCM C Removed	Add Del Update
l	.ist Item:				
	,				
	Qualifier One	Qualifier Two	List Item		
	CCM Goals		Goals note		
	CCM Interventions		Intervention notes		

3 In the List Item field, type the item(s) that describe the phrase. For this example, type Coordinate nursing and respite care.

Note: Qualifier 2 is not used for common phrase configuration at this time.

4 Click Add.

The new phrase appears in the common phrase grid.

Qualifier One	Qualifier Two	List Item
CCM Care Coordination		Coordinate nursing and respite care
CCM Goals		Goals note
CCM Interventions		Intervention notes

> To edit or delete an existing common phrase, highlight the row in the grid, make the changes, and click **Update** or **Delete**.

CCM Administration Reports

Use this panel to generate CCM administration reports.

CCM Administration Reports			
CCM Population Management by Provider Report Generate	CCM Billing Summary Report (Generate	CCM Billing ICD9 Report Generate
CCM Population Summary Report Generate	CCM Service Type Utilization Report (Generate	

Currently, you can generate the following administrative reports from this panel:

- > CCM Population Management by Provider
- > CCM Population Summary
- **CCM Billing Summary**

- > CCM Service Type Utilization
- > CCM Billing ICD9
- > CCM Service Item

Generate a CCM Population Management Report

This report details all patients enrolled in CCM Services by PCP, type, and services provided for a specific date range.

1 Click the Generate button next to CCM Population Management by Provider Report. The Enter Parameter Values screen opens.

Enter Parameter Values		×
Enter start:	start	
Enter end:	end	
	OK Cancel	

- 2 Click **Enter start** and select a start date from the calendar.
- **3** Click **Enter end** and select an end date from the calendar.
- 4 Click OK.

The CCM Population Management by Provider report opens.

Chronic Care Management Population Management By Provider 6/9/2016 through8/9/2017					
der	Patient	Service Date	Service Type	Minutes	Provider
ia Hit	Family Pract	tice			
	nalita (1895) / Haalistaa Tiradii (Tiradii				
	1011-1022	5/24/2017	Coordinate with Home Health	25.00	The state in the contraction of
	10111-0000	5/24/2017	Provider Test Action	10.00	The state of the second second
	10111-0000	5/24/2017	Manage specialist visits	5.00	Topping (AF - million (
				40.00	
	100				
	10111-10101	6/1/2017	Diagnosis checkup	30.00	Theorem in the second second
				30.00	
	THE MONTH				
	100.000	6/2/2017	Coordinate referrals	20.00	Tendina (No. of Comp.)
	Tax / Realized	6/2/2017	Diagnosis checkup	65.00	Repairing 1 HT - stations in
	Tax / Review	6/2/2017	Coordinate referrals	20.00	The state of the opening of
	1011100	6/2/2017	Coordinate with Home Health	20.00	Theorem in the station of
				125.00	
	1005-1000				
	100111000	6/5/2017	Coordinate referrals	20.00	Toppfile (HE - protection ()
				20.00	

Generate a CCM Population Summary Report

This report summarizes the patients enrolled in CCM Services for a specific date range.

- 1 Click the Generate button next to CCM Population Summary Report.
- 2 Click Enter start and select a start date from the calendar.
- **3** Click **Enter end** and select an end date from the calendar.
- 4 Click OK.

The CCM Population Summary report opens.

	6/9/2016 through6/9/2017					
Provider	Patient	Enrollment Date				
Family Practice						
		614/2017				
		6/2/2017				
		5/24/2017				
		6/1/2017				
		6/2/2017				
		0.000.7				

Generate a CCM Billing Summary Report

This report summarizes the billing for all patients enrolled in CCM Services by service type and service date,

- 1 Click the Generate button next to CCM Billing Summary Report.
- 2 Click Enter start and select a start date from the calendar.
- **3** Click **Enter end** and select an end date from the calendar.
- 4 Click OK.

The **CCM Billing Summary** report populates.

я	Patient	Service Date	Service Type	Minutes	Status	Bill Date
16	Family Pract	tice				
10	a waa					
	No. inc.					
		5/24/2017	Coordinate with Home Health	25.00		
		5/24/2017	Provider Test Action	10.00		
		5/24/2017	Manage specialist visits	5.00		
			Total Minutes:	40	billed	05/24/2017
	10.000					
		6/2/2017	Coordinate referrals	20.00		
		6/2/2017	Diagnosis checkup	65.00		
		6/2/2017	Coordinate referrals	20.00		
		6/2/2017	Coordinate with Home Health	20.00		
			Total Minutes:	125	billed	06/02/2017
Tot	al	100000000000000000000000000000000000000		165		

Generate a CCM Service Type Utilization Report

This report shows all CCM services provided by type and by minutes for each service for a specific date range.

- 1 Click the **Generate** button next to CCM Service Type Utilization Report.
- 2 Click **Enter**, select a start date from the calendar.
- **3** Click **Enter**, select an end date from the calendar.
- 4 Click OK.

Chronic Care Management Service Type Utilization 6/9/2016 through6/9/2018							
Patient Name	Service Date	Service Type	Minutes	Provider			
0001							
Coordinate referrals							
- Replin - Revenues	6/2/2017	Coordinate referrals	20	The particular is the second pro-			
The American	6/2/2017	Coordinate referrals	20	The particular is the second pro-			
- 100 - 100 C	6/5/2017	Coordinate referrals	20	The price of the optimizers			
101-010	6/6/2017	Coordinate referrals	20	The state of the s			
		Total minutes:	80				
Coordinate with Home Health							
- 8 all - 1953	5/24/2017	Coordinate with Home Health	25	The particular is the contraction of the			
1000	6/2/2017	Coordinate with Home Health	20	100000148-000000			
		Total minutes:	45				
Diagnosis checkup							
1000 (- 10000)	6/1/2017	Diagnosis checkup	30	The particular is the organization of the			
- Table - Hereitelder	6/2/2017	Diagnosis checkup	65	Topping (44 - children in			
		Total minutes:	95				
Manage specialist visits							
1000	5/24/2017	Manage specialist visits	5	100000110-000000			
		Total minutes:	5				
Provider Test Action							
	5/24/2017	Provider Test Action	10	The property in the calculate of			

The **CCM Service Type Utilization** report appears.

Generate a CCM Billing ICD9 Report

This report shows all CCM services billed for a given period of time.

- 1 Click the **Generate** button.
- 2 Click **Enter start**, and select a start date from the calendar.
- **3** Click **Enter end**, and select an end date from the calendar.
- 4 Click OK.

The **CCM Billing ICD9** report appears.

ICD Description

Generate a CCM Service Item Report

This panel allows the practice to define the CCM service item to be used when processing charges for CCM services. The charge code is located in the Service Item Library.

С	M Service Item	
	99490	

1 Click the **CCM Service Item** field.

The **Select Procedure** window opens.

Select Procedure						×
Description:					OK	
Procedure:		Fee	\$0.00		Cancel	
Category:	All			•	Clear	
					Search	
Description					Procedure	
(tt-3)triiodthyro	onine tot				84480	
>85y no hx co	lo ca/rsn scope				G9659	
>85y scope of	thr rsn				G9661	
1 BODYTEME	2 >= 35.5CVV/IN 30MIN				4559F	
1 med visit in .	24mo				C9247	
1 pc oct pour	v built in conv				A6067	
1 pc ost pour	h w filter				A5057	
1 STAGE MO	HS UP TO 5 SPEC				17304	
1 stg.dist.hvp	ospadias ror				54322	
1>=risk or>=	mod risk for TE				G8972	_
1	·				<u>•</u>	

2 In the **Procedure** field, type the CCM service Item to search for (typically **99490**).

3 Click Search.

The results display in the procedure grid.

Select Procedure	:				×
Description:					ОК
Procedure:	99490	Fee	\$0.00		Cancel
Category:	All			•	Clear
					Search
Description				F	Procedure
CHRON CARE	E MGMT SRVC 20 MIN			9	9490
•					Þ

- **4** Highlight the procedure(s).
- 5 Click OK.

Note: If the item is not found, it must be configured in the Service Item Library. See Additional Configuration and Setup (on page 72) for more information.

CCM Billing Template

Use the CCM Billing template to set billing defaults for chronic care management services. The patient encounters that meet the CCM billing criteria are available to bill from here.

06/05/2017 05:28 AM : ***CCM Management * *CCM Billing x										
CCM Sidebar # Chronic Care Management	Chronic Care Mana Use this template to bill for	gement Billing or chronic care managemen	nt services. Only patio	ents that mee	t CCM b	illing criteria will be avai	lable to bill for.		<u></u>	
CCM Billing	Note: You may bill char	ges for all practices from th	is template. This opt	on is set on t	he CCM	System Setup template.				
CCM Population Dashboard	CCM Billing List									
CCM Opportunity Dashboard	To create a list of patients Use the left and right arro	Fo create a list of patients for which CCM services can be billed for, confirm the billing month and year range.								
CCM Practice Setup	To suspend a patient from CCM billing, highlight the patient in the Available to Charge queue and click Suspend. The patient will be moved to the Suspended Patients tab below and will not be eligible for billing until removed from that table.									
	To process the selected c	harges, click the Process Ch	arges button.							
	Note: Bulk billing is cur	rently set to bill charges im	mediately, which may	y have perform	mance c	onsequences for long pa	itient lists/larger p	ractices. This option	is set on the (
	ССМ Ы	illing month and year rang	e							
	Available to Charge				S	elected to Charge				
	Name	Practice	Provider	Time	[Practice	Provider	Name	Tin	
					ŀ					
									•	

The panels in the Chronic Care Management Billing template are as follows:

- > CCM Billing List
- > Payer Not Set
- Suspended Patients

Manage CCM Service Charges

The CCM Billing List allows you to generate a list of enrolled patients for which CCM services can be billed. It also provides access to the list of charges so they can be processed.

									A
	CCM Billing List								
То	create a list of patients f	for which CCM services o	an be billed for, confirm	m the billi	ing month	and year range.			
Us	e the left and right arrow	s to move patients from	the Available to Charg	e queue t	o to Select	ed to Charge queue.			
To be	suspend a patient from low and will not be eligil	CCM billing, highlight th ble for billing until remov	ne patient in the Availat red from that table.	ble to Cha	irge queue	and click Suspend. The J	patient will be moved to	the Suspended Patient	s tab
То	To process the selected charges, click the Process Charges button.								
No	Note: Bulk billing is currently set to bill charges immediately, which may have performance consequences for long patient lists/larger practices. This option is set on the								
	CCM bill	ing month and year ran	ge						
	Available to Charge				Selected to Charge				
	Name	Practice	Provider	Time		Practice	Provider	Name	Tim
					_				
					(\mathbf{b})				
									-
•						1			

1 Click the CCM billing month and year range field.

The CCM billing date ranges appear.

name	date_start	date_end			
June - 2017	20170601	20170630			
May - 2017	20170501	20170531			
April - 2017	20170401	20170430			
March - 2017	20170301	20170331			
February - 2017	20170201	20170228			
January - 2017	20170101	20170131			
December - 2016	20161201	20161231			
November - 2016	20161101	20161130			
October - 2016	20161001	20161031			
September - 2016	20160901	20160930			
August - 2016	20160801	20160831			
July - 2016	20160701	20160731			
June - 2016	20160601	20160630			
May - 2016	20160501	20160531			
April - 2016	20160401	20160430			
March - 2016	20160301	20160331			
February - 2016	20160201	20160229			
January - 2016	20160101	20160131			

- 2 Select a billing date range in the CCM billing month and year range, in this case June 2017.
- **3** The date range selected populates the field.
- 4 Select a billing date range in the CCM billing month and year range field.

CCM billing month and year range June - 2017

The **Available to Charge** grid on the left displays all the patient encounters that have qualified for CCM billing in the selected month. The patient name, practice, provider, and the amount of time used for CCM service are displayed in the **Available to Charge** grid.

Name	Practice	Provider	Time
Rea: 7746	Family Practice	1932-2012 (1999) - 1912 10	20

5 To bill, select the patient encounter listed in the **Available to Charge** grid and move to the **Selected to Charge** grid using the arrows.

CCM bil	CCM billing month and year range June - 2017									
Available to Charge				Selected to Charge						
Name	Practice	Provider	Time	Practice	Provider	Name	Time			
				* Family	Health 1995, Halling	New Test	20			
				Practice						
		Sus	pend			Process (harges			
CCM Billing for FQHC o	r RHC									
FQHCs and Rural Health	Clinic (RHCs) can only b	ill CPT 99490 (complex	CCM is not payab	le). Select if you want to p	rocess charges for a FQI	HC or RHC				

- **6** Do one of the following:
 - Click Process Charges. The programming reviews all selected patients individually. It looks for the number of service minutes total, if the moderate or high complexity MDM check box is checked, and the CCM provider. Dependent on these criteria a new encounter is created for the encounter date that the last CCM service was documented. A CCM charge is posted on that date for either non-complex (99490) or complex (99487/99489) CCM services

Note: If the practice is an FQHC or RHC program, select the **CCM Billing for FQHC or RHC** check box. This hides the Moderate or High Complexity MDM Provided check box and links on the CCM Management template.

This must be configured during the initial **Management** template setup.

OR

> Click Suspend.

The items selected are moved to the **Suspended Patients** grid and the billing for that patient is suspended until the status changes.

Suspended Patients			
Practice Name	Patient Name	Suspended By	Suspend Date
*NextGen Family Practice	New Test	NEXTGEN Admin	06/06/2017
J			
			Unsusper

For more information about the setup and configuration of codes for charges and billing, see *Additional Configuration and Setup (on page 72)*.

Payer Not Set

The **Payer Not Set** grid displays all patients enrolled in the CCM program that do not have a participating payer. The participating payer list is available on the *CCM Practice Setup* template. The **Payer Not Set** button is also available from the **CCM Population Management** grid.

P	ayer Not Set				
	Patients showing in grid belo	ow did not have thieir p	ayor set on the **CCM Manage	ment Template.	
	Name	Time	Provider	Bill Issues	Open Chart
	1000-000000	25	Reading AR. Thursday	No CCM payer assigned	
					Set Payer

Note: If a payer is not set on the *CCM Management* template, the patient appears in the **Payer Not** Set grid.

Use **Payer Not Set** grid to set a payer for a CCM encounter.

Set a Payer

- 1 Highlight the patient in the **Payer Not Set** grid.
- **2** Do one of the following:
 - > If the patient has previous encounters with an assigned payer, click **Set Payer**. The participating payer on the previous encounter is assigned as the **Approved** payer for the current and future encounters.

OR

> If the patient does not have previous encounters with an assigned payer, click **Open Chart** and set the payer in the patient's chart.

Note: The patient does not appear in the Available to Charge grid if a payer is not set.

Manage Suspended Patients

The **Suspended Patients** panel displays patients who are suspended from billing.

Suspended Patients				
Practice Name	Patient Name	Suspended By	Suspend Date	
*NextGen Family Practice	New Test	NEXTGEN Admin	06/05/2017	
			Unsuspend	

> To suspend a patient from CCM Billing, select the patient in the **Available to Charge** queue, and click **Suspend**.

The patient record is moved to the **Suspended Patients** grid and is not eligible for billing until removed from that table.

To unsuspend patients, select the patient in the **Suspended Patients** grid, and click **Unsuspend**.
CHAPTER 5

Complete the CCM Patient Encounter

1 While in a patient encounter, click **EEE**. on the side bar. The **Select Template** screen opens.

Select Template	<u>></u>
Medical Records	Demographics
"Checkout "Finalize "Histories "Home Page "Intake "SQAP "Summary	
Show C All C Preferred	Categories 🗖
	0K. Cancel

- 2 Click Intake.
- 3 Click OK.

The **Intake** template opens and the and a picklist of specialties displays.

4	06/12/2017 07:36 AM : "*Intake" 🗙		Igkbm Get Dbpicklist Items	×	4
Navigation	Specialty v select a specialty	Visit Type 🔻 select a visit type	List Item Allergi & Immunology Ambulatorg Surgery Behavioral Health Cardology Care Management Dental		
	Care Guidelines Global Days		Dematology Family Practice Gastroenterology General Surgery		Cycle 🗷
	Review of Systems		Gynecology Internal Medicine		\odot
	General		Neprology		$\overline{\mathbf{O}}$
	Reason for Visit		Neurosurgery		\odot
	Do not launch HPI		Oncology		Comments
		Reason for Visit Histo	Orthopedics	_	
			Refresh	OK Cancel	
		-			
					-

- 4 Click Internal Medicine.
- 5 Click OK.

The **Visit Types** list displays.

Jkbm Udp Visit Types		
visit_type		
Chart Abstraction		
Chart Update		
Consult		
Coumadin Visit		
Domiciliary Visit, Est		
Domiciliary Visit, New		
House Call, Est		
House Call, New		
Inpatient Initial		
Inpatient Subsequent		
Medical Clearance, Consult		
Medical Clearance, Visit		
Medicare Preventive		
No-Show		
Nurse Visit		
Nursing Facility, Annual		
Nursing Facility, Initial		
Nursing Facility, Subsequent		
Office Visit		
Befresh	ПK	Cancel
Therear	Wix.	

- 6 Click Office Visit.
- 7 Click OK.
- **8** Enroll the patient as a Chronic Care Management program participant in the CCM Management template.

CHAPTER 6

CCM Management Template

Use the **CCM Management** template to enroll a patient in the CCM program and provide payer, billing diagnoses and service logging.

> In the CCM patient encounter, click the **CCM Manage** link.

The **CCM Management** template opens.

۸ /	06/12/2017 07:36 AM : "*Intake"	06/12/2017 07:36 A	M : "**CCM Management"	×			
»		10 I. T	CL				
Vavi	Specialty V Internal Medicine	Visit Type 🔻	Chart Update				
gatio	fi Intake	Histories	SOAP	Finalize	Checkout		_
2							
						Care Plan Ter	mplate
						Panel Control: 🕤 Toggle 🕥 🔹 🤇	ycle 🔳
	Enrollment Status: Patient not	currently enrolle	d in chronic care man	agement			۲
	Enrolling with provider		184	No. 7 No. 44			
	Enrolling with practice		1000	Family Practice			
	Enrolling at location		Fam	ily Practice Location			
	Patient must be recorded as giving c	onsent to receive c	hronic care management :	services. Print documer	nt and provide for patier	nt to review	
	Print CCM Consent	gave consent to re	ceive CCM services				
	Enroll in CCM CCM Se	rvices Declined					
	Payer Payer not set						$\overline{\bullet}$
	CCM Billing Diagnoses 0 chronie	c conditions selecte	ed for CCM billing.				$\overline{\bullet}$
	,,						~

The information in the CCM Management template includes:

- > CCM Enrollment Status
- > CCM Payer
- > CCM Billing Diagnoses
- CCM Service Logging
- > CCM Telephone Call History

Define a CCM Payer

The **Payer** panel in the **CCM Management** template defines the payer to use for a patient on CCM matters.

Payer	Payer not set	
	Select the payer to be used when billing chronic care management services. This picklist is limited to active payers in the patients chart and payers that are set up as chronic care management payers in the practice template.	
		Clear

1 Click the **Payer** field.

The **CCM Payer** picklist opens.

DCE CCMPayerPicklist	×
Payer Name	
Medicare	
Refresh	0K. Cancel

2 Select the payer to be used for CCM billing, and click OK.The CCM payer is now set and will be used for all CCM billing for the patient.

Payer	Medicare	
	Select the payer to be used when billing chronic care management services. This picklist is limited to active payers in the patients chart and payers that are set up as chronic care management payers in the practice template.	
	Medicare	Clear

CCM Billing Diagnoses

Use the CCM Billing Diagnoses panel to define the conditions that are chronic. In order for the patient to participate in the CCM program, you must define at least 2 chronic conditions.

CCM Billing Diagnoses 0 diagnoses selected for CCM billing.								
pecify the chro lighlight the cl	onic condition diagnoses that will be used to bill Chronic Care Services. At least two hronic condition diagnosis in the table and use the "Select for Billing" button to fla	must be selected in order for C g the diagnosis for billing. Use th	CM to bill. he remove l	outton to ur	nflag the diagnos	is for		
C All Diagno:	sis 💿 ICD 10 Only 💿 Chronic 🔿 All							
Diagnosed	Description	Code	Flagged	Icd 9 10	Resolved	1		
	Type 2 diabetes mellitus without complications	E11.9		10				
	Unspecified asthma, uncomplicated	J45.909		10				
	Essential (primary) hypertension	I10		10				
	🗖 Submit G0506 Code 🕢	Add		Refresh)			

Add CCM Diagnosis for Billing

- 1 Click a diagnosis to set it for CCM billing.
- 2 Click Select for Billing.

The selected diagnoses are flagged to **Bill** in the **CCM Billing Diagnoses** grid and to be processed monthly.

_							
¢	CM Billing Di	agnoses 1 chronic conditions selected for CCM billing.					۲
S F	pecify the chror lighlight the chr Ĉ All Diagnosi	ic condition diagnoses that will be used to bill Chronic Care Services. At least two must be selected i onic condition diagnosis in the table and use the "Select for Billing" button to flag the diagnosis for © ICD 10 Only © Chronic © All	n order for CC billing. Use the	M to bill. e remove b	outton to unfl	ag the diagnos	is for billing.
	Diagnosed	Description	Code	Flagged	Icd 9 10	Resolved	
	06/12/2017	Essential (primary) hypertension	110	Bill	10		
	06/12/2017	Type 1 diabetes mellitus w/ complication	E10.8		10		
		🗌 Submit G0506 Code 📵	Add		Refresh		

Notice also that the panel header reflects there is **one** chronic condition.

3 Click Add.

The **Problems** module displays.

- 4 Add pertinent chronic conditions appropriate for the CCM program. These items must be in the **Billing ICD List** and marked as chronic.
- 5 Close the **Problems** module.
- 6 Return to the **CCM Management** template.
- 7 Click Refresh.
 - > Any time you add or update a diagnosis in the Problems module, click **Refresh**.

Submit G0506 for Billing

Practitioners who furnish a CCM initiating visit and personally perform extensive assessment and CCM care outside the usual effort described by the initiating visit code may also bill G0506. G0506 is reportable once per CCM billing practitioner in conjunction with CCM initiation.

Note: G0506 cannot be used for FQHC and RHC.

1 Click the **Submit G0506 code** check box to submit this charge.

The Submit Procedure alert window displays.



2 Click Yes.

The date that the G-Code Submitted displays.

🔞 G Code Submitted: 04/26/2017

CCM Service Logging

Use the **CCM Service Logging** panel to log CCM billable times and services.

CCM Service Logging 0 total CO	CM minutes month t	o date.				Year to Date	e Service Log	۲
Select the chronic care management	t type, the minutes sp	ent to provide it, the date it w	as provided, the m	inutes spent to	perform, and details of t	he service p	rovided.	
CCM service type:		cci	M service date:	11	Minutes to perform:		Timer: (Start
					Common Phrases	My Phrases	5 Manage	My Phrases
Service notes								* *
Moderate or High Level MD View MDM Guidelines View					C	Clear	Add	
Services Provided This Month					View Service Histo	ory Crea	ite Service Hi	story Repor
Service Date Minutes Service	Type Servic	e Notes			Logged By	Un	der Provider	

Notice that in the panel header, it indicates 0 total CCM minutes month to date.

1 Click the **CCM service type** field.

The CCM service type list opens.

D	CE CCMServiceDisp	X
	Itst_service_desc Coordinate referrals Coordinate Transportation Coordinate with Home Health Diagnosis checkup Manage services Manage services Manage stensition care Medication checkup	
	Refresh	0K Cancel

- **2** Click the service type for this entry.
- 3 Click OK.
- 4 Click the **CCM service date** field. The date picker opens.
- 5 Select the date the CCM service was rendered. For example, **Today**.
- 6 Click OK.
- 7 Click the **Minutes to perform** field.

The **Number Pad** displays.

8 Using the **Number Pad**, enter the number of minutes for today's service.

Important: The minimum payable time is 20 total CCM billable minutes per month.

9 Click OK.

CM Service Logging O total CCM minutes month to date. Year to Date Service Log												
select the chror	nic care mar	nagement type, the min	utes spent to provide it, the da	te it was provided, the	minutes spent to	o perform, an	d details of t	f the service provided.				
CCM service	type: Di	agnosis checkup		CCM service date:	06/13/2017	Minutes to	perform:	20	Timer:	Start		
						Commo	n Phrases	My Phra	ises Manag	e My Phrases		
Service	notes									4		
Moderate or High Level MDM provided Wiew MDM Guidelines View Risk Table									Clear	Add		
Services Provided This Month View Service His						Service Histo	ory C	reate Service	History Report			
Service Date	Minutes	Service Type	Service Notes				Logged By		Under Provid	er		

Note: Click **Start** if you want to start the timer. When you are done, click **Stop**. This time populates the Minutes to perform field.

10 Click the **Service notes** field to type free-text. For this example, type **Check the second set of test results**.

You can use the **Common Phrases** and **Manage My Phrases** hyperlinks above the Service notes to expedite the process. The Common Phrases are defined in the *CCM Practice Setup template* (on page 9).

11 Click the **Moderate or High Level MDM provided** check box when moderate or high complexity medical decision-making is provided during the billing month.

This also flags the processed charges to use the complex codes 99487 / 99489 instead of 99490 if 60 or more service minutes are documented.

Note: If the practice is set up for RHC or FQHC in the CCM Billing template, this section is hidden since it does not qualify for Moderate or High Level MDM.

¹² Click Add.

CCM Service	Logging	21 total CCM minutes	month to date.		Yes	ar to Date Service Log 📀
Select the chro	nic care ma	nagement type, the min	utes spent to provide it	the date it was provided, the minutes spe	nt to perform, and details of the	service provided.
CCM service	type:			CCM service date: //	Minutes to perform:	Timer: Start
					Common Phrases M	y Phrases Manage My Phrases
Service	notes					~
T Moder	ate or High	Level MDM provided	0			Clear Add
Services Provi	ded This N	Aonth			View Service History	Create Service History Report
Service Date	Minutes	Service Type	Service Notes		Logged By	Under Provider
06/20/2017	6	Manage specialist visits			1.2.4	Ballin Balling
06/20/2017	5	Medication checkup				
06/20/2017	10	Coordinate Transportation				
			R			
-						
	and Call I	liston			La	inch CCM Telephone Call

The details are added to the Services Provided This Month grid.

Services provided for the current month populate the grid.

Important: Notice that the CCM Service Logging header has changed from red to green and it shows the total CCM billable minutes for the period.

13 Click **View Service History** to view service history details filtered by start and end dates. The **CCM Service History** report module opens.



14 Use the calendars to enter a **from** and a **to** date.

The **CCM Service History** report results populate the grid.



15 Scroll to the very bottom of the template and click **Care Plan Template**.



The CCM Care Plan template for the encounter appears.

Generate a CCM Service History Report

> To generate a CCM Service History Report, click the **Create Service History Report** hyperlink.

Patient Name						
DOB: 10/10/1957			Sex F	Person #	1604	
CCMEnrollment	Date: 04/26/	2017				
Service Date	Minutes	Service Type	Service Notes		Logged By	Provider
06/20/2017	6	Manage specialist visits				
06/20/2017	5	Medication checkup				
6/00/2017	10	Coordinate Transportation				

Add a CCM Telephone Call to the History

Use this panel to document any telephone calls made on behalf of the CCM patients and their care.

CCM Telep	ohone Call His	story			Launch CCM Telephone Call	\odot
Date	Contact Time	Contact By	Reason	Concerns/Issues	Comments	Emplo
06/15/2017	9:30 AM		Other	CCM		NEXTG
•						Þ
					Care Plan T	emplate

To add a CCM telephone call, click the **Launch CCM Telephone Call** hyperlink.

The **CCM Telephone** template displays.

• /	06/12/2017 07:36 AM : "*Intake" 06	5/12/2017 07:36 AM : "**CCM Telephone" 🗙 📗	06/12/2017 07:36 AM : "**CCM Provider Test Action" X *CCM Billing 06/12/2017 07:36 AM : "**CCM
Navigation	Contact type: Outgoing call Urgeng: by noon Date of call: D6/21/2017 11:50 AM	Spoke with: Patient Name: Relationship: mother +HIPAA After hours	Contact Information: Care Mgmt. Template Care Plan Template Home: Alternate: Ext: Day: Ext: C Utility: C C Other: (this call only) Email: C () - Email:
	Active Medications		Current Problems
	Medication	Sig Description	Dx Code Diagnosis Date Diagnosed Chronic
	Topamax 100 mg tablet	1 tablet by Oral route 2 times per	er day 110 Essential (primary) hypertension / / Y
			x. >
	Communication: 🔽 Chronic Care	Mgmt	Actions:
	CCM service type: You MUST enter minutes befor Sort By: © Summary © Phrase CO (Meds/Allergies/Chronic Problem	e you can send CCM!!!! Duration: CM Service Common Phrases My Phrases Mana	Defails: Completed: Schedule appointment:

CHAPTER 7

CCM Care Plan Template

Use the **CCM Care Plan** template to document the patients comprehensive care plan for all health issues, with particular focus on the chronic conditions being managed.

4	06/12/2017 07:36 AM : "*Intake"	06/12/2017 07:36 #	AM : "**CCM Management"	Problems	06/12/2017 0	7:36 AM : "**C	CM Care Plan"	<	
>>									4
Na	Specialty v Internal Medicin	e Visit Type	 Chart Update 						
vigati	ft Intake	Histories	SOAP	Finalize		Checkout			
3									
				Gaper	ate Care Plan:			O Teasle O	Task
				Gener	ite care rian.	Generate	Panel Control:	(loggie	• Cycle
	Recent ER Visits and Hospita	lizations							۲
	ER Visits Location:		Date: /	// Diagnosi					
	Diagnosis Comment:							Clear	Add
	Location	Date	Diagnosis / Comment fo	or Visit					
	Comment:						~		Remove
	·						_		
	Perent Hospitalizations Location		Admit date:		ccharge date:		D/C diagnosis:		
	Recent hospitalizations Education		Admit date.		scharge date:	1 //	D/C diagnosis:		
	Diagnosis Comme	nt-						Clear	Add

The CCM Care Plan information includes:

- > Recent ER Visits and Hospitalizations
- > Care Coordination Team
- > Problems List
- > Prognosis, Expected Outcome, and Goals
- > Interventions
- > Symptom Management
- > Care Coordination Plan
- Medications
- Social, Functional and Environmental Assessment
- Mental and Cognitive Assessment
- > CCM Care Plan Review
- > Goals

Recent ER Visits and Hospitalizations

Use this section to enter any recent visits to the emergency department and hospitalizations.

Care Coordination Team

Use the care coordination team panel to enter the details of the CCM care coordination team.

Agencies	Show All Practice Agencies Agency name: Phone: () -	Agency type: Faxc () -	Add Clear
Agency Type		Agency Name	Agency Phone Agency Fax
Interdisciplinary team	Show All Practice Teams		
Interdisciplinary team	Show All Practice Teams Name:	Role:	Add Clear
Interdisciplinary team	Show All Practice Teams Name: Phone: () -	Role: Location:	Add Clear
Interdisciplinary team	Show All Practice Teams Name: Phone: () - Name	Role: Location:	Add Clear

Add an Agency

1 Check **Show All Practice Agencies** to display all agencies configured on the CCM Practice Setup template in the Agency name list.

If this box is not checked, the Agency name list only shows location specific items.

2 Click the Agency name field.

The list of agencies configured on the CCM Practice Setup template displays.

Note: The agency list is location specific. If an agency does not display for the current location reference the CCM Practice Setup template to ensure the agency is mapped to the current location you are using

- **3** You can select an agency or type in the details.
- **4** Enter the details for the agency you are adding.
- 5 Click Add.

The agency details are listed in the Agencies grid.

Add an Interdisciplinary Team

1 Check **Show All Practice Teams** to populate all interdisciplinary teams configured on the CCM Practice Setup template.

If this box is not checked, the Name list only shows location specific items.

2 Click the **Name** field.

The list of agencies configured on the CCM Practice Setup template opens.

Note: The Interdisciplinary Team list is location specific. If an Interdisciplinary Team does not display for the current location reference the CCM Practice Setup template to ensure the Interdisciplinary Team is mapped to the current location you are using.

- **3** You can select a team or type in the details
- 4 Enter the details for the team you are adding.
- 5 Click Add.

The interdisciplinary team is added to the grid.

Update a Care Coordination Team Details

- > To refresh or update an item from the grid, highlight the row.
- Vpdate the details.
- Click Update.

The details are updated in the grid.

Delete items from the Care Coordination Team Grid

- **1** Highlight the row you want to remove.
- 2 Click Remove.

The row is deleted from the grid.

Problems List

Use the **Problems List** grid to display the various chronic problems and diagnoses for the patient.

Problem List	0									۲
Show chronic	Show my tracked	problem							No active problems	Reviewed
Last Addressed	Problem Description	Onset Date	Chronic	Secondary	Clinical Status	Provider	Location	Notes		
								~		
								C Refres	h) Add	Update

Problems List Grid

- To only display chronic conditions, click the **Show chronic** check box.
- To document clinical and chronic problems, click the **Show my tracked problem** check box.
- To display only problems that are currently active, click the **No active problems** check box.
- To display only chronic conditions that have been reviewed, click the **Reviewed** check box.
- To populate the contents of the Problems List with current information, click **Refresh**.

Prognosis, Expected Outcome and Goals

Use the **Prognosis, Expected Outcome and Goals** panel to document the prognosis and expected outcome for the CCM patient.

Prognosis, Expected Outcome	e, and Goals			۲
Problem:				
		Common Phrase	s My Phrases	Manage My Phrases
Prognosis/Expected Outcome			-	
		Common Phrase	es My Phrases	Manage My Phrases
Measurable goals:				
	To add as a NEW value select >>> Add	1		Clear
Most Recent Entry		History of Pro	gnosis, Expecte	d Outcome, and Goal
Problem Prognosis	/Expectations	Goals	Last Update	Date Assigned
]				

Interventions

Use the **Interventions** panel to document interventions linked to the completion of a goal in the CCM Care Plan.

Interventions							۲
Problem:							
	-				Common P	hrases My Phrase	s Manage My Phrases
Intervention:							
Status:		Responsible	Team Member:		Ro	le:	
Start Date:	/ / Fr	equency:		Next Inte	rvention Due: / /	/ Review I	Date: / /
					Common P	hrases My Phrase	s Manage My Phrases
Progress:							
		To add as a NEW va	lue select >>>	Add			Clear
					pleted only 🔿 Compl	eted only 💿 All	Intervention History
Problem Intervention	Status	Complete	Start Date	Frequency	Progress	Assigned To	Role Se
							Þ

Symptom Management

Use the **Symptom Management** panel to document and manage the symptomology linked to a chronic condition.

anagement						(
Symptom:						
				Common Phrases	My Phrases Man	age My Phra
Management plan:						
				Common Phrases	My Phrases Man	age My Phra
Progress notes: Clear						
					Add	Clear
Symptom	Management Plan		Progress			
	anagement Symptom: Management plan: Clear Progress notes: Clear Symptom	anagement Symptom: Management plan: Clear Progress notes: Clear Symptom Management Plan	anagement Symptom: Management plan: Clear Progress notes: Clear Symptom Management Plan	anagement Symptom: Management plan: Clear Progress notes: Clear Symptom Management Plan Progress	anagement Symptom: Common Phrases Management plan: Common Phrases Clear Common Phrases Progress notes: Common Phrases Clear Symptom Management Plan Progress	anagement Symptom: Common Phrases My Phrases Man. Management plan: Clear Common Phrases My Phrases Man. Progress notes: Clear Add Symptom Management Plan Progress

Care Coordination Plan

The **Care Coordination** template provides a focal point for patient care information gathered from all members of the patient care team and available for review by those team members.

Care Coordination Plan		۲
Coordination with:		
	Commor	n Phrases – My Phrases Manage My Phrases
Care coordination comments:		*
Clear		
		T
		Add
Coordinated With	Coordination Comments	Date
		•

Add a Care Coordination Plan

1 Click the **Coordination with** field.

The CCM coordination window appears.



- **2** Select a caregiver from the list.
- 3 Click the Care coordination comments field.
- 4 Use the **Common Phrases** and **My Phrases** to assist in entering the care coordination comments.
- 5 Click Add.

The details are added as a row in the Care Coordination Plan grid.

Update a Care Coordination Plan

- **1** Highlight the line item to be updated in the grid.
- **2** Type in the updated details.
- 3 Click Update.

The line item is updated.

Delete a Care Coordination Plan

- 1 Highlight the line item you want to remove in the grid.
- 2 Click Delete.

The line item is removed from the grid.

Medications

Use the **Medications** panel to document the medications prescribed to a chronic care patient.

Medications 🧭	$\overline{\mathbf{O}}$
Patient status:	◆ Comment □ No medications this encounter □ Medications reconciled
Medication	🖉 Sig Description
Topamax 100 mg tablet	1 tablet by Oral route 2 times per day
	(Add/Update) (Reconcile)

Review Medications in the Grid

- > You can sort the contents of the **Medication** grid by clicking a column heading. Use it also to toggle from descending to ascending order.
- > To indicate that the patient was not prescribed any medications, click the **No medications this encounter** check box.
- > To indicate you have reconciled the medication list, click the **Medications reconciled** check box. You can do a more detailed reconcile by using the **Reconcile** popup template.
- To indicate that the medication list has been reconciled, click the **Medications reconciled** check box.

Note 1: To do a more detailed reconcile, use the **Reconcile** popup template. **Note 2:** Checking this box does not change the display in the **Medication** grid.

To open the **Medication Review** module, click **Reconcile**.

Complete the Medication Reconciliation for Patient template.

Add a Medication to the Grid

1 Click Add/Update.

The **Medication** module opens.

RX	Medication Module								
240	🚺 🕼 🖳 NextGen 🔹 🛞 Grid Preferences		18 year Old Male No Rx eligibility status						
Rxz	Status PDR Medication Name	Generic Name Original	Il Start Start Date V Stop Date Sig						
lote \	Status: Active (1 item)								
view	Active V Topamax 100 mg tablet	TOPIRAMATE 04/20/2	2016 04/20/2016 1 tablet by Oral route 2 times per day						
_									
	Prescribe New A Print Send Renew - D Interacti	ons 👻 🖄 Stop 👻 🕜 Resources 😴 Dose Range 🗌 💥 🛙	Delete Rx Eligibility Medication History						
			· · · · · · · · · · · · · · · · · · ·						
	Topamax 100 mg tablet								
	Sig: 1 tablet by Oral route 2 times per day Edit Sig Remove S	йg	topiramate						
	PRN Reason:		Accept Cancel (Topamax)						
	Quantity: 0 Units: Tablet	Refills: 0 Dispense As Written	E.II Devertier Information						
	Start: 04/20/2016 Stop: 06/14/2017 V	uration: Problem:	<u>Full Prescribing information</u>						
	Non-Clinical This field is for nonclinical comments to the pharmacist. Any additional clinical instructions for this prescription si	hould be	Select Medications in PDR						
	Pharmacy: added using the 'Additional Instructions' segment of the	sig Builder.							
	Provider:		Terms of Service						
	Location:								
	Note: Add Note								

2 Add the prescription(s) for the chronic condition.

3 Return to the **CCM Care Plan** template.

The newly prescribed medication populates the grid.

Complete the Medication Reconciliation for Patient

Medication reconciliation is a review of patient adherence to prescribed medications. Reconciliation can be performed by comparing two lists (i.e., using the Electronic Reconciliation option) or by checking the **Manual Reconciliation** check box. This means you may have a paper chart that you are comparing to the patient's current medication list or that you are documenting adherence to an existing medication list if there are no external sources to reconcile. Medication reconciliation is performed in situations including, but not limited to, the following:

- > New patients
- > Periodically for established patients
- > After a hospitalization or emergency department visit
- > After care by another provider
- > Whenever the provider thinks necessary

The ability exists to perform medication reconciliation manually or electronically.

> To review the patient's medications and perform a medication reconciliation, click the **Reconcile** button.

The **Medication Review** pop-up template opens.

- The **Medication Review** panel contains two grids.
- > The **Medication List** grid contains a list of current medications that need to be reviewed for patient adherence.
- > The **Medication Review** grid displays reviewed medications.

econciliation Type anual reconciliation Type anual reconciliation Completed Electronic reconciliation: Bedication Module Hedication Review To move items from the Medication List to Medication Review, select the checkbox and click individual grid rows, or 'Review All - Taken As Directed' button. Medication List Review - adherence: Medication Sig Desc Cough & Cold 30 mg-100 mg-250 mg Cough & Cold 30 mg Cough	oggle 💿 🔹 Cycle
Panel Control: Toggle Conciliation Type anual reconciliation: Manual medication recondiliation completed Electronic reconciliation: Electronic Reconciliation: Electronic Reconciliat	oggle O r Cyde
conciliation Type anual reconciliation: Manual medication reconciliation completed edication Module edication Review for more items from the Medication List to Medication Review, select the checkbox and click individual grid rows, or 'Review All - Taken As Directed' button. dedication List Review - adherence: Image: Medication List Cold 30 mg-10 mg-250 mg Sig Desc Cough & Cold 30 mg-10 mg-250 mg Last Refilled Tylenol 325 mg tablet take 1 tablet by oral route every 4 hours as needed	inic Reconciliation o
anual reconciliation: Manual medication reconciliation completed Electronic reconciliation: Electronic Reconcin: Electronic Reconciliation:	inic Reconciliation
edication Module edication Review For more items from the Medication List to Medication Review, select the checkbox and click individual grid rows, or "Review All - Taken As Directed" button. Medication List Review - adherence: Medication Medication Sig Desc Last Refilled Cough & Cold 30 mg-10 mg-250 mg Cough & Cold 30 mg Cough & Coug	©
edication Review for move items from the Medication List to Medication Review, select the checkbox and click individual grid rows, or "Review All - Taken As Directed" button. Medication List Review - adherence: Medication Sig Desc Last Refilled Cough & Cold 30 mg-10 mg-250 mg Cough & Cold 30 mg-10 mg-250 mg Cough & Cold 30 mg-10 mg-250 mg Cough 325 mg tablet take 1 tablet by oral route eveny 4 hours as needed Go to Medication Module above to add/edit medication list. Review All - Taken A	Taken As Directed
To move items from the Medication List to Medication Review, select the checkbox and click individual grid rows, or "Review All - Taken As Directed" button. Medication List Review - adherence: Medication Sig Desc Cough & Cold 30 mg-10 mg-250 mg copsule Tylenol 325 mg tablet Go to Medication Module above to add/edit medication list. Review All - Taken -	Taken As Directed
Go to Medication Module above to add/edit medication list. Review All - Taken	Taken As Directed
Medication Sig Desc Last Refilled Cough & Cold 30 mg-10 mg-250 mg capsule and	Taken As Directed
Capsule take 1 tablet by oral route every 4 hours as needed Go to Medication Module above to add/edit medication list. Review All - Taken	Taken As Directed
Internol 325 mg tablet Tablet by oral route every 4 hours as needed Go to Medication Module above to add/edit medication list. Review All - Taken	Taken As Directed
Addication Review	
Adherence Medication Name Sig Desc Start Date Stop Date Rx Else Last Refille	t Refilled Status

Review Medications Manually

- 1 Select the **Review adherence** check box above the Medication List grid.
- 2 In the **Review adherence** picklist, select a patient adherence comment or select the top blank line and manually type a comment.
- **3** To review all the medications in the Medication List, click the **Review All Taken As** directed button.

The medications move to the Medication Review grid below the Medication List.

Note: To review one medication at a time and select a different adherence for each, select one row at a time in the Medication List. Each medication selected moves to the Medication Review grid. To move a medication from the Medication Review grid back to the Medication List, select the medication and click **Remove**.

Update the Adherence of a Medication

- **1** Select the medication in the grid.
- 2 Select the adherence in the **Adherence** picklist.
- 3 Click Update.
- 4 In the **Reconciliation Type** panel, select the **Manual medication reconciliation completed** check box, and enter any additional information.

Review Medications Electronically

1 Click the **Electronic Reconciliation** button.

Reconciliation Type	۲
Manual reconciliation: 🔲 Manual medication reconciliation completed	Electronic reconciliation:
Medication Module	
Double click and to add/edit Medication Module	a management

The Clinical Reconciliation module opens.

2 On the **Import** tab, select the Surescripts® medication history file.

Note: You cannot import a Surescripts medication history file without first documenting patient consent in the **Medication** Module.

- **3** Document who confirmed the medication list.
- **4** Perform a reconciliation between the medications in the **EHR** panel and the Surescripts file medications.

Note: The ability exists to also complete the reconciliation from the **Medication** module using the **Medical History** and **Reconcile** buttons.

Reference: For more information on clinical reconciliation, refer to the Clinical Reconciliation Module section in the *Clinical Modules Guide for NextGen Ambulatory EHR*.

5 Click Confirm.

DUR interactions display.

6 Click Close.

The Medication List in the **Medication Review** panel displays any updates or additions.

- 7 Document the patient adherence.
- 8 After completing a manual or electronic medication review, select the **Transitioning into care** check box and/or the **Summary of care received** check box to document patient status.
- 9 Click Save & Close.

The **Medications reconciled** check box in the **Medications** panel appears selected.

Complete the Social, Functional, and Environmental Assessment

Use the **Social, Functional, and Environmental Assessment** panel to document the CCM patient's social and confidential histories.

tory Review						⊙ Last d	locumented – O Al
Substances	Encounter Date	Tobacco Use	Tobacco Type	Smoking Status	Usage Per Day	Pack Years	Date Quit
Tohacco							
Alcohol/Caffeine							
Statuses							
Lifestyle							
Occupation							
Comment	Encounter Date:T	ime					

The social history includes the patient's:

- > Relationships
- > Home environment
- > Education
- > Nutrition/Elimination

The confidential history includes the patient's

- Substance abuse history
- > Psychiatric/placement
- > Sexual practices
- > Child abuse

Each of these components can be accessed using the hyperlinks in the left pane.

1 Click the **History Review** hyperlink.

The **History Review** window displays.

Aed/Surg/Interim Hx:	C Detailed document	C Reviewed, no changes	
	C Reviewed, updated	C History unobtainable:	
Family:	C Detailed document	C Reviewed, no changes	
	C Reviewed, updated	C History unobtainable:	
Social:	Oetailed document	C Reviewed, no changes	(last updated 06/12/2017)
	C Reviewed, updated	C History unobtainable:	

The **History Review** window provides three history classifications:

- > Med/Surg/Interim Hx
- > Family
- Social
- **2** For each of these classifications, select the type of history review you are performing:
 - > Detailed documented
 - > Reviewed, no changes
 - > Reviewed, updated
 - > History unobtainable
- **3** Once you have completed your selections, click **Save & Close**.

The Social, Functional, and Environmental Assessment panel appears. The date of the last review appears to the right of the History Review hyperlink.

(last updated 06/22/2017) History Review

Add Social and Confidential History Details

1 Click Add.

The Social History windows opens.

Tobacco	C Detailed document C Reviewed, updated C Reviewed, no changes C History unobtainable
Relationships	
Home Environment	Age: 18 years 5 months Historian: Last updated/detailed doc: //
Education	Preferred language: Arabic
Nutrition/Elimination	Child Gurr
Comments	Unito Care:
	Mother Daycare
A dealer of a start of the second	□ Father □ Sitter □
Adult Social History	Grandparent Self relative:
	Sibling Relative:
	Nanny Neighbor/friend
	Relationships:
	Resides with:
	Primary: Maternal depression screening result discussed
	Parents' marital status:
	Time spent: Add Multiple birth: C No C Yes
	Secondary:
	Siblings: How many?
	Time spent: Add Relationship with sibling(s):
	Cooperates with family/friends: O No O Yes
	Parent/guardian relationship / Occupation Cooperates with teachers: O No O Yes
	Has enough triends: O No O Yes
	Has triends or both sexes: O No O Yes
	Concerns about relationship with family/friends/others: C No C Yes
	Tobacco Exposure:
	Smokers at home? O No O Yes

2 Enter all the required details.

3 Click Save & Close.

You are returned to the **CCM Care Plan** template. The social history entry has been added to the grid.

Social, Functional, and	Environmental Assessme	ent			۲
History Review				(last updated 06/1	12/2017)
 Relationships Home Environment Education Nutrition Comment 	Encounter Date:Time Primary residence	06/12/2017 07:36 AM The patient lives with mother.			
				Confidential History	Add

4 Click Confidential History.

The **Confidential History** window opens.

📰 Peds Confidential History	r - Substances
Substances	Include confidential information in the pediatric Social History document with patient/guardian permission
Psychiatric/Placement	
Sexual Practices	Alcohol Use
Child Abuse	Drinks alcohol: O No 🙃 Yes O Formerly
Child Abdac	Type: hard liquor Freq: daily Amt: 4 beers Last drink: last night
	Sought treatment for alcohol abuse: 💿 No 🔿 Yes
	Have you had withdrawal problems, seizures or blackouts from alcohol or drugs: O No 💿 Yes
	Involved in a 12-step program: 💿 No 🔿 Yes
	Emergency medical attention required due to intoxication: O No O Yes Number of times:
	Family history of alcoholism: O No O Yes
	Drug Use/Abuse Uses drugs: No Yes Formerly Age started: 10 years Type: marijuana Freq: 2X / day Route: Inhaled Quit 06/04/2017 Type: Freq: Route: Inhaled Quit 06/04/2017 Type: Freq: Route: Quit Quit Sought treatment for drug abuse: No Yes Quit Outpatient Inpatient Inpatient Involved in a 12-step program? No Yes Emergency medical attention required due to drug use: No Yes Family history of drug abuse: No Yes

- **5** Add or modify confidential history details (including all required templates).
- 6 Click Save & Close.

You are returned to the **CCM Care Plan** template.

Mental and Cognitive Assessment

Use the **Mental and Cognitive Assessment** panel to document the CCM patient's mental and cognitive condition.



Add Mental and Cognitive Assessments

- 1 Click Add.
 - The **Screening Tools** window opens.

nteractive Screening Tools 🌘				Website Screening Tools 🚯	C
ehavioral Health Assessments	Health Statu	Assessments		Web ASCVD 10 Year Risk	*
CAGE Questionnaire	Framingh	am 10 year Risk for CAD	-	Web Bipolar Spectrum Diagr	ostic Scale (BSDS)
 Drug Abuse Screening Tool (E 	DAST) 💠 Health As	sessment Questionnaire Disability	Index (HAQ-DI(c)) 🕕	Web Goldberg Depression C	uestionnaire
 Generalized Anxiety Disorder Geriatric Depression Scale (GI 	- / (GAD-/) The Saint	Louis University Mental Status (SLI ants	JMS) Examination	Web Hamilton Anxiety Scale	- (ΗΔΜ-Δ)
Major Depression Inventory (MDI-10) Edinburg	n Postnatal Depression Scale		Web Hamilton Pating Scale f	or Depression (HAM F
Patient Health Questionnaire	(PHQ-2)	engstock Elder Abuse Screening Te	est (H-S/EAST)	Web Hallinton Kating State	or Depression (nAm-L
Patient Health Questionnaire Suicidal/Homicidal Risk	(PHQ-9) Veterans	Rand 12 Item Health Survey (VR-12)	Web OKPDS Kisk Eligine	acion Carlo
Creaning instrument	Score S	warity/interpretation Commo	ntra bi	Asian Dapracciva Disandar (MDD) pro trastr	ant @
Screening instrument:		everity/interpretation: Comme	nts: W	ajor Depressive Disorder (MDD) pre-treath	ient 😈
j see scanned document	Exclusions			Add Upd	ate Clear
creening Tool			/	♦ H	ealth Promotion Plan
Date Instrument	Score	Severity/Interpretation	Completed By	Comments MDD	Classification
				Edit	Remove
				Edit	Remove
				Edit	Remove

- 2 Select the behavioral, health, or self-assessment you are documenting.
- **3** Fill out the assessment.
- 4 Click Save & Close.

The assessment is now listed in the **Screening Tool** grid.

Screening Tool					Health Promotion	Plan	
Date	Instrument	Score	Severity/Interpretation	Completed By	Comments	MDD Classification	
06/14/2017	Drug Abuse Screening Test (DAST)	3	Low level	NEXTGEN Y. Admin			
						Edit Remo	ve
					Sav	e & Close Cano	cel

CCM Care Plan Review

Use the **CCM Care Plan Review** panel to review and submit the CCM Care Plan.

Care Plan Review	Care Plan Re	eview Interval	12 Months 11 Months 21 Days	till next review
	Ca	re Plan Reviewed O Submitted	06/26/2017 Submit	
		(His	story of POC Review)	
	Date Reviewed	Due Date	Provider Name	
	06/26/2017	06/26/2018		Dalata
	06/26/2017	06/26/2018		Delete
	06/15/2017	12/15/2018	Contract of the second state	

Submit a Care Plan Review

- 1 Click the date field.
- 2 Click the **Care Plan Reviewed** check box.

Today's date populates the calendar entry.

Care Plan Review	Care Plan Review Interval 12 Months 1 Year 5 Months 26 Days till next review	
	Care Plan Reviewed 06/22/2017 Submit	

3 Click Submit.

The details of the patient's care plan review are added to the History of POC Review grid.

Care Plan Review	Care Plan Review Interval	12 Months 1 Year till next rev	view
	Care Plan Reviewed Care Plan Reviewed Submitted (Hi	06/26/2017 Update story of POC Review)	
	Date Reviewed 🛛 Due Date	Provider Name	
	06/26/2017 06/26/2018		Dalata
	06/26/2017 06/26/2018		Delete
	06/15/2017 12/15/2018		
	•		Þ

Update the CCM Plan of Care Date

- 1 Highlight the CCM plan row in the **History of POC Review** grid.
- 2 Click Update.

The updated information is saved to the patient chart.

Delete a CCM Plan of Care

- 1 Highlight the CCM plan row in the **History of POC Review** grid.
- 2 Click Delete.

The grid entry is removed.

Goals

Use the **Goals** panel to document the CCM goals and time span for the patient.

Coals reviewed/undated	
obais reviewed/updated	
change I want to make is:	How important is this change to you? on a scale from 0 (not important) to 10 (very important)
steps I will take to achieve this change are:	Things that could make it difficult to achieve this change include: How much: When:
plans for overcoming these difficulties include:	How often: Support/resources I will need to achieve this change include:
w confident are you that you will be able to reach this goal?	C Short term goal C Long term goal Timeframe for goal achievement:
- statement:	
racters left: 1000	Add Update Clear All
down to view grid)	

Add a Goal

1 Click the **Goal reviewed/updated** check box.

The **Goals** options appear.

Goals reviewed/updated	Set new goal(s)	Met goal(s)	Revised goal(s)
------------------------	-----------------	-------------	-----------------

- 2 Click the Change I want to make is field.
- **3** Type in the first priority change to be made by patient for recovery.
- 4 Click the How important is this change to you field.

The **Importance** window opens.

Importance	×
0/10	
1/10	
2/10	
3/10	
4/10	
5/10	
6/10	
7/10	
8/10	
9/10	
10/10	
	Close

- **5** Select an importance for this goal.
- 6 Complete all the fields in the **Goals** panel.
- 7 In the Support/Resources needed to achieve this goal field, click the Support/Resources hyperlink.

The Care Coordination Team list opens.



8 Select one or more resources and click **Close**.

9 Click Add.

The goal is added to the **Goals** grid.

(Page down	to view grid)							
Date	Review	Rev. Date	Goal Type	Timeframe	Goal Statement	Change	Importance	Steps
06/12/2017		11				test test test	2/10	
•								Þ
							Re	move
						Generate Ca	re Plan:	Generate

> To remove goal details from all the fields prior to adding, click **Clear All**.

Update a Goal

- **1** Highlight the row in the goals grid.
- **2** Update the goal details.
- 3 Click Update.

Delete a Goal

- 1 Highlight the row that you want to remove from the goals grid. The **Remove** button is enabled.
- 2 Click Remove.

The goals grid row is deleted.

CHAPTER 8

CCM Telephone Template

Use the **CCM Telephone** template to document telephone conversations happening outside of a formal encounter.

• /	06/12/2017 07:36 AM : "*Intake" 06/12	/2017 07:36 AM : "**CCM Telephone" 🗙 06	5/12/2017 0	:36 AM :	***CCM Provider Test Act	ion" *CCM Billing	06/12/2017 07:36 A	M : "**CCM M
Navigation	Contact type: Outgoing call Urgency: by noon Date of call: 06/21/2017 11:50 AM After Active Medications	Spoke with: Patient Name: Relationship: mother	0		t Information: Car me: () - y: Ext: her: (this call only) () - *= Prefet balans	Mgmt. Template Ca Alternate: Cell: Cell: Email: rred contact	re Plan Template Ext:]
	Medication	Sig Description		x Code	Diagnosis		Date Diagnosed	Chronic
	Topamax 100 mg tablet	1 tablet by Oral route 2 times per day		0	Essential (primary) hyper	tension	//	Y
			E	10.8	Type 1 diabetes mellitus	w/ complication	11	Y
			ŀ					Þ
	Communication: 🔽 Chronic Care Mg	Imt		Actions				
	CCM service type:			_		Details:	Co	ompleted:
					edule appointment:		L	1
	You MUST enter minutes before yo	ou can send CCM!!!! Duration:	Max Disease as	□ Ser	id reterral:		ř	
	Sort by: Summary C Phrase CCM	service Common Phrases My Phrases Manager	My Phrases		ce new medication order:		[
			<u> </u>		ust metrication:		[
					incel natient:		[1
	L		~		ner:		E	1
	Meds/Allergies/Chronic Problems	Review of Test(s)				Admin Action	Release of Info Lo	a (PHI)

Important: Remember that you must enter the number of minutes spent on the call before sending it for CCM billing.

These phone calls are then tracked in the **CCM Management** template in the **CCM Telephone Call History** panel.

Document a CCM Telephone Call

- 1 Click the **Spoke with Patient** check box if able to talk directly with the patient.
- 2 Click the **Contact type** field.

The **Contact Type** list opens.



- 3 Select a contact type. For this example, click **Outgoing call**.
- 4 Click the **Name** field.
- **5** Type the name of the person that spoke with you.

6 Click the Urgency field. The Call Urgency list opens.



- 7 Select a call urgency. For this example, click **by noon**.
- 8 Click the **Relationship** field. The **Relationship** list displays.

Relationship	
aunt	
auntie aunt	
brother	
daughter	
daughter-in-law	1
father	
father-in-law	
foster child	
foster parent	
friend	
granddaughter	
grandfather	
grandmother	
grandson	
mother	
mother-in-law	
neighbor	
nephew	
niece	
sdkjskdsf	
self	
significant othe	r
sister	
son	
son-in-law	
spouse	
step daughter	
step parent	
step son	
uncie	
	Close
_	

- **9** Select a relationship from the list. For example, **mother**.
- **10** Click the **Date of call** field.
- **11** Select a date from the calendar. For example, **Today**.
- 12 Click OK

The **Time** selector opens.

Time X
Time
Hour: Minutes: O AM C PM
Qk Cancel

13 Enter the time of the call. For example, 9:30 a.m.

14 Click **OK**.

To document an after-hours call, click the **After hours** check box Notice that, upon return to the Telephone template, the **Contact Information** populates.



15 Scroll down and click **CCM service type**.

Communication: 🔽 Chronic Care Mgmt	Actions:	Details:	Completed:
CCM service type: Coordinate with Home Health	Schedule appointment:		
You MUST enter minutes before you can send CCM!!!! Duration:	Send referral:		
Sort By : O Summary O Phrase CCM Service Common Phrases My Phrases Manage My Phrases	Place new medication order:		
	Adjust medication:		
	Send test result(s):		
-	Counsel patient:		
	Other:		
Review of Test(s)		Admin Action Release of Inf	o Log (PHI)

The service type list opens.

E CCMServiceDisp		2
txt_service_desc		
Coordinate referrals Coordinate Transportation Coordinate with Home Health Diagnosis checkup Manage services Manage specialist visits Manage transition care		
Medication checkup		

- **16** Select **Coordinate with Home Health**.
- **17** Click **OK**.
- 18 Click Duration.
- **19** Using the Number Pad, enter the call duration.

Note: Ensure that the time increments (3, 5 or more minutes) add up to at least 20 minutes before you bill under 99490 for that month.

20 Click **OK**.

The CCM service minutes documented uploads to the **Services Provided This Month** grid on the CCM Management and the CCM Service History grid on the **CCM Telephone** template.

The call displays in the This Communication History grid.

This Commun	nication Hist	Tasking:				
Date	Time	Concerns/Issues	Comments	Employee T	Priority:	
06/15/2017	9:30 AM	CCM		NEXTGEN Y. Admin	Send & Close	
•				Þ	Status: 💿 Open 🔿 Co	mplete

The CCM service minutes documented uploads to the **Services Provided This Month** grid on the CCM Management and the CCM Service History grid on the **CCM Telephone** template.

21 To send a task and close the template, click **Send & Close** to the right of the **Communication History** grid.

The Task Recipients window opens.

For more information on the on updated template and document, go to the NextGen Healthcare Success Community (https://www.community.nextgen.com/) to access the latest version of the *Telephone Call Tasking White Paper for NextGen KBM*.

The CCM service minutes documented upload to the **Services Provided This Month** grid on the CCM Management and the CCM Service History grid on the **CCM Telephone** template.



Add a Telephone Call

1 Open the NextGen KBM **Telephone Call** template.

06/12/2017	07:36 AM : "*Inta	ike" 06/12/20	17 07:36 AM : ***CCM Mar	agement" 🗍 06	/12/2017 07:36 AM	: Document "DCE_Tele	phone_Call"	06/12	/2017 07:36	AM : "Telephone C	Call" X
Contagion Risk (?) TOB (?) HTN (?) DM (?) CAD (?) (?) CAD											
fi -	Intake	Historie	s SOAP		Finalize	Checkout					
Care Gui	delines C	Global Days 🔹	Comments pointments) (Telephon	e Call Summary)	PCP:		Panel Contr	ol: 🕤 Tog	ggle 🍙 4	r Cycle 🐲	
Communi	cation:									۲	
Amedication Management Amedication Management Amedicat Question Amedicat Question Amedicat Question Amedicat Question Communications: Display: Display											
Date	Contact Time	Contact By	Reason	Concerns/Issues	Comments					En 🔺	
07/06/2017	8:00 AM	mother	Other		Communication					NE	
07/06/2017	7:57 AM	mother	Other		Communication:	Urgency:by noon.				NE	
07/06/2017	7:44 AM	mother	Other		Communication:	Urgency:by noon.				NE	
06/15/2017	9:30 AM		Other	CCM						NE	
06/13/2016	2:27 PM		Medication Management		Communication Medication requiper day comment: Testing time	est:TOPAMAX (TOPIRAM	ATE) 100 mg 1	tablet by (Oral route 2	times Su	
06/13/2016	2:27 PM		Medical Question	bite(s)	Communication Comment :					Su	

2 In the Communication panel, click Other. The CCM Telephone template opens.

06/201/ 07:50 AM : "**CCM Telephone" X						
Contact type: Urgency:	Spoke with: Patient Name: Relationship:	Contac Ho Da	tt Information: Care M me: (215)890-9809 y: Ext: (770)883-2222	Agmt. Template Care P Alternate: C () - Cell: C (412)291-61	Ext:	
Date of call: Time of call: 12/12/2017 11:43 AM After hour	v HIPAA 's		her: (this call only) () - *= Preferre	C c		
Medication	Sig Description	Dx Code	Diagnosis		Date Diagnosed	Chr
incureation .	Sig bestapation	789.09	Abdominal pain radiates to	back	//	N
		462	Acute (sudden onset) inflat throat)	mmation of the throat (sore	11	N
		296.80	Bipolar affective disorder		11	N
		296.80	Bipolar affective disorder v	vith moderate mania	11	N
		F41.1	Generalized anxiety disorde	er	11	N
1						•
Communication: 🗹 Chronic Care Mgmt		Action:	s: edule appointment:	Details:	Cor	nplete
ort By : 🖲 Summany 🔿 Phrase	Duration: My Phrases I Manage My Phra	Ser	nd referral:			
Son by no Summary C Phrase	my muses (manage my ma		iust medication:		[]	
			ad test result(s):			
			uncel nationt		[
1			unser patients		ī	
(Meds/Allergies/Chronic Problems) v Rev	iew of Test(s)		ici.			

3 Click the **Contact type** field.

The **Contact type** window displays.

Contact type:	×
Incoming call Incoming email Incoming fax Incoming voice Outgoing call	mail
	Close

- 4 Select a Contact type. For example, **Outgoing Call**.
 - > You can click **Close** if you are not selecting a contact type.
- 5 Click the **Name** field, and type the name of the contact.
- 6 Click the **Urgency** field, and make a selection from the **Call Urgency** window.
- 7 Click the **Relationship** field and make a selection from the **Relationship** window.
- 8 If you spoke with the patient, check the **Spoke with** box.
- **9** Below the Active Medications panel, check the **Communication** box to indicate this is a CCM patient.

The **CCM Service type** field populates the screen.

Active Medications			Current Pro	oblems			
Medication	Sig Descri	ption	Dx Code	Diagnosis		Date Diagnosed	Chro
			789.09	Abdominal pain radiates to	back	11	N
			462	Acute (sudden onset) infla throat)	mmation of the throat (sore	11	N
			296.80	Bipolar affective disorder		11	N
			296.80	Bipolar affective disorder	with moderate mania	11	N
			F41.1	Generalized anxiety disord	ler	11	N
			•				
CM service type:	, mt	Duration:	Sch	• edule appointment: nd referral:	Details:		iomplete
ort By:		My Phrases Manage My Ph	irases 🗌 Pla	ce new medication order:		I	-
			🔺 🗌 Adj	just medication:		I	-
			Ser	nd test result(s):		I	_
			🔽 🗌 Coi	unsel patient:			
			[Oth	her:			
Meds/Allergies/Chronic Problems	v Review of Test(s)				Admin Action R	elease of Info L	og (PHI

10 Click the CCM Service type field.

The service type list displays.

DCE CCMServiceDisp		<
Itst_service_desc Coordinate referrals Coordinate Transportation Coordinate with Home Health Diagnosis checkup Manage services Manage specialist visits Manage transition care Medication checkup		
Refresh	OK Cancel	

11 Select the service type from the list. For example, **Coordinate Referrals**.

Note: Service types are added in the *CCM Practice Setup template* (on page 9).

- **12** Click **OK**.
- **13** Click the **Duration** field.
- **14** Use the Number pad to enter the total minutes.

The CCM service minutes documented uploads to the Services Provided This Month grid on CCM Management and the CCM Service History grids on the **CCM Telephone** template. Click the grid immediately below and use the **Common Phrases** link to enter free-text notes.

- **15** To generate and forward a task and close the template, click **Send & Close**.
- **16** To close the template, click the **Save and Close**.

CHAPTER 9

CCM Provider Test Action Template

Use the CCM **Provider Test Action** template to review a CCM patient by:

- > Reviewing the Appointment Information and Contact Information panels.
- > Addressing the Orders.in the grid.

<	06/12/2017 07:36 AM : "**CCM Provide	r Test Action"	×									Þ
>>							(?) TOB	(?) HTN	(?) DM	? CAD	0	•
Nav	Specialty Internal Medicine	Visit Type	🔻 Chart Update									
igatio	ft Intake H	istories	SOAP		Finalize	Checkout						
	_											
	Care Guidelines Global Days						Panel Con	trol: 🕤 To	ggle 🍙	Cycle	3	
	Appointment Information									۲		
	First office visit: // Mo	ost recent offic	e visit: 06/13/201	6					A	opointment	s	
	Contact Information									۲		
	Home: () - Work:	(415)454-1514	Mobile:	() -	Pharmacy (prefe	rred):						
	Orders									۲		
	View of All Orders	Status	Date	Time	Date Completed	Order	Interpretatio	on	Report			
	Diagnostic Study	completed	06/14/2017	12:06 PM	06/14/2017	Clock Drawing Test (CDT)			25			
	Lab orders											
	Lab results (view only)											
	Other orders											•

CHAPTER 10

CCM Population Dashboard

The **CCM Population Dashboard** template allows you to view and manage all CCM patients enrolled in the current practice.

The **CCM Population Management** grid displays:

- > Patient Name
- > Rendering Provider
- Time Logged This Month
- > Issues

The **Issues** column lists one or more statuses that affect a patient's enrollment into CCM care.

4 06/05/2017 05:28 AM : ***CCM Manage	ment" *CCM I	Population Management 🗙]					Þ		
•CCM Sidebar 4 Chronic Care Management <u>CCM Billing</u> <u>CCM Population Dashboard</u>	Chronic Care Management Population Management Use this template to manage CCM enrolled patients in the current practice. Use the filter to show all patients or only show those that have billing issues. By default the grid shows current month. Use the "Select Month" filter to see previous months. Select a patient from the table and click the Open Chart button to go directly to the patient chart. To unenroll a patient, highlight them in the grid and click the Unenroll Patient button.									
CCM Opportunity Dashboard	Filter Grid	(Choose Filter Firs Show All	t)	Selec	Month	(Select Range 2r	nd) Organize by: O Patient O Provider			
CCM Practice Setup	Date enrolled	Patient Name	Rendering P	rovider	Time Logge	ed This Month	Bill Issues			
	06/01/2017	100100-000		0.0000			Less than 2 chronic conditions specified to bill. Less than 20 service minutes recorded this month.			
	06/02/2017	Number - Walt	1000	100000			Less than 2 chronic conditions specified to bill. Less than 20 service minutes recorded this month.			
	05/24/2017	1000 - 1000 L	ALCONG ! BE	A REPORT OF			Less than 20 service minutes recorded this month.			
	06/01/2017	1980 - 1990 B.	1019015	100000	30		Less than 2 chronic conditions specified to bill.			
	06/02/2017	Hart - Honoreau	1010010-00	1049630	125		Already billed for this month.			
	06/05/2017	1000 - 10000	1210218-	The second second	20		Ready to bill.			
	٩.							•		

The billing issues/statuses that impact patient enrollment are among the following:

- > Ready to Bill
- Patient suspended from billing
- > No CCM payer assigned
- > Already billed this month
- Less than 2 chronic conditions specified to bill
- Less than 20 service minutes recorded this month

Organize and Filter the CCM Opportunity Dashboard Contents

Use the CCM Opportunity Dashboard template to identify patients that meet chronic care management criteria, but are not yet enrolled in CCM.

Important: Since the CCM Opportunity Dashboard grid does not refresh upon opening the template, we recommend that you perform an update whenever you want to view the most current data.

To refresh the data and repopulate the grid click **Update**.

CCM Opportunity Dashboard Functionality

Use the CCM Opportunity Dashboard to:

- > Open a patient chart to view, enroll, edits or otherwise manage the patient encounter displayed in the grid
- > Change a patient's CCM status to eligible
- > Generate a Crystal report containing CCM Opportunity data

CHAPTER 11

Additional Configuration and Setup

This section provides information about the following setups:

- > Adding the CCM Status fields to the Patient Information Bar
- > Configuring of the CPT® codes and Service Item Library (SIM) for charges and billing
- > Adding CCM Manage and CCM Plan links for easier navigation

Add the CCM Status to the Patient Information Bar

- 1 In File Maintenance, go to Practice Preferences.
- 2 Navigate to the **Patient Information Bar** menu item.
- 3 In the Table Fields sections, search for DCE_CCM_Demographic_Fields.

Address: 123 Any Street Contact: (215) 677-777 (H) MRN: 32 Insurance: BCBS Of California Nickname: Lab CCM Status: Enrolled Care Plan Reviewe 05/05/2015 Care Plan Due Date: 05/05/2017 PCP: Luckane, Craig Pderming CODVM Detail: 00000 Detail: 00000D	ce Adaleer (F) DOE	3: 10/03/1972 (43 years)	Allergies 🦞	Problems Diagnoses Medications
Template Customization Template Popup Template 1 Image: Comparison of the complant of the comparison of the compari	Address: 123 Any Stre Horsham, PA Contact: (215) 677-77 (HAlerts) OBGVN Details	eet MRN: 32 19044 Insurance: BCBS Of California 777 (H) Nickname: Lab	CCM Status: Enrolled Care Plan Reviewe 05/05/2016 Care Plan Due Date: 05/05/2017	PCP: Lucklane, Craig Referring: Rendering: Anderson, Barry FP MD
	Template C Popup Temp Popup Temp Table Field Table Field Table Field Alerts V Display	Plate 1 Plate 1 plate 1 Plate 1 plate 2 Plate 1 plate 2 Plate 1 plate 3 Plate 1 DCE_CCM_Demographic_F DCE_CCM_DEMOGraphic_F DCE_CC	Select Demographics Table Orde Patie chm_orders_monitor_ chm_urine_dipstick_ chm_wound_care_monitor_ chsigns_monitor_ chm_wound_care_monitor_ CMSICDCoverage_ ContrastAllergy_ Coordinator_ DCC_TCEDorder_ DCE_History_probsgoals_ DCE_History_probsgoals_ DCE_TTD_Service_Log_ display_text_only DoctorTeam_ duration_dm_ edit_patient_provider_role_ eds_inb_referral_master_ DCL OK	
4 Input the required details in the **Field** and **Display Label** fields.

Table	Field		Display Label	
Table Field 1 彦 DCE_CCM_Demographic_F	txt_enrollment_status	-	CCM Status	Clear
Table Field 2 📂 DCE_CCM_Demographic_F	txt_date_reviewed_care	•	Care Plan Reviewed	Clear
Table Field 3 📂 DCE_CCM_Demographic_F	txt_date_reviewed_care_due	•	Care Plan Due Date	Clear

Note: You can also add a Care Plan Reviewed Date and a Care Plan Due Date.

Configure CPT4 and SIM Codes for Charges and Billing

1 Click CPT4 Codes.

The Modify CPT4 Code Information window displays.

Countors	CPT4 Code Search	
CPT4 Codes	Search Method © Code © Description	152 190
Diagnosis Categories	Search for keyphrase anywhere in the item.	
DME Regions	Type the first letter(s) of the item you want to locate 99490	
Employers	99490 Chronic Care Manageme	ent
💓 Enterprises		Modify CPT4 Code Information
👫 External System Setup		Code Description 152
Form Templates		99490 Chronic Care Management
Formats		Type of Service Reimbursement Code Other Medical
🝺 ICDCM Codes		Note
Label Products		
	V Include Hidden Items OK	Car 1 Profile Indicator UPIN Indicator 🏠 Hide 📃
	с <u> </u>	₩ho\When OK Cancel

2 Add the following codes, one by one, to the **Service Item Maintenance (SIM) Library** window.

CPT Code	Use for
99490	Chronic Care Management (up to 20 minutes)
99487	ComplexCCM
99489	ComplexCCM Add-On (each additional 30 minutes)
G0506	Add-On to CCM Initiating Visit

Jearch	Service Item Library	
	Sim Library Name	152
	Defection Consistent Library	193
SI Desc	Derauit Service item Library	
	Service Item # Description	
	99490 Chronic Care Management	Hide SIM
	CPT4 Code	
	99490 21 Chronic Care Management	
	General Other Payer Labels Notes/Signific	ant Events Drugs
	Place Of Service Component Eff Date Ex	p Date Non-Facility Price Facility
		73172099 50.00
	Department Revenue Code	
	Modality Form	
	▼ 1500 ▼ 4 ₩	
	After Care Dave Race Linit Estes to page	
	D Force patient	responsibility
	AND I CHI AND I CHO Suppress Pat	ient Procedure 🔲 Suppress Billing
	Alt Procedure Code 1 Alt Procedure Code 2 Self pay Qual	ifying Encounter 🔲 Sliding fee exem
	Sliding Fee Q	ualifying Encounter
	Exempt patient adjustment code Qualifying En	counter for all payers
	 Encounter bil 	ing exempt 📃 Anesthesia QC
	Suppress from	n Statement
	Rental Behavioral Health Prevent charged	ge amount overrides
	Rental Duration per Unit Behavioral Health Base Minutes	Send \$0
		charge on claim
		Hide Library
1		

The example below shows the addition of CPT4 Code 99490.

3 Repeat the procedure for each of the CPT4 SIM Codes.

Navigation Setup

This section provides information to set up navigation links for the **CCM Manage** and **CCM Plan** templates.

Using the **Framework Content System** or **Practice** template, you can add the **CCM Manage** and CCM Plan template links to the Intake, SOAP, Telephone Call, and the other workflow templates. It is recommended to add the templates to the main tab, sub-navigation tab, or the left side Navigation bar.

Reference: For more information on editing the Framework content, see the *QRG KBM* 8.3.8 *System Template NGKBM Framework Content Quick Reference Guide*.

Add to Main Tabs

You can add the **CCM Manage** and **CCM Plan** links to the main tab on selected templates, such as Intake or Telephone Call, as displayed in the image below:

4 /	Proce	dures Superbill	09/29/2015 06:29 PM : "*)	intake" 🗙							
>>					💽 HC	с	⊘ тов	? HTN	? DM	? CAD	٥
Na	5	Specialty v Internal	Medicine Visit Type	Medicare Preventive			c				
vigatio	ñ	Intake	Histories	SOAP	Finalize	Checkout	ССМ	Manage		CCM Plan	
n	Standing Orders Adult Immunizations Peds Immunizations		My Plan P	rocedures Order N	lanagemer	nt Docu	ment Librar	у]	_		

Add to Sub-Navigation Tab

You can also add the **CCM Manage** and **CCM Plan** links to the sub-navigation tab as displayed in the following image:

			G HC	C	⊘ тов	(?) HTN	? DM	? CAD
Specialty Internal Me	dicine Visit Type	Medicare Preventive						
fi Intake	Histories	SOAP	Finalize	Checkout	CCM N	Manage		CCM Plan
Order Management	My Plan Ad	ult Immunizations Ped	s Immunization CC	M Manage CC	M Plan			

Add to Left Navigation Bar

You can also add the **CCM Manage** and **CCM Plan** links to the left side navigation bar as displayed below:



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