

Factor 4: Establishing and documenting agreements with specialists in the medical record if co-management is needed.

For patients who are regularly treated by a specialist, it would be appropriate to document this co-management situation within the patient's Care Plan in PCC EHR, making sure to include any documented agreements and visit reports.

In the following example, patient Tyler Ott has ADHD and regularly sees Dr. Abigail Adams, a behavior specialist, to manage his ADHD. This co-management arrangement is documented in PCC EHR within Tyler's Care Plan accessible from within the medical summary:

The screenshot displays the PCC EHR interface for a patient named Tyler Ott. The top navigation bar includes the PCC EHR logo, a search field with a 'FIND' button, and the patient's name and demographics: 'Tyler Ott 10 yrs, 9 mos 6/20/03 M'. The left sidebar contains a menu of navigation options, with 'Care Plan' highlighted. The main content area is titled 'Medical Summary' and shows the 'Care Plan' section for a visit on 04/08/14, which is marked as 'Active'. The Care Plan includes the following sections:

- Goals:** Manage ADHD
- Actions:** Behavior management
- Next Steps:** discuss progress with behavior management at next well visit.
- Care Coordination Notes (internal use):** Tyler regularly sees behavioral specialist Dr. Adams for his ADHD
- Team Members:** Dr. Abigail Adams, M.D. (Organization: Healthy Horizons, Address: 20 Winooski Falls Way, Suite 7, Winooski, VT 05404)

At the bottom of the Care Plan, there is a 'Documents' section showing a document titled 'Correspondence (1 Page)' dated 04/08/14. A note indicates: 'Co-management agreement between Dr. Jones and behavioral specialist Dr. Adams'.

Agreements, visit notes, and other documents related to the co-management of Tyler would be scanned into the patient chart and attached to the Care Plan. Scrolling further down, you will see any documents that have been linked to Tyler's Care Plan:

SEARCH BOX FIND

Tyler Ott PCC# 818

Medical Summary

Recent and Upcoming Appts

Patient Demographics

Siblings

Reminders

Problem List

Allergies

PCC eRx Allergies

Medication History

Family Medical History

Medical History

Social History

Care Plan

Confidential Notes

Demographics

History

Visit: 04/11/14

Team Members

Dr. Abigail Adams, M.D.

Organization: Healthy Horizons
Address: 20 Winooski Falls Way
Suite 7
Winooski, VT 05404

Note:

Documents



Correspondence (1 Page)

Date: 04/08/14

Note: Co-management agreement between Dr. Jones and behavioral specialist Dr. Adams. [pcc]

Attached to: 04/08/14 - Care Plan Goal "Manage ADHD"

EDIT TAGS

VIEW DOCUMENT



Visit Note (1 Page)

Date: 04/08/14

Note: Visit note from Tyler's 3/8/14 visit with Dr. Adams. [pcc]

Attached to: 04/08/14 - Care Plan Goal "Manage ADHD"

EDIT TAGS

VIEW DOCUMENT

Created by PCC PCC 04/08/14 11:53am