

## Factor 9: Documents co-management arrangements in the patient's medical record.

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, 10 years and 9 months old, born on 6/20/03. The main section is the Medical Summary, which is currently expanded to show the Care Plan for 04/08/14, which is active. The Care Plan section includes:

- 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)

Below the Care Plan, there is a section for Documents, showing a document titled "Correspondence (1 Page)" dated 04/08/14. The note for this document is: "Co-management agreement between Dr. Jones and behavioral specialist Dr. Adams".

The left sidebar contains navigation options for Tyler Ott (PCC# 818), including 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 (highlighted), and Confidential Notes. At the bottom of the sidebar, there are sections for Demographics, History, and a visit scheduled for 04/11/14 (9-10 Yr Well - Demo II).

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:

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