***Practice Name:***

**Address:**

Policy dated: 4/3/17

**Assigning Care Duties TC-02**

At the offices of Practice Name:, we have created a care team with the following assignments:

***Front Desk/Medical Assistant***

* Review QARR reports, as well as running Quality Measure reports from our EMR (EMR Name:), in order to do the following:
  + Send letters and call directly, patients who are overdue for important preventative screenings KM-12
  + Send letters and call directly, patients who are overdue for follow-up appointments for important chronic conditions KM-12
  + Send letters and call directly, patients who are overdue for an office visit KM-12
  + Send letters and call directly, patients who are overdue for important immunizations KM-12
* Help patients make appointments with providers for any outside referrals CC-04
* Help patients with any insurance pre-certifications, as needed
* Distribute the Medical Home Brochure, Explain the scope of services (including how behavioral health needs are individually addressed), and answer any patient questions regarding the practice’s role as a medical home TC-09
* Check EMR for any secure electronic messages, faxes, or open/pending telephone encounters received, and then document in EMR. AC-04, AC-07, AC-08
* Run Quality Measure reports from our EMR (EMR Name:) in order to send letters and call directly, patients who are overdue for follow-up for medication use we feel require close monitoring KM-12
* Follow-up on outside referrals – The log and/or EMR is to be checked 3x per week. Bring all referrals follow-up information to the clinician, highlighting the overdue ones. CC-04
* Ensuring appropriate inventory for vaccines
* Makes follow-up calls regarding lab and imaging results CC-01
* Ensures all labs are picked up by the specimen carriers by close of business.
* Run report from our EMR (EMR Name:) regarding overdue lab results CC-01
* Run report from our EMR (EMR Name:) regarding overdue imaging results CC-01
* Scan Diagnostic Imaging and Specialists Reports, and any relevant patient documentation into EMR.
* Bring Lab and Diagnostic Imaging results to the attention of the clinician. CC-01
* Ensure appropriate inventory of office products and testing supplies.
* Run Report for our EMR (EMR Name:) regarding no show rates.
* Record patient history and personal information
* Measure vital signs, such as blood pressure
* Help the physician with patient examinations
* Give patients injections or medications as directed by the physician and as permitted by state law
* Schedule patient appointments
* Prepare blood samples for laboratory tests
* Enter patient information into medical records
* Distribute patient surveys and review feedback from suggestion box QI-04

***Clinician***

* Review all lab and imaging results CC-01
* Delegates follow-up calls regarding lab and imaging results to Medical Assistant CC-01
* Review QARR reports with team QI-15
* Review Quality Measure reports with team QI-15
* Review reports from outside referrals CC-04
* Examine patients
* Take medical histories
* Prescribe medications
* Order, perform, and interpret diagnostic tests
* Counsel patients on diet, hygiene, and preventive healthcare.
* Perform general check up on all members of a family
* Make referrals to specialists when necessary CC-04
* Provide vaccinations and counsel family members on preventative care
* Able to diagnose a wide range of physical and physiological problems
* Promote healthy lifestyles such as diet and fitness to improve the general health of family system
* Provide emotional support to patients in times of medical emergencies
* Make home visits and be on call
* Update charts and patient information to show current findings and treatments
* Review test results to identify any abnormal findings CC-01
* Recommend and design a plan of treatment
* Address concerns or answer questions that patients have about their health and well-being

***Office Manager***

* Responsible for non-clinical aspects of the day to day operations in the medical office
* Run report from our EMR (EMR Name:) regarding overdue lab results CC-01
* Run report from our EMR (EMR Name:) regarding overdue imaging results CC-01
* Scan Diagnostic Imaging and Specialists Reports, and any relevant patient documentation into EMR. CC-04
* Bring Lab and Diagnostic Imaging results to the attention of the clinician. CC-01
* Run Report for our EMR (EMR Name:) regarding no show rates.
* Hire, terminate, and train staff in a medical office.
* Supervise secretaries, receptionists, and medical billers and coders.
* Oversee billing, coding, and collections.
* Schedule appointments.
* Maintain medical records.
* Make deposits.
* Reconcile account information.
* Pay medical office bills.
* Arrange cleaning staff.
* Arrange for emergency maintenance visits for building.
* Order medical and office supplies.
* Submit claims to insurance.
* Process company's response to claims.
* Submit billing statements to patients.
* Delegate responsibilities.
* Assess employee performance.
* Perform data entry and processing.
* Develop and implement office policies and procedures.
* Formulate objectives and processes.
* Generate inventory records.
* Provide educational material for patients. KM-16, KM-22