



PROJECT ACCESS

REFERRING CLINIC MANUAL

making health happen

PrimaryCareCoalition.org

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PROJECT ACCESS PROVIDER MANUAL

Project Access aims to provide timely, high-quality, specialty care for low-income, uninsured patients. You can help by ensuring that patients are prepared to actively engage in their specialty care, and that referrals are complete and contain all the information required for Project Access to schedule an appointment. This manual will help you and your patients through the Project Access referral process.

Project Access is a specialty care referral network administered by the Primary Care Coalition (PCC). It is composed of a dedicated group of health care specialists, local hospitals, and diagnostic facilities that participate in a coordinated effort to provide specialty care to low-income and uninsured members of our community. Project Access helps these individuals gain timely access to specialty care, potentially avoiding acute hospitalizations and expensive medical bills.

Patients referred to Project Access must be eligible for programs coordinated by the Primary Care Coalition (e.g. Montgomery Cares and Nexus Montgomery). Montgomery Cares patients are automatically eligible for specialty care through Project Access. Patients receive health care through these programs because they are uninsured and ineligible for federal safety-net programs such as Medicaid.

Clinics participating in Montgomery Cares provide primary care to these patients. Once the primary care provider (PCP) determines the patient's need for specialty care, the clinics refer the patient to Project Access, which coordinates an appointment with a specialist in our network.

Specialists who have agreed to provide services to Project Access patients are contacted by Project Access to determine availability for appointments. Project Access schedules the initial appointment when an appropriate specialist is identified.

Project Access Clinic Referral Process

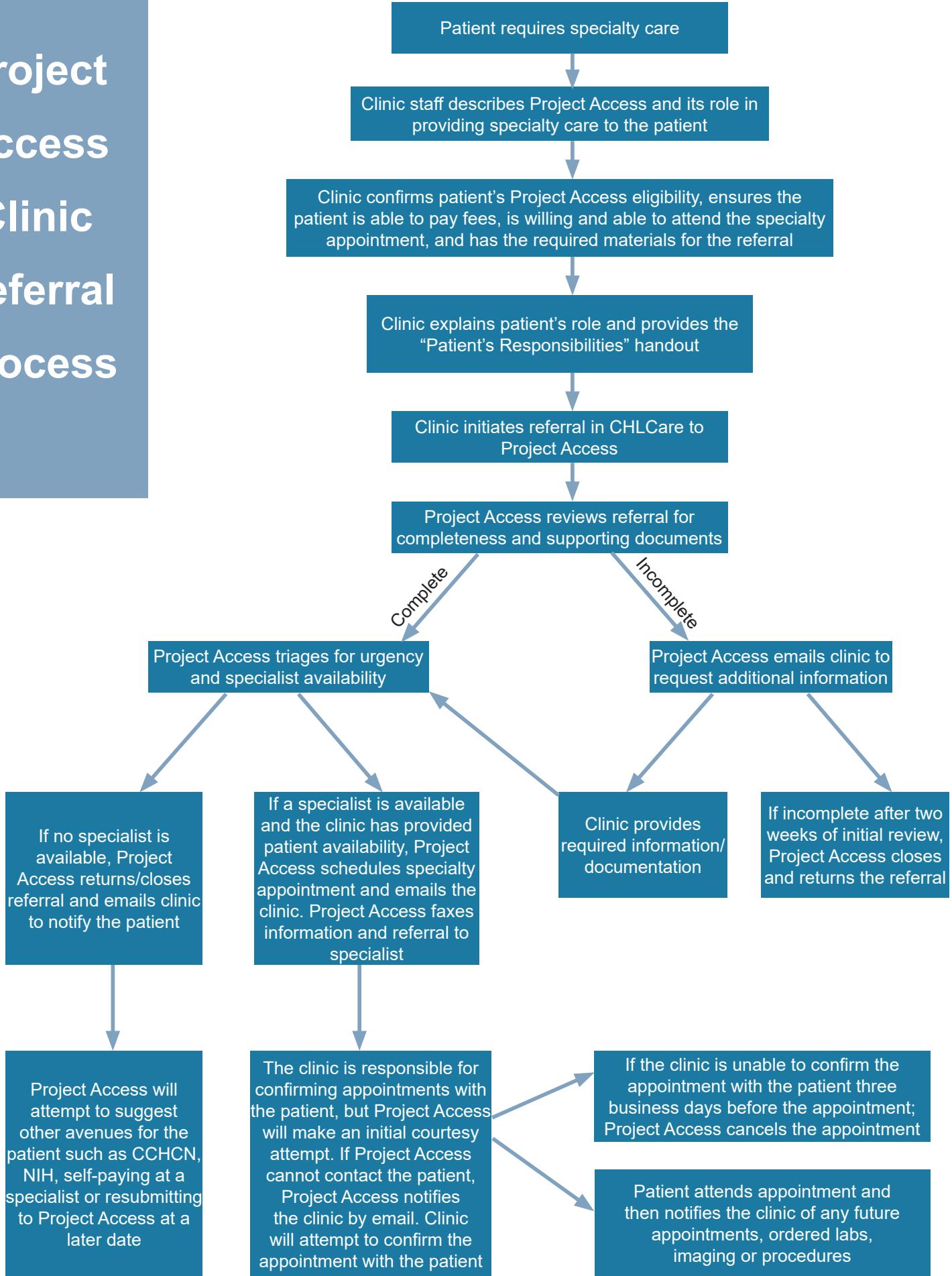


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PATIENT ELIGIBILITY CHECKLIST

Use this checklist when referring uninsured patients for specialty care through Project Access. If the information requested below is not provided, care may be delayed or the referral may be returned.

PATIENT ELIGIBILITY

To be eligible for this service the patient must:

- Be 18 years or older
- Be uninsured
(Not eligible for Medicare, Medicaid, or private insurance)
- Have no plans to leave the area in the next 90 days
- Have a low household income
(≤ 250% of the Federal Poverty Level)
- Enrolled in program for at least the next 90 days
(Montgomery Cares, Nexus Montgomery)

If the patient is eligible for Medicaid or Medicare, he/she should be referred to the Office of Eligibility and Support Services (OESS) to apply for coverage.

Montgomery Cares patients are automatically eligible for specialty care through Project Access. If the patient's Montgomery Cares enrollment ends within the next 90 days, the clinic and patient should renew it before the referral is initiated.

PATIENT ENGAGEMENT

Before initiating the referral process, please confirm the patient:

- Understands his or her diagnosis and the need for specialty care
- Is willing to receive specialty care
- Received the "Patient's Responsibilities" handout and understands his/her responsibility in receiving specialty care
- Speaks English, or is able to arrange an adult interpreter at the appointment
- Understands that he or she will need to arrange transportation to the appointment
- Is willing and able to pay applicable co-pays as indicated on the referral
- Has completed all the lab work or imaging that was ordered by the primary care provider
- Has all applicable supporting documents (e.g. Photo ID, MRI/CT discs, X-ray)

A patient who does not have eligibility documentation or is pending OESS determination may not be referred to specialty care until MCares eligibility has been documented and confirmed.

CHECKLIST

If the patient meets the eligibility requirements, please obtain the information below and ensure it is entered and accurate in CHLCare. **If the information is not provided, care may be delayed or Project Access may return the referral.**

- Name
- Gender
- Date of birth
- Address

If address is unavailable is the patient homeless?

- Phone Number(s)
- Household Income
- Is the patient's household income less than or equal to 250% of the federal poverty level?
- Household Size
- Does the patient have program eligibility for at least the next 90 days?
- Preferred Language
- Enter clinic encounter information and PCP information (see page 8, Step 1)
- Specialty Needed
- Diagnosis
- Briefly describe the current medical issue and purpose of the referral
- What days of the week and time of day is the patient available?

Availability should be typed into the Notes/Comments section of the referral in CHLCare. If the patient's availability is limited, this may delay care.

- Upload all relevant labs, imaging, and hospital consults with the patient's referral

The image shows two versions of a "PROJECT ACCESS Patient's Responsibilities" handout. Both versions feature a blue circular logo with three dots and the text "primary care coalition".

English Version:

- Project Access or clinic staff will call you to arrange a specialty care appointment.**
- If you cannot be contacted, or if you do not return phone calls, your appointment will be cancelled.**
- Patients who miss 2 scheduled appointments will no longer be eligible for Project Access.**
- Before Your Appointment:**
 - Accept and return calls from Project Access
 - Call the specialist if you need to cancel your appointment
 - Arrange your own transportation to appointments
 - If you do not speak English, bring an adult interpreter to appointments
- On Your Appointment Day:**
 - Arrive at the office 15-30 minutes before your appointment
 - Bring the referral (sent to you in the mail)
 - Pay the co-pay amount listed on the referral
 - Authorize release of medical information to your primary care provider
- After Your Appointment:**
 - Call Project Access if your specialist requests labs, radiology, a surgical procedure, or any other tests
 - Call Project Access each time you schedule a follow-up appointment with your specialist
- Notify Project Access if you get health insurance, Medicare, or Medicaid.**

Spanish Version:

- Project Access o personal de la clínica le llamarán para programar una cita de atención especializada.**
- Si no puede ser contactado, o si no devuelve las llamadas telefónicas, su cita será cancelada.**
- Pacientes que fallen a 2 citas programadas ya no serán elegibles para Project Access.**
- Antes De Su Cita:**
 - Aceptar y devolver llamadas de Project Access
 - Llamar a la especialista si se necesita cancelar su cita
 - Coordinar su propio medio de transporte para acudir a las citas
 - Si no habla inglés, lleve a un intérprete adulto a las citas
- El Día De Su Cita:**
 - Llegar 15-30 minutos antes de la hora programada de su cita
 - Llevar la referencia (enviada a usted por correo)
 - Pay el copago indicado en la referencia
 - Autorizar la divulgación de información médica a su proveedor de atención primaria
- Después De Su Cita:**
 - Llamar a Project Access si su especialista le ordena exámenes de laboratorio, radiología, procedimiento quirúrgico o cualquier otro examen
 - Llamar a Project Access cuando programe una cita de seguimiento con su especialista
- Notifique a Project Access si obtiene seguro médico, Medicare o Medicaid.**

Both versions end with the text "Project Access | 301.628.3430".

If the primary care provider ordered labs or imaging, these should be completed and uploaded into CHLCare prior to submitting the referral. The referral should **NOT** be submitted until all tests are completed and results are uploaded into CHLCare.

DEMOGRAPHICS AND ELIGIBILITY

CURRENT AND COMPLETE DEMOGRAPHICS ARE ESSENTIAL

It is essential that the Referral Coordinator ensure that **all patient demographics are correct and current in CHLCare**. This information is used by Project Access and is often requested by the specialist with whom we are scheduling the appointment.

Confirm with the patient and ensure that the following fields are correct and current in the CHLCare Demographics referral :

- Name
- Current Address and County
- Current Preferred Phone Number
- Family Size
- Household Income
- Preferred Language
- English Proficiency
- Educational Level (some specialists utilize this to determine ability to complete forms in their office vs. mailed in advance)

Clinics using the PCC shared instance of eCW must make the changes in eCW or changes will be lost. This information is transferred electronically from eCW to CHLCare every night.

For clinics on the shared instance of eCW:

1. Enter County of residence in eCW
2. For Montgomery County residents, select “**MCares**” as the *primary insurance* in eCW.
3. For Prince George’s County residents, select “**MCares Project Access**” as the *primary insurance* in eCW.

Enter start and end dates. The start date is the date of referral and the end date is 365 days from date of referral.

For clinics on other EMRs:

1. Enter County of residence in CHLCare
2. For Montgomery County residents, select “**Montgomery Cares/NM**” under Participation in CHLCare.
3. For Prince George’s County residents, select “**Nexus Montgomery**” under Participation in CHLCare.

Select “Patient Data” → “Demographics” → “Participation” → “Add New Program” → “Program/Participation” → “Montgomery Cares/NM” OR “Nexus Montgomery”

ELIGIBLE PRINCE GEORGE'S COUNTY ZIP CODES IN NEXUS MONTGOMERY

Project Access: Specialty Care for the Uninsured

Nexus Montgomery provides access to specialty care through Project Access. In addition to serving Montgomery County patients, Project Access serves Prince George's County residents in select ZIP codes.

Use this reference guide to determine whether or not a Prince George's County patient is eligible for access to specialty care through Nexus Montgomery.

To be eligible for specialty care the patient must:

- Be 18 years or older
- Be uninsured (*Not eligible for Medicare, Medicaid, or private insurance*)
- Have no plans to leave the area in the next 90 days
- Have a low household income ($\leq 250\%$ of the *Federal Poverty Level*)
- Live in an eligible Prince George's County ZIP code (see below)

ELIGIBLE PRINCE GEORGE'S COUNTY ZIP CODES

ZIP Codes	Towns
20705	Beltsville
20706	Lanham
20707	
20708	Laurel
20737	Riverdale
20740	College Park
20770	Greenbelt
20774	Upper Marlboro
20782	
20783	
20784	
20785	Hyattsville

If the patient needs a clinically urgent appointment within 72 hours (**Urgent Referral**), please contact Project Access:

Phone: 301-628-3426 | Fax: 301-608-9047 | SpecialtyNurse@primarycarecoalition.org

Enter routine referrals in CHLCare

Project Access is administered by the Primary Care Coalition and funded by the Montgomery County Department of Health and Human Services and Nexus Montgomery. Nexus Montgomery is a collaborative effort among the six hospitals operating in Montgomery County and a variety of community-based organizations including the PCC and Project Access.

TIPS FOR MAKING A REFERRAL

COMMUNICATING WITH PROJECT ACCESS

Enter **non-urgent** referrals completely into CHLCare. No email or phone call to Project Access is necessary. If a case needs to be discussed with Project Access prior to entering the referral in CHLCare, please email Project Access with questions or concerns.

An **urgent** referral is one for which a patient needs to be seen within 72 hours. Please enter urgent referrals into CHLCare and then send an email notifying Project Access of the entry: SpecialtyNurse@primarycarecoalition.org.

As the referral moves through the process for approval and scheduling, all communication among Project Access, CCHCN, and the clinic must be documented in the Notes/Comments section in CHLCare. Include the initial of the person entering the information.

The screenshot shows a software interface for managing patient referrals. On the left, there's a sidebar with dropdown menus for 'Returned', 'Make Batch Appointment', and 'Select a Practice'. Below these are buttons for 'Update' and 'UnTag'. The main area contains fields for 'Date of Encounter', 'Treating Provider', 'Encounter Location', 'Reason', 'Diagnoses', and 'Requestor'. A 'Notes/Comments' section follows, containing a 'Call Made?' radio button group (Yes/No), a note about clicking X to cross out a recent note, and two entries: '11/20/2012 Progress note, lab report and US abdomen received. KF' and '11/21/2012 Progress note and lab report >6 mos. old. Requesting more recent progress note and labwork. IG'. A red arrow points from the left edge of the screen towards this notes section.

SPECIALTY CARE

Clinics may not directly refer to or authorize services on behalf of Project Access. Project Access will not cover the cost of any services not initiated/authorized by Project Access staff. The patient will be responsible for all costs of care initiated by the clinic outside the Project Access referral process.

The life of a specialty referral is three visits or six months, whichever occurs first. Beyond this time frame a new referral with new documentation must be provided. Include the consultant's notes to support additional visits.

Specialty care services are provided pro bono or at discounted rates. In exchange, Project Access needs to provide all the appropriate information to support specialty care. Please upload appropriate and current supporting documentation into CHLCare (recent labs, diagnostics, primary care provider notes and recent hospital notes, etc.) or the referral will be returned and the patient's care will be delayed. Please consult the Specialty Care Referral Guidelines to determine required primary care evaluation, management, and diagnostics before referring for specialty care.

There are three general options for specialty services. **Please refer to only one of these for a particular episode of care (Project Access; Catholic Charities Health Care Network (CCHCN); privately arranged through clinic).** Referring to multiple networks creates re-work and confusion for all parties. Refer to the most current "Specialty Care Resource" to assist in selecting the most appropriate network.

PATIENT OUT-OF-POCKET EXPENSES

Most specialists accept a sliding scale based on the Federal Poverty Level (FPL). These co-pays are printed on the referral form provided to the patient. Some specialists charge additional fees for visits and procedures. Project Access handwrites the “special fees” on the referral form that is mailed to the patient. Contact Project Access for any questions about patient financial responsibilities.

Please note, Project Access does not schedule or fund primary care provider ordered imaging. CCHCN may provide this service, but Project Access does not.

CHLCare AND eCW

Please be aware that patient demographic information entered into the PCC instance of eCW is “pushed” into CHLCare each night to avoid needing to enter that information for an established patient. But information entered into CHLCare does NOT get pushed to eCW. **To make updates on patient demographics, always make them in eCW, not in CHLCare**, or the changes will not convey to the eCW medical record. Non-eCW clinics should update all demographic and eligibility information in CHLCare.

SCHEDULE AN APPOINTMENT

Project Access will schedule the specialty appointments and provide the clinic with logistical information (date/time/location/prep). The clinic is responsible for confirming the appointment with the patient. Project Access will make an initial courtesy attempt. If Project Access cannot contact the patient, Project Access will notify the clinic by email or phone.

When the clinic confirms an appointment with the patient, the clinic indicates in CHLCare that the appointment was confirmed. **If the clinic is unable to confirm and document the confirmation in CHLCare three business days before the appointment, it will be canceled.**

When confirming appointments, please consult the checklist and demographics (pages 2 and 3) to ensure the patient’s information is up to date and accurate. If the information is inaccurate, care will be delayed. Please provide the patient with the Patient’s Responsibilities handout (page 2) so the patient knows what is expected of them.

FOLLOW-UP AND PROCEDURES

The specialist will generally send any future orders to Project Access with a copy to the referring provider. If the clinic receives lab or imaging orders, email or phone Project Access and upload the documents to CHLCare. If there is a specialty follow up appointment, the clinic should enter a referral in CHLCare including follow-up appointment date and time. Upload the specialist's notes indicating the need for specialty follow-up.

The specialist will generally send the specialty consult note to the clinic/referring provider, but not to Project Access. For additional specialty care requests, upload the consultant's note to the referral request in CHLCare.

- For non-surgical follow-up, Project Access will coordinate and schedule the specialist's requested diagnostics.
- For planned surgery: Patient must bring pre-operative ("pre-op") documents to the clinic. The clinic must add the patient Hospitalization Referral into CHLCare and notify Project Access of patient procedure and pre-op appointment dates. If Project Access receives pre-op orders before the clinic does, Project Access will add the patient's Hospitalization Referral, upload pre-op documents, and notify the clinic of the document upload and patient's surgical date.
- The clinic will arrange and schedule all pre-op services. **Project Access does not schedule or fund pre-op testing or clearances.** Please contact Project Access with any questions or concerns.

After scheduling pre-op appointments, the clinic should upload into CHLCare all pre-op documentation, including pre-op orders and results, once they are available. Notify Project Access by email when all documentation is uploaded. Project Access will then send all pre-ops to the operating room, specialist, hospital finance department, and anesthesia.

PATIENT RESPONSIBILITIES

It is essential the patient knows the importance of getting pre-ops done in a timely manner. If patients do not complete pre-ops or complete them at the last minute, their surgery may be cancelled. This delays the patient's surgery and affects the relationship among Project Access, the hospitals and the specialists. Please attempt to obtain all pre-ops two weeks in advance of scheduled procedures. Ensure patients know their role if they are scheduled for any surgery or procedure.

Patients must call Project Access at 301-628-3403 to provide the date and time of any scheduled follow-up appointment and/or procedure to ensure that they are approved. Clinic should emphasize patient responsibilities in this regard, and provide the Project Access patient responsibilities document with every referral (page 2).

When you schedule patients for surgery in CHLCare choose the specialty "**Hospitalization**." Only Project Access should select "**Appointment Confirmed**." This allows Project Access to track when documentation/pre-ops are in the right place and helps prevent surgery cancellations.

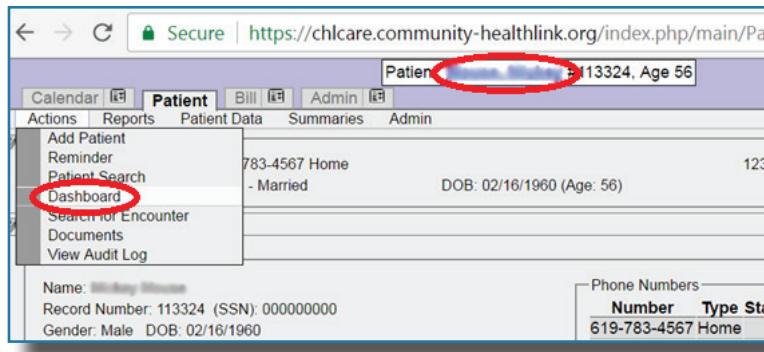
CHLCare PROCEDURE

ENTER A SPECIALTY CARE REFERRAL REQUEST

The patient's primary care encounter information is linked to the referral sent to the specialist. The referral will have the patient's PCP information so the specialist can fax their notes or contact the PCP to discuss the case.

This step only needs to be performed when adding a patient for the first time in CHLCare, or if a patient changed clinics since his or her last referral.

STEP 1: To add an encounter, go to the patient's dashboard. This can be done by selecting the patient's name in blue at the top of the screen or by going to the "Actions" menu and selecting "Dashboard."



Scroll down to the "Encounters" section and select "Add Encounter" at the bottom of the screen.

A screenshot of the CHLCare Patient Dashboard, specifically the 'Encounters' section. The page title is 'Patient: [redacted] #113324, Age 56'. The 'Encounters' section is located at the bottom left of the dashboard. At the very bottom of this section, there is a red circle around the link 'Add Encounter'. To the right of the encounters list, there is a sidebar with sections for 'Patient Statistics' (Ethnicity 0, Race 0, Income 0, Language 0, Migrant Status 0, Registration Location CCHCN, Sign In Date 00/00/0000, Monthly Income 0, Family Size 0) and 'Guarantees' (No Guarantees).

Fill in the clinic encounter information using the drop down menus: Facility, Treating Provider, Date of Treatment, Encounter Reason, and Appointment. Select “Update Encounter.”

The screenshot shows the 'Patient' tab selected in the top navigation bar. The patient information at the top right is: Patient: [REDACTED] #113324, Age 56. Below this, the 'Demographic' section shows address and contact information. The 'Criticals' section is expanded, showing tabs for 'Encounter', 'Physical Exams', 'Subjective', 'Objective', 'Assessment', and 'Plan'. A large red circle highlights the 'Encounter' tab's 'Details' panel. This panel contains fields for 'Facility' (PCC Special Programs), 'Treating Provider' (No Provider), 'Date of Treatment' (01/26/2017), 'Encounter Reason' (dropdown menu), 'App. Title' (dropdown menu), and 'Appointment' (dropdown menu). Buttons for 'Update Encounter', 'Close', and 'Delete Encounter' are also present. To the right of the encounter details, there are sections for 'People', 'Charges and Payments', and 'Edit Claim Line'.

STEP 2: To enter a Project Access specialty care referral request, begin by selecting the “**Patient Data**” menu and then “**Referrals**” from the menu options. This will take you to the Referral Request screen.

The screenshot shows the 'Patient' tab selected in the top navigation bar. The patient information at the top right is: Patient: [REDACTED] #113324, Age 56. Below this, the 'Demographic' section shows address and contact information. The 'Patient Data' menu is open, displaying options: Clinical Summary, Appointments, Encounters, Financials, Lab/Test Order, Lab/Test Result Mgt, Medications, **Referrals**, Notes, Demographics, Medical History, and Documents. The 'Referrals' option is highlighted with a red circle. To the right of the menu, there are sections for 'Phone Numbers' (Number: 619-783-4567, Type: Home) and other patient details like DOB.

STEP 3: On the Referral Request screen, select “Project Access” or “CCHCN” from the programs listed. Use the drop-down menu to select the encounter date when the referral request was made (if nothing appears, please refer to Step 1, then select “Add Referral Request.”

The screenshot shows a web-based application interface for managing patient referrals. At the top, a navigation bar includes links for Calendar, Patient (which is selected), Bill, Admin, Actions, Reports, Patient Data, Summaries, Admin, and Case Management. The patient information displayed is "Patient: [REDACTED] #154536, Age 50". Below the navigation, there are sections for Demographics and Criticals. The main content area is titled "Referral Requests Summary" and contains a link to "Add a New Referral Request for this Patient". A "Program" dropdown menu is open, showing three options: "Project Access" (selected), "Other Referrals (Ad Hoc)", and "AHCN Referrals". To the right of the dropdown is a "Select Clinic Visit (if appropriate)" dropdown menu, which is also open and displays three dates: "Wednesday, 04/18/2012 at PCC Special Programs" (selected), "Monday, 12/12/2011 at PCC Special Programs", and "Tuesday, 05/17/2011 at PCC Test Location". At the bottom left of this section is a red arrow pointing to the "Add Referral Request" button. Below this section, there is a "Referral Request History" section with a dropdown menu for filtering by date, program, status, reason, specialty, and service. The history table shows one entry: "October 15, 2012" under "Referral Request", "Project Access Requested Positive fecal occult x 3; family hx of colon cancer, Gastroenterology Other" under "Reason", and "Specialty" and "Service" columns.

STEP 4: The next screen allows you to enter more detailed information about the referral you are requesting.

- Use the drop-down list to select the specialty you are requesting from the list of available choices.
- Translation and transportation services are not provided by Project Access or CCHCN. The default selection is “No,” **Please do not change this.**
- Enter the patient’s preferred time slot in the drop down menu and all other available times in the Notes/Comments section on the right-hand side of the screen.
- Further down on the screen is a text field where you must enter the reason for the referral. This should be a brief summary taken directly from the primary care provider’s note explaining why a specialty care consult is needed.
- Provide a clinical summary and the purpose of the referral request (patient history, diagnoses, test results, consultations, evaluations, treatments, etc.). Again, this should be a brief summary based on the primary care provider’s progress note. After you finish entering this information, select **“Save and Send to Program Manager for Appointment.”**

The screenshot shows a software interface for a medical referral request. At the top, there are two tabs: "Demographics" and "Criticals". Below these are sections for "Referral Request: Project Access", "Program Options", and "Encounter Info".

- Referral Request: Project Access:**
 - Request Date: November 23, 2012
 - Eligibility Expires: Y
 - Eligible Thru: 07/23/2013
 - Federal Poverty Level: 138% VF 20.00 / PF 35.00
- Program Options:**
 - Specialty Needed: General Surgery (highlighted with a red arrow)
 - Translator Needed: N (highlighted with a red arrow)
 - Referral Service: (blank)
 - Transportation Needed: N (highlighted with a red arrow)
- Encounter Info:**
 - Date of Encounter: 04/18/2012
 - Encounter Location: PCC Special Program
 - Reason: Primary Care
- Notes/Comments:** A large text area containing the following text:

RUQ pain and abdominal US showing gallstones.
- Brief History with Diagnosis and Results:** A text area containing the following text:

Recurring RUQ abdominal pain for 2 mos. now. Abd US done in 09/12 shows multiple <1cm stones in the gallbladder.
- Buttons:**
 - Save & Send to Program Manager for Appointment (highlighted with a red arrow)

If the clinic performs any action regarding the referral, such as uploading documents or contacting the patient, or if there is any update regarding the referral, the clinic should enter a note in the Notes/Comments section.

STEP 5: You should now see a pop-up screen giving you the option to:

- Continue with the referral request
- Cancel the referral request
- Go back to the previous screen if you are unsure that the referral information you entered is complete and accurate

When the information is complete select “**Continue with this Referral Request.**” The request will now be saved to the system for further review by Project Access staff.

Patient: [REDACTED] Patient #154536, Age 50

Calendar Patient Bill Admin

Actions Reports Patient Data Summaries Admin Case Management

Demographics

Criticals

Referral Request: Project Access

Request Date: November 23, 2012
Eligibility Expires: Y
Eligible Thru: 07/23/2013
Federal Poverty Level: 138% VF 20.00 / PF 35.00

Program Options

Specialty Needed: General Surgery

Translator Needed: N

Referral Service: (blank)

Transportation Needed: N

Requested Slot: Monday

Referral Assessment/Reason:
RUQ pain and abdominal US show[REDACTED]

Encounter Info

Date of Encounter: 04/18/2012 Treating Provider: Dorazio, Charity
Encounter Location: PCC Special Programs Procedures: 99202
Reason: Primary Care Diagnoses: 250.405; 1,272.4

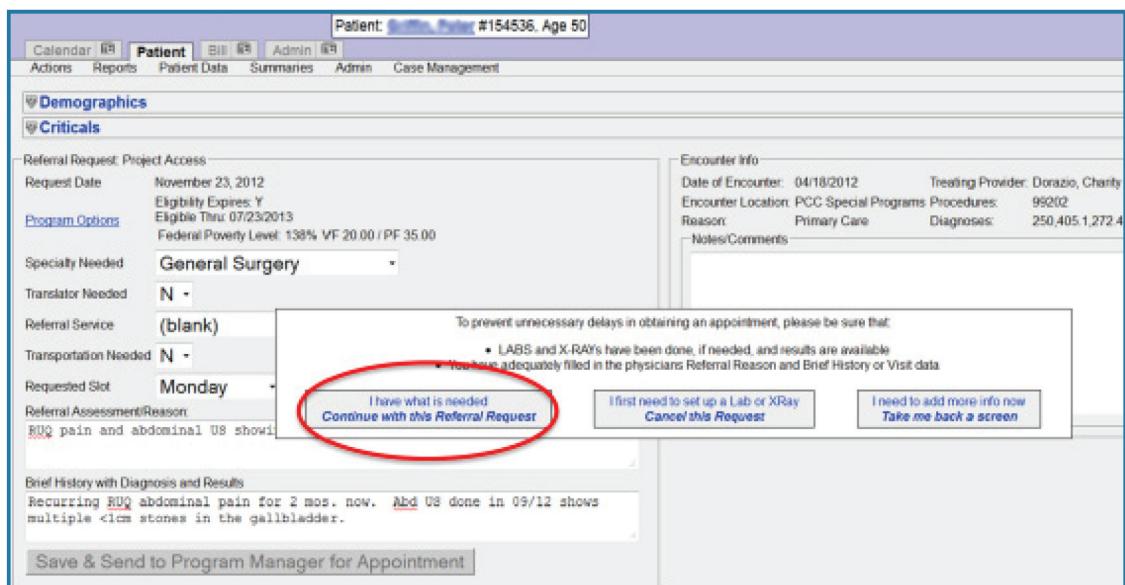
Notes/Comments

To prevent unnecessary delays in obtaining an appointment, please be sure that:
• LABS and X-RAY's have been done, if needed, and results are available
• You have adequately filled in the physician's Referral Reason and Brief History or Visit data

I have what is needed **Continue with this Referral Request** I first need to set up a Lab or XRay **Cancel this Request** I need to add more info now **Take me back a screen**

Brief History with Diagnosis and Results
Recurring RUQ abdominal pain for 2 mos. now. Abd US done in 09/12 shows multiple cilm stones in the gallbladder.

Save & Send to Program Manager for Appointment



STEP 6: Project Access uses CHLCare to update the status of a request as it goes through the scheduling process. When a referral is entered into CHLCare, the status is shown as “**Requested**.”

Project Access will review the referrals for completeness. Items reviewed include:

- Program Eligibility (e.g. Montgomery Cares, Nexus Montgomery)
- Documents needed to process the referral

The screenshot shows the 'Referral Status' section of the CHLCare interface. A red circle highlights the 'Requested' status option in the list of status choices. Other options include 'Requested / Eligibility Pending', 'Appointment Pending', 'Appointment Confirmed', 'Appointment Kept', 'Appointment No-Show', and 'Returned'. The right side of the screen displays 'Appointment Details' for a patient named N/A, including encounter information, provider details, and a notes/comments section where 'Call Made?' is set to 'No'.

All communication regarding a referral should be documented in the CHLCare notes section. Any related email correspondence should be copied into the CHLCare notes section to be sure that all relevant parties have access to all information about a particular referral. Initial every note you enter. Notes are automatically date stamped.

The screenshot shows the same CHLCare interface as above, but with a red arrow pointing to the 'Notes/Comments' section in the 'Appointment Details' panel. This section contains a note about progress and lab reports, indicating that a recent note was deleted and the user is prompted to click on the X to re-enter it. The note also mentions older progress notes and lab work from November 2012.

Project Access cannot schedule specialty care appointments for patients with missing and/or expired eligibility. Before entering a referral request, please make sure the patient's eligibility status is up to date. If the patient's Montgomery Cares enrollment expires within 90 days, the patient will need to renew it prior to initiating the referral.

SUBMIT SUPPORTING CLINICAL DOCUMENTATION

Project Access requires appropriate supporting documents prior to processing specialty referrals. Consult current “**Referral Guidelines**” or consult the referring provider to determine appropriate documentation. Examples of supporting documents include:

- The progress note written by the primary care provider requesting the referral
- Lab reports supporting the referral request. Labs must be current within 90 days of referral or per Referral Guidelines.
- Imaging reports (X-ray, CT, MRI results) supporting the referral request
- **Any hospital notes if the patient was hospitalized during the past year for the current medical issue (please indicate in the Notes/Comment sections which hospital the patient visited and the date of discharge). Include hospital discharge summary and diagnostic testing. Patient discharge instructions are not acceptable.**
- Prescription for physical therapy, diagnostic orders, or other procedure

Please label supporting referral documents CHL#_Name/Type of Document_Date of Document.

Depending on the patient’s condition and the specialty being requested, the type of supporting documents needed varies. For example, an orthopedic surgery referral request for knee pain will require an imaging study of the affected joint. A general surgery referral request for right upper quadrant abdominal pain concerning gallstones will usually require basic lab work and an abdominal ultrasound. If you are unsure about what supporting documents to submit with a referral request, consult the Specialty Care Referral Guidelines to determine what diagnostics are required. If you are still unsure, consult the referring provider or other clinician at your clinic.

Supporting documents should be uploaded directly into CHLCare. After a referral request has been submitted, Project Access staff may require additional documentation. Project Access will enter a note in the Notes/Comments section of the referral screen and will email you with the requested information. Please enter into CHLCare that the documents have been uploaded.

Project Access will not schedule appointments for referral requests submitted without appropriate supporting documents. The referral initiator is responsible for responding to requests for supporting documents in a timely manner. Failure to provide required documentation will delay scheduling. The referral will be returned if supporting documents are not uploaded into CHLCare within two weeks of the referral.

CONFIRM APPOINTMENT INFORMATION

STEP 1: When an appointment has been scheduled, the status of a referral request changes to “**Appointment Pending**.” The date, time and location of the specialty care appointment appears on the top right of the referral screen. Project Access staff will notify you by email or phone that an appointment has been scheduled.

The screenshot shows a software interface for managing patient appointments. On the left, there's a sidebar with a dropdown menu showing "F 35.00" and a "Requester" section with "Requester: Amit Rahman". Below that is a note: "'Update': 'On 11/26/2012 shows multiple <1cm stones in the abdomen'". In the center, a modal window titled "APPOINTMENT DETAILS" is open. It shows the following information:

- Specialist: Dr. Michael Zenilman
- Edit Time: 11:00 AM - December 5, 2012
- Location: 6420 Rockledge Dr Suite 220, Bethesda, MD 20817
- Phone: (301) 896-6880
- Buttons: "Save" and "Cancel this Appointment"

Below this is the "ENCOUNTER INFO" section:

Date of Encounter	Treating Provider
04/18/2012	Dorazio, Charity
Encounter Location	Procedures
PCC Special Programs	99202
Reason	Diagnoses
Primary Care	250,405.1,272.4,278

Requester: Amit Rahman
Notes/Comments:

Call Made? Yes No

Click on the X below to **crossout** a recent note, then select "Update".

X 11/20/2012 Progress note, lab report and US abdomen received. KF
X 11/21/2012 Progress note and lab report >6 mos. old. Requesting more recent progress note and labwork. IG
X 11/21/2012 Requested supporting docs faxed. AR
X 11/23/2012 New progress note and labwork received. KF
X 11/26/2012 Appointment with Dr. Zenilman scheduled for Wed. Dec 5th @ 11AM. Please confirm with patient. Email to requestor sent. IG

Project Access works with a limited number of specialists, most of whom volunteer their time to see low-income, uninsured patients. As a result, Project Access cannot always guarantee that a referral request will be scheduled. When capacity is limited in a particular specialty area, Project Access nurses triage pending referral requests according to clinical priority. If an appointment cannot be scheduled, Project Access nurses will return the referral request and contact you by email to discuss next steps.

STEP 2: The referring clinic is ultimately responsible for contacting the patient to confirm the appointment. As a courtesy to the clinic, Project Access will make an initial attempt to contact the patient. If unsuccessful, the clinic must contact the patient and confirm that he or she will be able to make the appointment. Once the appointment is confirmed, change the referral status to “**Appointment Confirmed**” to indicate that the patient has been contacted.

For **surgeries/hospitalizations**, only Project Access staff should select “Appointment Confirmed” in CHLCare. **The clinic should never select “Appointment Confirmed” for surgeries/hospitalizations.**

The screenshot shows a software window for managing patient appointments. On the left, there's a sidebar with a dropdown menu containing the following items:

- Requested / Eligibility Pending
- Requested
- Appointment Pending
- Appointment Confirmed
- Appointment Kept
- Appointment No-Show
- Returned

A red arrow points from the "Appointment Confirmed" option in the sidebar to the "Appointment Status" dropdown in the main appointment details panel. The main panel displays the following information:

Practitioner: Dr. Michael Zenilman
Specialist: Dr. Michael Zenilman
Edit Time:
11:00 AM • December 5, 2012 • Save

Location:
6420 Rockledge Dr Suite 220
Bethesda, MD 20817
Phone: (301) 896-6880

Cancel this Appointment

Encounter Info

Date of Encounter:	04/18/2012	Treating Provider:	Dorazio, Charity
Encounter Location:	PCC Special Programs	Procedures:	99202
Reason:	Primary Care	Diagnoses:	250,405.1,272.4,278

Requestor: Amit Rahman
Notes/Comments

Call Made? Yes No

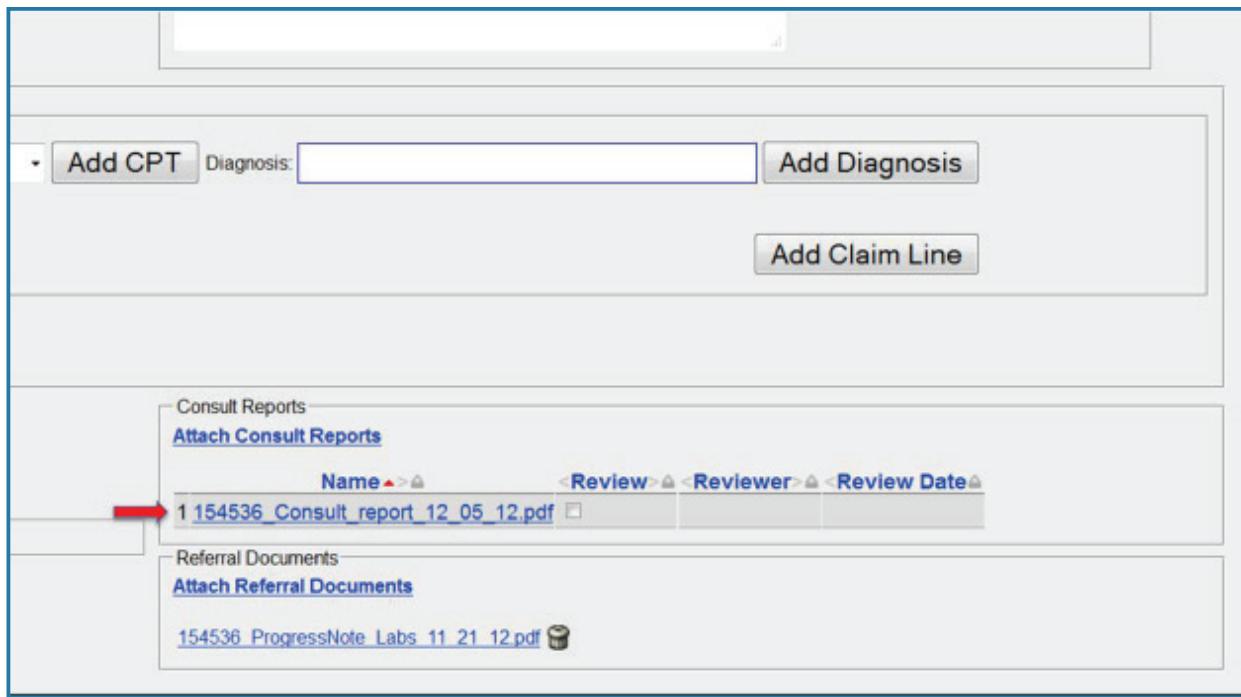
Click on the X below to ~~CROSSOUT~~ a recent note, then select “Update”.

X 11/20/2012 Progress note, lab report and US abdomen received. KF
X 11/21/2012 Progress note and lab report >6 mos. old. Requesting more recent progress note and labwork. IG
X 11/21/2012 Requested supporting docs faxed. AR
X 11/23/2012 New progress note and labwork received. KF
X 11/26/2012 Appointment with Dr. Zenilman scheduled for Wed. Dec 5th @ 11AM. Please confirm with patient. Email to requestor sent. IG
X 11/27/2012 Patient contacted and appointment confirmed. AR

It is absolutely critical for you to contact the patient in a timely manner and confirm whether he/she will be able to make it to the scheduled appointment. If the patient is unable to keep the scheduled appointment, it is equally important to inform Project Access staff in a timely manner so that the specialty care provider can be informed.

VIEW CONSULT REPORTS

After the specialist has seen the patient, Project Access changes the referral to “**Appointment Kept**” and uploads the consult report from the specialist into CHLCare. Consult reports can be viewed on CHLCare by clicking on the filename listed in the “**Consult Reports**” area in the bottom section of the referral screen.



If you are looking for a consult report, please check CHLCare prior to contacting the specialist’s office or Project Access

RETURNED REFERRAL REQUESTS

Project Access may return a referral for multiple reasons, including:

- Project Access is unable to secure an appointment within a reasonable amount of time due to lack of availability
- The appointment is not confirmed with the patient
- Required documentation is not received
- Further primary care evaluation is indicated
- Patient is not eligible for specialty care

Whenever Project Access returns a referral, staff will notify you by email or phone, and will change the status of the referral to “Returned.”

The screenshot shows a software application window for managing referrals. On the left, there's a vertical sidebar with several input fields and a dropdown menu containing the text "SA normal.". To the right, there are two main sections: "Referral Status" and "Appointment Details".

Referral Status: This section contains a dropdown menu with the following options:

- Requested / Eligibility Pending
- Requested
- Appointment Pending
- Appointment Confirmed
- Appointment Kept
- Appointment No-Show
- Returned

A red arrow points to the "Returned" option in this list.

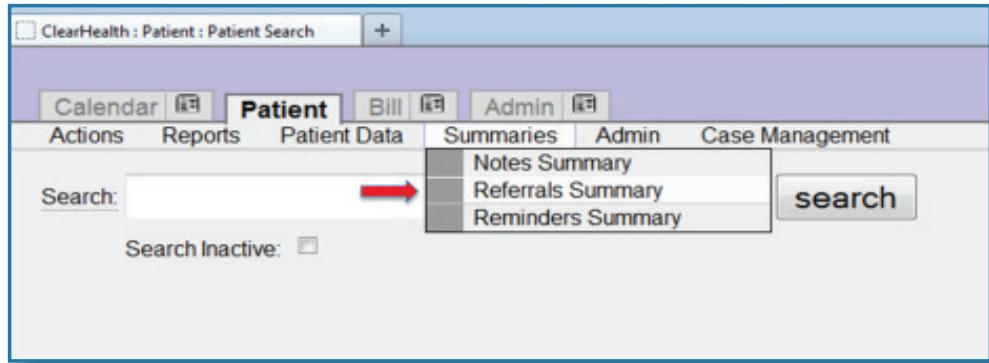
Appointment Details: This section includes the following information:

- N/A
- [Set up an Appointment for this Request](#)
- Encounter Info:** Date of Encounter: 04/18/2012, Treating Provider: Dorazio, Charity; Encounter Location: PCC Special Programs, Procedures: 99202; Reason: Primary Care, Diagnoses: 250,405.1,272.4,278.
- Requestor:** Amit Rahman
- Notes/Comments:** Call Made? Yes No
Click on the X below to ~~CROSSOUT~~ a recent note, then select "Update".
 11/21/2012 Reviewed documents. Unable to schedule appt. at this time.
Scheduling high-priority requests only. Returning referral request. Email sent to clinic. IG

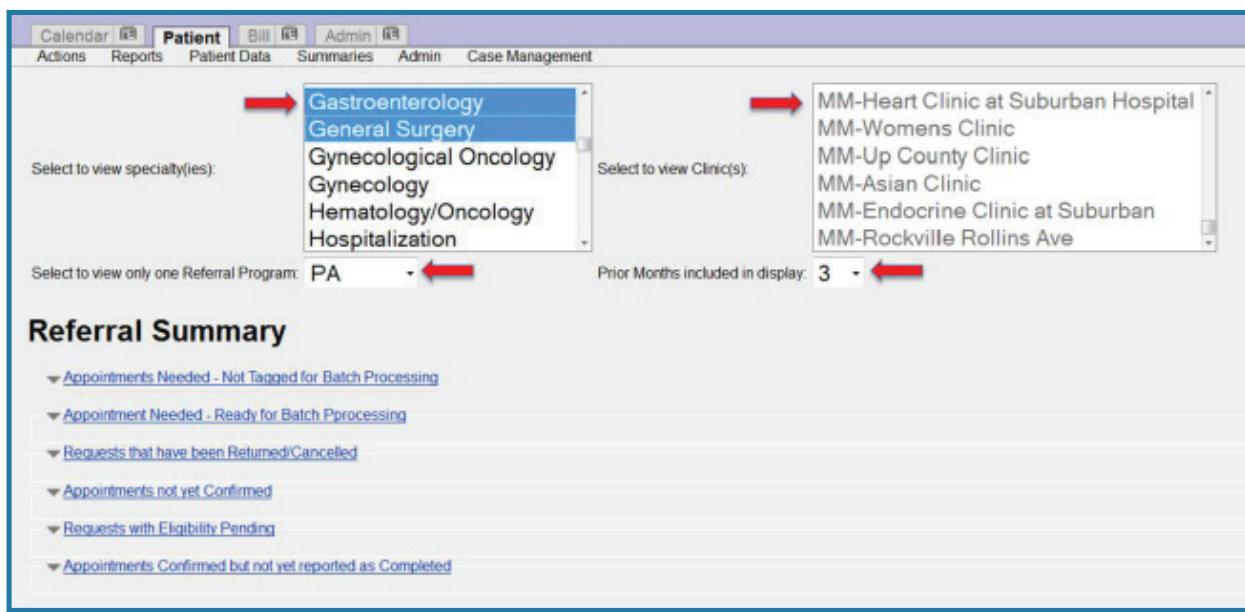
A red arrow points to the note about scheduling issues and returning the request.

TRACK MULTIPLE REFERRAL REQUESTS FOR A SINGLE PATIENT

STEP 1: CHLCare has a Referral Summary screen that summarizes your referral requests by status. To access the screen, select the “**Summaries**” menu and then “**Referrals Summary**.”



STEP 2: The filters on the Referral Summary screen allow you to customize the reports you generate. You can view the status of referrals for a specific specialty or multiple specialties by selecting them from the list in the upper left corner of the screen. To select multiple specialties, hold down the “**CTRL**” key while clicking on your selections. Using the list on the upper right corner of the screen, you can track referral requests from one or more clinic locations. The Referral Program menu allows you to view referral requests made to a specific program, such as Project Access or CCHCN. Lastly, the menu in the middle of the screen allows you to select how many months back you want the reports to span.



STEP 3: After you have set the filters according to your preferences, you can view summary lists of referrals by status. Selecting “**Appointments Needed – Not Tagged for Batch Processing**” will generate a list of all referral requests that have yet to be scheduled for an appointment. Returned referrals will not be on this list.

The screenshot shows a software interface for managing referrals. At the top, there are dropdown menus for selecting specialties (General Surgery, Gynecological Oncology, Gynecology, Hematology/Oncology), clinics (PCC Special Programs, PCC Test Location), and a program (PA). Below these are dropdowns for 'Prior Months included in display' (set to 3) and 'Select to view only one Referral Program' (set to PA). The main section is titled 'Referral Summary' and contains a table of 9 rows. Each row includes columns for Last Name, First Name, MRN, Referral Request date, Reason, and Program Name. A red arrow points to the 'Reason' column of the first row.

Last Name	First Name	MRN	Referral Request	Reason	Program Name
1	John	12345	November 21, 2012	Multiple gallstones f/u	Project Access
2	Jane	12345	November 20, 2012	35 y/o female patient presents with history of pain and swelling of the Lt groin for the past 4 months.	Project Access
3	Jane	12345	November 20, 2012	35 y/o female patient presents with history of pain and swelling of the Lt groin for the past 4 months.	Project Access
4	James	12345	November 16, 2012	Removing of a Nevus on Scalp.	Project Access
5	Jane	12345	November 15, 2012	62 y/o female needs to have Laparoscopic cholecystectomy. patient was in the ER for pain and N/V. radiology report showed gallstones with biliary colic.	Project Access
6	Jane	12345	November 13, 2012	60 y/o female needs to have an evaluation for a non movable mass on the Right supraclavicular area. Mass measures 1.5x1 inches.	Project Access
7	John	12345	November 09, 2012	Baker's cyst x 2 months	Project Access
8	John	12345	November 08, 2012	Hx of gallstones on and off. Colic since June 2012.	Project Access
9	James	12345	November 08, 2012	Hernia R inguinal pain x 4 months; gradually getting worse.	Project Access

STEP 4: Select “**Requests that have been Returned/Cancelled**” to generate a list of referral requests that are returned and no longer being considered for appointments. The reason a referral was returned will be listed in the Notes/Comments section of each individual returned referral.

The screenshot shows the same software interface as the previous one, but with a different filter selected. The dropdown menu at the top now shows 'Requests that have been Returned/Cancelled'. The main section is titled 'Referral Summary' and contains a table of 6 rows. Each row includes columns for Last Name, First Name, MRN, Referral Request date, Reason, Program Name, and Location. A red arrow points to the 'Reason' column of the last row.

Last Name	First Name	MRN	Referral Request	Reason	Program Name	Location
1	John	12345	November 06, 2012	Surgery scheduled by Dr. Ansari for Friday November 9 per patient's son.	Project Access	MM-East Mont Svc Ctr
2	Jane	12345	November 06, 2012	Right lower quadrant abdominal pain. Worse with standing, running, and bending. Slight palpable separation of muscle.	Project Access	MM-Gburg Ascn Moby
3	James	12345	November 05, 2012	55 y/o female needs to have an evaluation for removal of 5 cm soft mass on the lower lip.	Project Access	Mercy Health Clinic
4	John	12345	November 01, 2012	Thyroid Nodule on R lobe mildly enlarged.	Project Access	Proyecto Salud-Wheaton
5	John	12345	October 31, 2012	L thigh Lipoma	Project Access	Proyecto Salud-Wheaton
6	Jane	12345	October 31, 2012	36yF presents for concern regarding a birthmark on her upper thigh that is now irritating her. Pain is only when her underwear or her pants rub against it, sometimes causing a open wound that doesn't bleed and resolves on its own after wearing looser-fit	Project Access	MM-Up County Clinic

STEP 5: Select “Appointments Not Yet Confirmed” to generate a list of referral requests that have been scheduled, but need to be confirmed with the patient. This summary is especially important for you because you are responsible for contacting the patient to confirm the appointment. It is also very important that you update the referral status to “Appointment Confirmed” after confirming with the patient.

Select to view only one Referral Program: PA - Prior Months included in display: 3 -

Referral Summary

- ▼ Appointments Needed - Not Tagged for Batch Processing
- ▼ Appointment Needed - Ready for Batch Pprocessing
- ▼ Requests that have been Returned/Canceled
- ▼ Appointments not yet Confirmed 

Last Name	First Name	MRN	Referral Request	Reason	Program Name	Location
1	Patricia		November 15, 2012	BIRADS 4- SUSPICIOUS. NEEDS BX/ SURG CONSULT	Project Access	MM-Up County Clinic
2	James		October 01, 2012	gall stones	Project Access	MM-IBNS at IEC
3	Thomas		September 18, 2012	Painful sebaceous cyst on upper back.	Project Access	Proyecto Salud-Wheaton
4	James		September 12, 2012	57 yo cau male with bilateral inguinal hernia. Refer to general surgery for correction.	Project Access	MM-Gburg Ascen Moby
5	James		September 06, 2012	f/u requested by Dr. Marter	Project Access	MM-East Mont Svc Ctr
6	James		August 24, 2012	abscess on L neck	Project Access	CCACC PAVHC-Med Clinic

STEP 6: Montgomery Cares patients must have current eligibility. Select “Requests with Eligibility Pending” to generate a list of referral requests for which the patient’s Montgomery Cares eligibility is either expired or undocumented. **This summary is especially important, because no further action can be taken until you update the patient’s eligibility.**

Referral Summary

- ▼ Appointments Needed - Not Tagged for Batch Processing
- ▼ Appointment Needed - Ready for Batch Pprocessing
- ▼ Requests that have been Returned/Canceled
- ▼ Appointments not yet Confirmed
- ▼ Requests with Eligibility Pending

Last Name	First Name	MRN	Referral Request	Reason	Program Name	Location
1	James	73055	November 16, 2012	Foot/nail care Lymphadenopathy, DM?	Project Access	MM-East Mont Svc Ctr
2	James	147436	November 08, 2012	Colonoscopy scheduled for 11/19/12 at 2:00pm w/Dr. Weinstein @ 5550 Friendship Blvd, Suite T90, Chevy Chase, MD 20815, Phone: 301-654-252.	Project Access	Marys Center Flower Ave
3	James	92078	October 25, 2012	Sleep Study per Dr Kim	Project Access	PCC Special Programs
4	James	92078	October 15, 2012	elevated hemoglobin and hematocrit	Project Access	PCC Special Programs
5	James	23602	October 15, 2012	Blurred vision. In need of Cataract surgery.	Project Access	Proyecto Salud-Wheat
6	James	145885	October 03, 2012	54 YO female with persistent swelling on right posterior neck. Had seen an ENT who ordered a CT; CT was negative. Pt was supposed to F/U with ENT but Dr. Bond is no longer in practice. Please evaluate for possible biopsy.	Project Access	HC - Gaithersburg MC
7	James	122518	October 01, 2012	Hyperthyroidism, Goiter.	Project Access	Proyecto Salud-Wheat

STEP 7: Select “Appointments Confirmed but not yet Reported as Completed” to generate a list of referrals that were scheduled but for which Project Access has no record of the appointment being completed. Project Access will always change the status of a referral to “Appointment Kept” when a billing invoice or consult report has been received/uploaded into CHLCare.

Referral Summary						
Appointments Needed - Not Tagged for Batch Processing						
Appointment Needed - Ready for Batch Processing						
Requests that have been Returned/Canceled						
Appointments not yet Confirmed						
Requests with Eligibility Pending						
Appointments Confirmed but not yet reported as Completed ←						
Last Name	First Name	MRN	Referral Request	Reason	Program Name	Location
1			November 20, 2012	Follow Up/ Dr. Kashif Firozvi on Sunday 12/09/2012 at 10:00am	Project Access	CCI-Gaithersburg Hematology/Oncology
2			November 19, 2012	Surgery scheduled for 12.20.12	Project Access	PCC Special Programs General Surgery
3			November 15, 2012	Please evaluate URGENTLY for cholecystectomy. 35 yo male who has had consistent RUQ pain since September. Found to have gallstones and has had multiple subsequent emergency room visits. has continued nausea, pain and anorexia.	Project Access	CCI-Takoma Park General Surgery
4			November 15, 2012	PT per Dr Kholmeyers orders	Project Access	PCC Special Programs Physical Therapy

PROJECT ACCESS CONTACT INFORMATION

If you have any questions regarding the specialty care referral process please contact Project Access:

Main Phone: 301-628-3430

Fax: 301-608-9047

Client Services and Surgical Coordinator, Ana Gamero: 301-628-3444

Client Services Specialist, Karla Rodriguez: 301-628-3421

Nurse, Yvette Hammond: 301-628-3426

Billing, Danielle Carter: 301-628-3413

Main Email: SpecialtyCare@primarycarecoalition.org

Urgent Referrals: SpecialtyNurse@primarycarecoalition.org

Urgent Referrals are those that must be seen by a specialist within 72 hours.

Address: 8757 Georgia Ave., 10th floor

Silver Spring, MD 20910

PrimaryCareCoalition.org



primary care coalition

Project Access is a public-private partnership funded in part by the Montgomery County Department of Health and Human Services (DHHS) and the Nexus Montgomery Regional Partnership, among other funders. This document was developed by the Primary Care Coalition for operational purposes. It has not been reviewed or approved by DHHS or the Nexus Montgomery Board.