

MMC Physician-Hospital Organization  
**Chronic Illness Care Manager / Care Transition Coach**

Name: \_\_\_\_\_

Date of Hire: \_\_\_\_\_

Preceptor: \_\_\_\_\_

Goal: Comprehensive Orientation to MMC PHO & Chronic Illness Care Manager & Care Transition Coach Roles

Objective	Date Complete	Resource Person	Comments
<b>Human Resources Orientation</b>		Gail Allen	Orientation is scheduled for 2PM – 5PM @ Maine Medical Partners; 39 Wallace Ave, South Portland; Phone: 761-0650
Human Resource Support		Dir. Corporate Services	
Required HR Documents (first Day)		Dir. Corporate Services	W4; I9; Prof. License; Code of Conduct; health file; Immunization record; liability; etc.
<b>PHO Office Environment</b>		Dir. Corporate Services	
- All PHO departments intro		Spvr	
- Kitchen/Bathroom		Dir. Corporate Services	
- Doors/Elevators/Stairs/Keys		“	
- Conference Rooms / Booking		“	
- Parking Garage Ticket System		“	
- Office Phone & Voicemail System		“	
- Cell Phone Use, VM set-up, etc		“	
- Copier / Fax / Office Supplies		“	
- Shred box for confidential info		“	
- Mail slots		“	
- Security / ID badge		“	
- Business Cards		“	
- Work Space		Spvr	
<b>Organizational</b>			References: Care Management Orientation Book (Dir. Care Management Office)
Org Chart/Structure MaineHealth / PHO		Dir. Care Management or Spvr	Section #2
PHO Mission /Purpose		Dir. Care Management or Spvr	
PHO Members		Dir. Care Management or Spvr	
MaineHealth / MMC Relationship		Dir. Care Management or Spvr	
<b>CLINICAL IMPROVEMENT PLAN</b>			References: Care Management Orientation Book (Dir. Care Management Office)
- Mission / Vision / Guiding Principles		Dir. Care Management or Spvr	Structure; process; outcome

<b>Objective</b>	<b>Date Complete</b>	<b>Resource Person</b>	<b>Comments</b>
- Chronic Care Model		Dir. Care Management or Spvr	View video or CD from IHI; Care Management Orientation Book Section #7 & 8
- Clinical Improvement Plan		Dir. Care Management or Spvr	Power Point overview; www.mmcphe.org
- Quality Rewards Program		Dir. Care Management or Spvr	- Quality Rewards Program
- MaineHealth Clinical Integration		Dir. Care Management or Spvr	
- MaineHealth Collaboratives		Dir. Care Management or Spvr	
- System Redesign		Dir. Care Management or Spvr	
<b>CARE MANAGEMENT PROGRAM</b>			References: Care Management Orientation Book (Dir. Care Management Office)
Mission / Vision / Program Overview		Dir. Care Management or Spvr	Power point overview; Orientation book
Role of Care Manager		Dir. Care Management or Spvr	
Review job description		Dir. Care Management or Spvr	Section #6, Position Summary
Physician/Practice introductions		Dir. Care Management or Spvr	
<b>Policies &amp; Procedures</b>			Care Management Program Policies & Procedures (Dir. Care Management Office)
Admission / Inclusion / Discharge		Dir. Care Management or Spvr	Policy #3
Patient Rights & Responsibilities		Dir. Care Management or Spvr	Policy #3
Patient privacy / confidentiality		Dir. Care Management or Spvr	Verbal, written, e-mail, etc
Interpreter Use		Dir. Care Management or Spvr	
Staff Safety		Dir. Care Management or Spvr	
Reporting Abuse & Neglect		Dir. Care Management or Spvr	
Occurrence Reporting		Dir. Care Management or Spvr	
Customer Concern Handling		Dir. Care Management or Spvr	
Patient Grievance		Dir. Care Management or Spvr	
Handling a Subpoena		Dir. Care Management or Spvr	
Acceptance of Gifts		Dir. Care Management or Spvr	

Objective	Date Complete	Resource Person	Comments
HIPAA policies		Dir. Care Management or Spvr	
<b>Provider / Patient Care Processes</b>			
Marketing strategies- provider & patient		Spvr	
Referral Mining Strategies		Spvr	
Caseload / Productivity		Spvr	
Caseload Management		Spvr	
Insurance / Payer Relationship / liaison		Spvr	Anthem, Care Partners, etc.
Holistic Patient Assessment		Spvr	Physical, Functional, Psychosocial (mental, emotional, social, cultural, financial, environmental, safety, etc)
Evidence-based Care Plan development/ management		Spvr	
Self Management Goal Setting/Action Plan		Spvr	
Motivational Interviewing Strategies			Attend USM 2-day workshop offered 2x/yr
Behavior Change Process		Spvr	<b>Reference:</b> <i>Chronic Care Management, A Toolbox for Action</i> ; Chapter 2: pgs12-17; Care Management Orientation Book Section #9 (Dir. Care Management Office)
Low Literacy Tools / Strategies		Spvr	
Cultural Sensitivity and Awareness		R. Warnock	
<b>Diabetes Care Management</b>		B. Wilcox, M. Quinn	
Basic Educational Materials			Target Diabetes Book; MaineHealth approved education materials; Self Care Report
Diabetes Self Management Education Class			Maine Center for Diabetes; 175 US Route 1, Scarb. 2 <sup>nd</sup> & 3 <sup>rd</sup> Thurs of month from 9A-3:30P; bring lunch. Call Nancy Fortier at 885-7700 to see if OK to observe class.
Meal Planning Class			Maine Center for Diabetes; 175 US Route 1, Scarb. Every Monday from 9A->11A. Call Nancy Fortier at 885-7700 to see if OK to observe class.
Target Diabetes Nursing Study Guide			Self Study
<b>Asthma Care Management</b>		B. Wilcox, M. Quinn	
Basic Educational Materials			Asthma Information for Children and Families; Asthma Information for Adult Patients and Families; Self Care Report
Basic Asthma Education			Attend AH! Asthma Program education sessions on “Intro to Asthma Management” and “Asthma Skills and Competency”. See Education Calendar
Maine Lung Assoc. Asthma Institute			Annual; C. Swift will alert when notified of offering
Asthma Self Study			Self Study: Care Management Orientation Book section #11 Resources (Dir. Care Management Office)

Objective	Date Complete	Resource Person	Comments
Asthma Skills & Competency Checklist			Care Management Orientation Book section #11 Resources (Dir. Care Management Office)
<b>Depression Care Management</b>		G. Whittier	Schedule training with G. Whittier
<b>Cardiovascular Disease Management</b>			
Basic Educational Materials			CVD Info for Patients and Families; Self Care Report
Nutrition		L. Gordon	
Tobacco Treatment Program / Center for Tobacco Independence (CTI)		Spvr	
CarePartners		Spvr	
Partnership for Healthy Aging		Spvr	
MaineHealth Learning Resource Centers		Spvr	Locations: Scarborough, Falmouth, Portland; encourage site visit; provide copy of current course listing
Advocacy role		Spvr	
MMC Care Coordination / ED linkage		Spvr	
<b>Information Services</b>			
- Remote Access		G. Mazzone	Secure ID Token; paperwork required to obtain
- Remote Access		Remote Access	Appt with MMC Remote Access Team
- Hardware (Printer/copier/fax)			Remote Access staff will set up printer at same appt as above
- MMC PC Training Opportunities			Course schedule available at <a href="http://my.mmc.org/C15/PCTRAIN/HTML/schedule.htm">http://my.mmc.org/C15/PCTRAIN/HTML/schedule.htm</a> ; register for classroom training
- MMC IS Help Desk			662-6400; IS HelpDesk @mmc.org
- MaineHealth Link		Spvr	
- Clinical Improvement Registry (CIR)		Dir. Care Management or Spvr	General features; Practice tools; CM elements
- CIR HelpDesk		G. Mazzone	771-2004 Prompt "5"
- Care Management database		Dir. Care Management or Spvr	
- EMR (Logician, EPIC)		M. Quinn, A. Quatticci	
<b>Education &amp; Resources</b>			
- Professional education offerings		Dir. Care Management or Spvr	Registration Process
- Professional education resources			
- Internet resources			MaineHealth, ADA, MedlinePlus, etc.
- Community resources			
- Patient education resources		Spvr	Supply Room, outside supervisors' cubicle
- Resource library- use & expansion		Spvr	Shared/Care Management/Resource Materials
- Reference books, manuals, etc		Spvr	
- Nursing Drug Handbook		Spvr	

Objective	Date Complete	Resource Person	Comments
<b>Quality Leadership</b>			
Process Improvement		C. Swift	
MH & PHO Quality Workgroups		C. Swift	
CM Outcome Indicators		C. Swift	
Tracking , Analysis & Reporting		C. Swift	
<b>Individual / Group Meetings</b>			
Larry Anderson, MD			
Behavioral Health Care Program		R. Dolley	
<b>CARE TRANSITION COACH</b>			
Role; job description			
Work processes			
Intro to hospital work flows/staff			
Documentation/ Reporting			

### SKILLS CHECKLIST

Information & Skills	Date Reviewed	Return Demo Date
<b>NETWORKS &amp; DRIVES</b>		
<i>Computer Basics &amp; Language</i>		
Laptop Care, Use & Maintenance		
Copying files to the shared drive using Windows "E"		
Copying "Favorites" folder to the shared drive		
Various drives available and their use (C, F, H)		
<b>GROUPWISE/ GROUPWISE FULL CLIENT/WEBMAIL</b>		
Proxy Access		
Creating a Group		
Adding new employee(s) to group email address book		
- Calendar		
- Tasks		
- Notes		
How to "find" an email, task, appointment		
Email attachments (opening/saving and attaching)		
Web site link included in email message		
<b>WORD and EXCEL</b>		
How to use the "Help" feature		
Creating a Word document		
Saving a Word document		
Excel document: expense sheet		
How to open and edit Excel Spread Sheets		

Policy and Role Elements	Date Reviewed
<b>Policy and procedures</b>	
Mileage reimbursement policy	
Expense sheet submission & necessary receipts	

<b>Care Management Performance Guidelines</b>	
Documentation timeliness	
Work week, schedule, requests for time off, salaried guidelines	
Calendar & Tasks	
Cell phone – use & set up; contact for issues (Director of Corporate Services, company sales rep)	
Writing note in Soap Format (See Soap Note Format document)	

### ENCOUNTER OBSERVATIONS

Preceptor Encounter Observations	Date	Initials	Comments
<b>Diabetes</b>			
IE – DM #1			
IE – DM #2			
Optional IE – DM #3			
SE – DM (face to face vs. TE)			
SE – DM (face to face vs. TE)			
SE – DM (face to face vs. TE)			
SE – DM (face to face vs. TE)			
Documentation			
<b>Asthma</b>			
IE – Asthma #1			
Optional IE – Asthma #2			
SE – Asthma (face to face vs. TE)			
SE – Asthma (face to face vs. TE)			
Documentation			
<b>CVD</b>			
IE – CVD #1			
Optional IE – CVD #2			
SE – CVD (face to face vs. TE)			
Documentation			
<b>Depression – Telephonic Only</b>			
IE – Depression #1			
IE – Depression #2			
SE – Depression #1			
SE – Depression # 2			
Optional SE – Depression #3			
Documentation			

<b>Other Encounters</b>			

**CASELOAD MANAGEMENT**

<b>Provider/Patient Care Processes</b>	<b>Date</b>	<b>Initials</b>	<b>Comments</b>
Practice-specific orientation			
Interdisciplinary Team meetings / communication processes			
Community Resources / Development			
<b>Caseload Management</b>			
EHR Practice Referral Process			
Referral of Patient in CIR			
Creating Doctor/Patient Folders			
Scheduling initial/subsequent encounters			
Encounter activity & management			
Communication with Doctor/Nurse/MA			
<b>Clinical Improvement Registry (CIR)</b>			
Care Management Caseload Report			
Patient Selection			
Patient Reports			
Visit Summary			
“Inactive” status review & action			
<b>Documentation of:</b>			
Self Management Goals			
Care Management Encounter			
Information updates			
<b>EMR ( Logician, EPIC)</b>			
Access to EMR			
Documentation Components			
Copying note to CIR and Word document(s)			
Adding .metrics to note			
Updating .metrics data			
Ending update			
Routing note to provider/staff			
<b>Encounter Documents</b>	<b>Date</b>	<b>Initials</b>	

<p>Word Documents:  Admission Agreement, Rights &amp; Responsibilities, Patient Contact Information, Narrative, Medication List, Self Management Action Plan, Care Manager Patient Intro Letter, GlaxoSmithKline Risk Assessment, Chronic Illness Specific ( Diabetes, Asthma, etc.) Education Checklist, Initial Assessment</p>		

**Please complete during orientation, then sign and forward to supervisor for inclusion in personnel file**

EMPLOYEE SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

PRECEPTOR SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

SUPERVISOR SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_