

**PURPOSE:**

The purpose of this policy is to ensure that \_\_\_\_ (Practice) orients new patients, and has a process and materials that it provides patients, families and caregivers on the role of the medical home.

**POLICY:**

It is the policy of the Practice to be responsible for coordinating patient care across multiple settings;

- Instructions on obtaining care and clinical advice during office hours and when the office is closed;
- The Practice functions most effectively as a medical home if patients and families provide a complete medical history and information about care obtained outside of the Practice;
- The care team gives the patient, family and caregiver access to evidence-based care, education and self-management support;
- The scope of services available within the Practice including how behavioral health needs are addressed; and
- The Practice provides equal access to all of their patients regardless of source of payment.

**PROCEDURES:**

The Practice provides patients, families and caregivers information on the obligations of the medical home, as well as the responsibilities of the patient, family and caregiver as partners in care. Specific services that patients can expect from the Practice, whom to contact for specific concerns, questions and information, and the roles of the care team, including the Health Coach, are explained during an orientation for new patients, and in writing to all patients and families. The Practice provides the information in multiple formats to accommodate patient preference and language needs.

The information provided to patients, families and caregivers includes, but is not limited to:

- **Goals:** A concise statement of the principles of the patient-centered medical home and the Practice's intended role to care for and coordinate the range of the patient's care across all settings.
- **Access:** The Practice's office hours, telephone numbers, where to seek after-hours care, and how to communicate with and request clinical advice after office hours.

The Practice provides equal access for all patients, regardless of insurance status. Equal access regardless of insurance status is stated in the material.

- Expectations: A description (a checklist, for example) of the comprehensive patient information the Practice needs from the patient and patient's previous and other current providers to effectively serve as the patient's medical home. At a minimum, this information includes current medications, allergies, visits to specialists, medical history, health status, behavioral health care, recent test results, self-care information and data (or where to obtain it) from recent hospitalizations, specialty care or emergency department visits.

### **Quality Control**

The Practice monitors the policy and procedure in the following manner:

- Annual monitoring of the percentage of new patients receiving an orientation with the Practice's medical home statements of goals, access and expectations.
- Information about office hours, telephone numbers and contacts is updated on the Practice's website within 24 hours of any changes to these data.
- Printed patient information materials about the Practice's medical home goals, etc., are kept updated and addendums or revised statements are re-printed and mailed and/or electronically transmitted via a patient portal notification to all patients when major changes occur.

DATE	ANNUAL REVIEW/ SUMMARY OF CHANGES	APPROVED BY