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HOME CENTERED CARE INSTITUTE

HBPC Practice Intake Guide

Purpose

Create a communication guide for staff who conduct intake calls and/or respond to calls from patients and/or caregivers interested in enrolling in a home-based primary care practice.

Initial steps

- Answer the phone using the approved practice greeting. It is important to provide your name and department when greeting the caller.
- Locate the patient in the Electronic Health Record (EHR) by verifying their name and date of birth. If necessary, use the patient's address as an additional identifier. Note, the EHR may have additional search features to assist in identifying callers, e.g. phone number. You may find patients and/or caregivers who are difficult to understand or they may provide an incorrect date of birth; therefore, be prepared to listen closely and consider utilizing a translation service if needed.
- Verify the main reason for patient referral, i.e. is there an immediate medical need that requires attention? Is this to establish care based on their limitations?
- Verify whether the patient was admitted to the hospital or skilled nursing facility within the past 30 days; if so, document location and approximate date(s) of service.
- Confirm preferred contact number to reach the patient/caregiver and ask if there is a family member who handles the patient's affairs that they prefer you speak with. Record contact name(s) and phone number(s) for future reference and in case the call is disconnected.
- If this is an outbound call to discuss the initiation of services with the patient/caregiver, communicate the purpose of your call and confirm they have the time needed to go over services and verify information. Note, this is an ideal opportunity to identify the best person to speak with regarding the patient and verify their contact information. This person may be the patient themselves, a family member, or someone who handles the patient's affairs. If the contact person is not the patient, be sure there is the necessary documentation on file permitting this person to be involved in the communication regarding the patient's care.

Registration

- Verify, collect, and/or update patient's home address (inclusive of a suite or apartment number if appropriate). Note, "home address" is defined as the place of residence in which the patient will receive services. Confirm that this address is the same as the mailing address, or if there is an alternate guarantor address that should be on file as the responsible party.

- Ask and record if there are any special instructions upon arriving at the home (e.g. where to park? what door to use?)
- Ask if there is a healthcare power of attorney or surrogate and record the responsible individual's name and contact number in the EHR. If applicable, obtain a copy of the document.
- Verify, collect, and/or update the patient's insurance coverage. Be sure to ask about primary and secondary coverages and obtain copies of insurance cards when possible. Insurance coverage can be confusing; therefore, patients, family members, or other responsible parties may not recognize the difference between traditional Medicare and a Medicare Advantage policy. Note, verify coverage using an electronic verification tool or other means available. (e.g., real-time eligibility verification within the EHR, online eligibility verification tool such as OneSource, or a process to verify by phone).
- Verify who should receive calls regarding appointments and communications about medical care (e.g. lab results, medication instructions), and verify their contact name(s) and number(s).
- Review and identify if any additional forms will be necessary to send with the provider to the visit or to be sent to the appropriate representative. Note, it is a requirement to maintain consent for treatment and HIPAA communication choices.

Introduction of Services

Transferring to a home-based primary care program and a different primary care provider can be challenging and overwhelming for many. When establishing a new patient relationship, it's important to explain what kind of services you will provide, when they should contact the office, and how to reach the interdisciplinary care team when necessary.

- Inform the patient/caregiver who the primary care provider and care team will be, as well as how the practice assigns patients, e.g. geographic area, facility location. Introduce all providers and members of the interdisciplinary care team that will play a role in the patient's care and emphasize the practice's team approach.
- Schedule and confirm the date and time of the new patient appointment. Review your practice's process for reminder calls, scheduling windows, and what to expect at the initial visit.
- Consider if it's beneficial or necessary for a family member to be present during the first visit or reached ahead of time to obtain pertinent history or information related to the patient's care.
- Review the following:
  - Office phone number and hours of operation.
  - After-hours support and coverage.
  - Advise the patient/caregiver that they should contact the office for any future needs and/or concerns, (e.g. medication refills, how to receive advice and/or care between scheduled visits, change in condition or in case of illness).
  - How future appointment dates will be arranged or determined.
  - Explain insurance coverage and potential out-of-pocket cost (i.e., the home visit will be billed the same as an office visit - Medicare covers 80%, and the remaining 20% is subject to deductible and coinsurance).

Key Talking Points

- We will be the patient's first point of contact for all care needs, and we can be reached 24/7 at phone number (XXX-XXX-XXXX). Rest assured, we will collaborate with other members of the interdisciplinary care team and appropriate family members so we can provide optimal care.

- We will see the patient for sick visits, manage chronic conditions, refill medication(s), and order any supplies or medical equipment needed.
- We will track the patient's care needs and work to keep the patient healthy and independent for as long as possible.
- We will work to empower the patient, family members and caregivers to understand and help manage the patient's needs.
- Our practice works closely with many community resources and services, and we will ensure that you are connected with them as appropriate.

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HCCIntelligence™ Resource Center

HCCI has developed a number of free resources to help home-based primary care (HBPC) providers and practice staff through our HCCIntelligence™ Resource Center at https://www.hccinstitute.org.

Hotline

Call 630.283.9222 or email Help@HCCInstitute.org 9:00 am–5:00 pm (CST) Monday through Friday

Webinars

Every third Wednesday of the month, HCCI hosts a webinar on topics relevant to HBPC.

Virtual Office Hours

Immediately following the monthly webinar, HCCI hosts Virtual Office Hours where experts address questions on any HBPC topic.

Tools & Tip Sheets

Downloadable tools, tip sheets, sample forms and how-to guides on a variety of HBPC topics.

The John A. Hartford Foundation

HCCIntelligence™ is funded in part by a grant from The John A. Hartford Foundation.