Purpose

This resource is intended for home-based primary care (HBPC) providers and practice staff and defines the requirements for the interactive contact required of clinical staff during the Transitional Care Management (TCM) period and serves as a reference when creating workflows or templates for outreach. This content is aligned with Centers for Medicare & Medicaid Services (CMS) guidelines1, which should be reviewed for full details about TCM. Interactive contact (TCM call) is the required non-face-to-face element of a TCM visit. Contact must be made with the beneficiary and or caregiver/responsible party within two business days of discharge. This may be via telephone, email, or it may be face-to-face and must be done by the provider or licensed clinical staff. This contact must address the patient’s medical needs and status, and go above and beyond just their scheduled follow-up appointment needs. If your first attempt to communicate with the patient is unsuccessful, CMS requires documentation of at least two failed attempts and expects communication attempts to continue until contact is made. However, if at least two documented attempts are recorded in the medical record before the face-to-face TCM visit, the provider can proceed with billing the TCM Evaluation and Management (E/M) CPT code.

Below is a list of required elements the clinical staff must include when documenting the interactive contact:

- The discharge date and date of the TCM call with the patient/caregiver.
- How is the patient handling their transition home? Do they feel their condition is stable enough to be safe at home?
- Review of discharge medications.
- Review of hospital discharge instructions. This could include diagnostic tests or treatments that were recommended and/or scheduled, and any other health care professionals to whom the patient was referred.
- Does the patient or caregiver have any questions regarding discharge instructions or medications?
- Does the patient have all necessary medications, or are refills or new prescriptions needed?
- Does the patient or caregiver require any assistance arranging follow-up doctor visits, testing, therapy, and/or in-home needs?
- Does the patient or caregiver have all the necessary durable medical equipment (DME)? If not, what additional orders are needed?
- Confirm the appointment date on which the provider is scheduled to see the patient for the face-to-face visit.

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.

HCCIntelligence™ is for educational and informational purposes only and should not be relied upon as medical advice.