

Principal Care Management – User Guide

(A system to extend the Care Program Data Model to enable Time Tracking)

Overview

Principal care management is a model for the care of patients with a chronic illness for a period lasting three or more months. According to the CMS definition (via the AACCP), the patient must also have had either a recent hospitalization or an acute risk of death, exacerbation or functional decline, or require management that's "unusually complex due to comorbidities."

Background and Challenges

- CMS recognizes Chronic Care Management (CCM) as a critical primary care service that contributes to better patient health and care for patients with multiple chronic conditions.
- The need for the market is that a lot of revenue is lost on smaller tasks that can be tracked under PCM/CCM. Existing EHRs are not sufficient for tracking these tasks.
- The existing process is manual and often not practical from an ROI point of view due to that manual workflow.
- Our application hopes to make that process efficient and capture that lost revenue.
- Patients can be billed monthly for PCM/CCM after they certain criteria is met for their care:

One for PCM or multiple complex chronic condition for CCM expected to last at least 3 months, and that places the patient at significant risk of hospitalization, acute exacerbation/ decompensation, functional decline, or death, the condition requires development, monitoring, or revision of disease-specific care plan, the condition requires frequent adjustments in the medication regimen and/or the management of the condition is unusually complex due to comorbidities, ongoing communication and care coordination between relevant practitioners furnishing care; first 30 minutes provided personally by a physician or other qualified healthcare professional, per calendar month)

- The specific criteria are slightly different for each CPT code.

Need for this Application in Salesforce

- Enterprise and Unlimited editions of Health Cloud provide a Care Programs model as standard. Our application is built on top of Health Cloud Care Program Management.
- The existing Care Program Management lets us enroll patients in Care Programs and check Care Program eligibility and Goals.
- The existing module also lets us manage Care Program Providers and Products.
- The existing module also lets us track which health care professionals are involved in the care of the patient using Care Program Team Member Object.
- The existing module lacks any Time Tracking functionality for tracking the time spent by healthcare professionals for patient care.
- No time tracking makes it difficult to track when a patient becomes eligible for billing in programs like PCM. We use the Opportunity object to track this.
- No automated Billing based on time spent working on patient, no recurring billing for monthly programs like PCM.

Features of our Application

Our application is built on top of Health Cloud Care Program Management and Provides the following features for managing patients:

- Easy Enrollment of Patients in Care Programs using Custom Flow
- Care Program Management and Consent Form Support
- Activity and Time Tracking for Care program related activities
- Automated Billing Criteria Tracking and management via opportunities.
- Care Program Team assignment support and Tracking.
- Single View for Care Program Management and Billing Overview.
- Analytics, reporting and Dashboarding for the Care Programs.

Managed Package Requirements:

Enterprise or Unlimited Edition of Health Cloud
Care Programs Standard Components

Custom Components in Managed Package:

1. Activity Time Logs Custom Object
2. Program Enrollment – Flow
3. PipelineViewer – Lightning Aur Component
4. CarePogramCopyTeam – Apex Class

5. getPipelines – Apex Class
6. Careprogrampipeline – Apex Class

User Guide: Principal & Chronic Care Management Flow

This user guide outlines the step-by-step process flow for managing care programs, patient enrollment, and attaching tasks/logs to pipelines in the Principal & Chronic Care Management system.

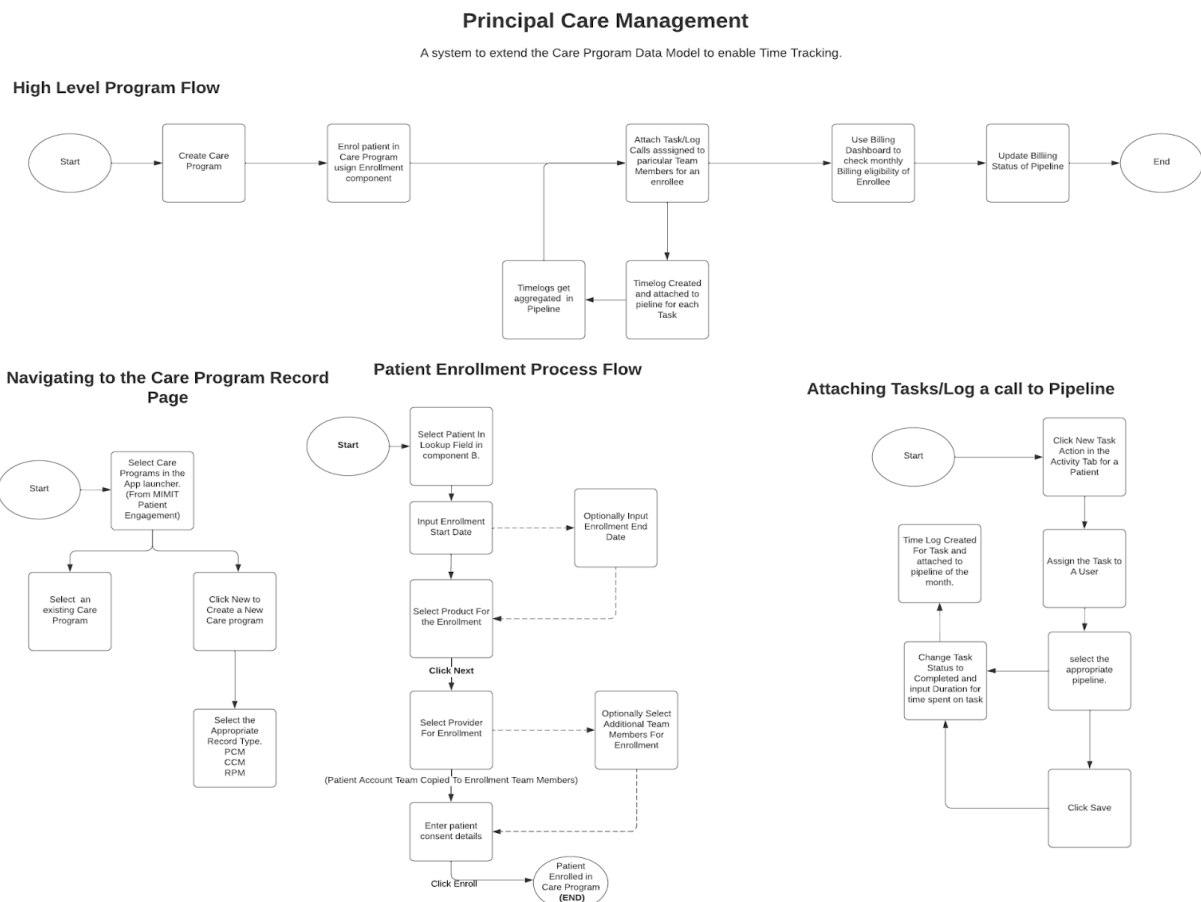


Fig 1: Principal Care Management Process Flow

- ❖ Let's dive deep into it by covering each step-in detail.
We begin with the care program record page and as a background we are using all the standard objects of the Health Cloud.

	Name	Last Modified Date	Last Modified By	Parent Program	Program Sponsor
1	PCM PAD - Principal Care Management for Peripheral arterial disease	2/13/2023 7:23 AM	anan		
2	Siren Socks	12/20/2022 6:33 AM	anan		
3	RxCompli Hypertension- Remote monitor Program	1/13/2023 6:56 AM	anan		RxCompli

Fig 2: Care Program Record Page

- ❖ To create a New Care Program, apart from the standard fields, we have certain custom parameters defined which is the **Threshold Time** (Physician Time Threshold & Non-Physician Time Threshold) that changes depending on the care program and is further used in Billing Dashboard.

New Care Program

Information

Program Sponsor: Search Accounts...

Name: * (required)

Description:

Start Date: * (required)

End Date:

Parent Care Program: Search Care Programs...

Physician Time Threshold:

Non-Physician Time Threshold:

Status: Active

Owner Name: Anand

Buttons: Cancel, Save & New, Save

Fig 3: New Care Program Modal

- ❖ Let's take the Existing Care Program **PCM-Hypertension Remote Monitor Program** to know more. As you can see in Fig 4 it is made up of standard objects and fields mostly, but we have created a few custom components such as Billing Dashboard, Program Enrollment and Care Program Enrollee. Moreover, the Total no. Patients which is in the details section of the care program can be seen in the Care Program Enrollee component.

The screenshot displays the 'PCM-Hypertension Remote monitor Program' interface. It includes a 'Details' section with fields for Program Sponsor (RxCare), Name (PCM-Hypertension Remote monitor Program), Description, Start Date (12/2/2021), End Date (12/31/2022), Physician Time Threshold (30), and Non-Physician Time Threshold (30). The 'Billing Dashboard' section shows a table of patient data with columns for Opportunity Name, Account Name, Month, Year, Stage, Non-Phys., and Physician Time. The 'Program Enrollment' section shows a list of care program enrollments with columns for Account, Status, and Enrollee Name.

Opportunity Name	Account Name	Month	Year	Stage	Non-Phys.	Physician Time
November 2022 - Jayant Doe - PCM Hypertension RPM	Jayant Doe	October	2022	Not Eligible for Billing	0	0
October 12, 2022 - Kaleb Doe - PCM-Hypertension Remote monitor Program	Kaleb Doe	October	2022	Eligible for Billing	1435	0
October 12, 2022 - Jayant Doe - PCM-Hypertension Remote monitor Program	Jayant Doe	October	2022	Eligible for Billing	0	126
October 12, 2022 - Jennifer Doe - PCM-Hypertension Remote monitor Program	Jennifer Doe	October	2022	Eligible for Billing	0	270
September 14, 2022 - William Jones - RxCare Hypertension-Remote monitor Program	William Jones	September	2022	Eligible for Billing	49	25
September 6, 2022 - Maria Katerakos - RxCare Hypertension-Remote monitor Program	Maria Katerakos	September	2022	Eligible for Billing	45	18

Fig 4: PCM-Hypertension Remote Monitor Program

- ❖ Let's move on to the **Program Enrollment Component** to enroll the Patients. Here we fill out the details of the Patient, choose the start date (End Date is Optional), the Available Products and click on **Next**.

Program Enrollment

* Care Program ⓘ
 PCM -Hypertension Remote monitor Program ×

* Patient To be Enrolled ⓘ
 Jonathan Doe ×

* Enrollment Start Date
 Oct 13, 2022 📅

Enrollment End Date
 📅

▼ Product And Services

* Available Products
 Rxcompli Sensor ▾

Next ➡

Fig 5: Program Enrollment

- ❖ After clicking on **Next** we select the provider, add the additional team members along with their roles and click on **Enroll**.

Program Enrollment

* Select Provider
 RxCompli_CIMSS ▾

▼ Additional Team Members

Team Member ⓘ Paramjit Chopra ×	Role Care Coordinator ▾
Team Member ⓘ Search People... 🔍	Role --None-- ▾
Team Member ⓘ Search People... 🔍	Role --None-- ▾

Previous Previous Enroll ➡

Fig 6: Program Enrollment

- ❖ As soon as we **Enroll** the patient from the **Program Enrollment Component** it gets added to the **Care Program Enrollments**.

Care Program Enrollments (3+)	
Jayant Doe - PCM -Hypertension Remote monitor Program	
Account: Jayant Doe	
Status: Active	
EHR Referral Source Contact:	
Jennifer Doe - PCM -Hypertension Remote monitor Program	
Account: Jennifer Doe	
Status: Active	
EHR Referral Source Contact:	
Rxcompli	
Account: John Test Doe	
Status: Active	
EHR Referral Source Contact:	
View All	

Fig 7: Care Program Enrollments

- ❖ Also, it automatically gets added to the Billing Dashboard. The **Stage** Column in the billing dashboard decides whether the Patient Enrolled is eligible for billing or not. **Eligibility** for the billing depends on the **Time Tracking Fields** (Physician Time & Non-Physician Time) next to it.

Billing Dashboard						
Patient Filter		Filter by Month, Year	Filter by Stage			
			Choose an Option...			
Opportunity Name	Account Name	Month, Year	Stage	Non-P...	Physician Ti...	
October 13, 2022 - Jonathan Doe - PCM -Hypertension Remote monitor Program	Jonathan Doe	October 2022	Not Eligible For Billing	0	0	
November 2022 - Jayant Doe - PCM Hypertension RPM	Jayant Doe	October 2022	Not Eligible For Billing	0	0	
October 12, 2022 - Kaibeh Doe - PCM -Hypertension Remote monitor Program	Kaibeh Doe	October 2022	Billed_to_customer	1435	0	
October 12, 2022 - Jayant Doe - PCM -Hypertension Remote monitor Program	Jayant Doe	October 2022	Billed_to_customer	0	126	
October 12, 2022 - Jennifer Doe - PCM -Hypertension Remote monitor Program	Jennifer Doe	October 2022	Billed_to_customer	0	270	
September 14, 2022 - William Jones - RxCompli Hypertension- Remote monitor Program	William Jones	September 2022	Billed_to_customer	49	25	
September 2, 2022 - Malik Valenzuela - RxCompli Hypertension- Remote monitor Program	Malik Valenzuela	September 2022	Eligible for Billing	45	10	
View All						

Fig 8: Billing Dashboard

- ❖ Next up is to create a Time Log which can be done in two ways, one is by clicking on the **Create Time Log** Button which is present on the Top Right Corner on the Record Page as shown in the figure.

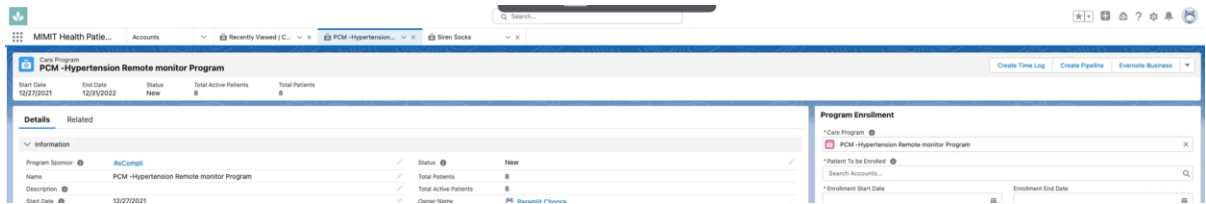


Fig 9: Create Time Log Quick Action Button

- ❖ **Create Time Log** Modal Pops up, here we can fill in the details and add the duration of the time log which will be automatically updated on the billing dashboard pipeline.

The 'Create Time Log' modal form is displayed. It contains the following fields and options:

- Activity Time Log Name:** Jayant Doe Test Task
- Date:** 10/13/2022
- Duration (Mins):** 40
- Type of Activity:** Scheduling Services
- Activity Description:** (Empty text area)
- User:** Paramjit Chopra
- User Role:** Primary Physician
- Care Program Enrollee:** Jonathan Doe - PCM -Hypertension Remote monitor Pro...
- Account:** Search Accounts...
- Contact:** Search Contacts...
- Pipeline:** October 13, 2022 - Jonathan Doe - PCM -Hypertension ...

Buttons for 'Cancel' and 'Save' are located at the bottom right of the modal.

Fig 10: Create Time Log Modal

- ❖ The **Billing Dashboard** Eligibility gets updated automatically when the duration of time logs exceeds the threshold value

Billing Dashboard

Patient Filter:

Filter by Month, Year:

Filter by Stage: Choose an Option...

[Refresh](#)

Opportunity Name	Account Name	Month, Year	Stage	Physi...
October 13, 2022 - Jonathan Doe - PCM -Hypertension Remote monitor Program	Jonathan Doe	October 2022	Eligible for Billing	0 40
November 2022 - Jayant Doe - PCM Hypertension RPM	Jayant Doe	October 2022	Not Eligible For Billing	0 0
October 12, 2022 - Kaibeh Doe - PCM -Hypertension Remote monitor Program	Kaibeh Doe	October 2022	Billed_to_customer	1435 0
October 12, 2022 - Jayant Doe - PCM -Hypertension Remote monitor Program	Jayant Doe	October 2022	Billed_to_customer	0 126
October 12, 2022 - Jennifer Doe - PCM -Hypertension Remote monitor Program	Jennifer Doe	October 2022	Billed_to_customer	0 270
September 14, 2022 - William Jones - RxCompli Hypertension- Remote monitor Program	William Jones	September 2022	Billed_to_customer	49 25
October 8, 2022 - Kaibeh Doe - PCM -Hypertension Remote monitor Program	Kaibeh Doe	October 2022	Eligible for Billing	0 40

[View All](#)

Fig 11: Updated Billing Dashboard

- ❖ Another way to **Track Time** is by creating a Task (This can be Care Coordinator assigning tasks to other people). Here we can fill in the details by choosing appropriate values for the required fields along with Start Date & Time and click on Save.

New Task
Log a Call
New Event
Email

Subject
Review of labs

Comments

Assigned To
Anand

Due Date
10/13/2022

User Role
Primary Physician

Status
Not Started

Related To
PCM -Hypertension Remote monitor Program

Priority
Normal

Care Program Enrollee
Jonathan Doe - PCM -Hypertension Remote monitor Program

Start Date Time
Date
10/13/2022
Time
12:00 PM

Related To Pipeline
October 13, 2022 - Jonathan Doe - PCM -Hypertension R

Completed Date/Time

12:00 AM
12:30 AM
1:00 AM
1:30 AM
2:00 AM
2:30 AM

Save

Fig 12: New Task

Conculsion

This user guide provides a detailed walkthrough of the process flow for managing care programs, patient enrollment, and attaching tasks/logs to pipelines in the Principal & Chronic Care Management system.