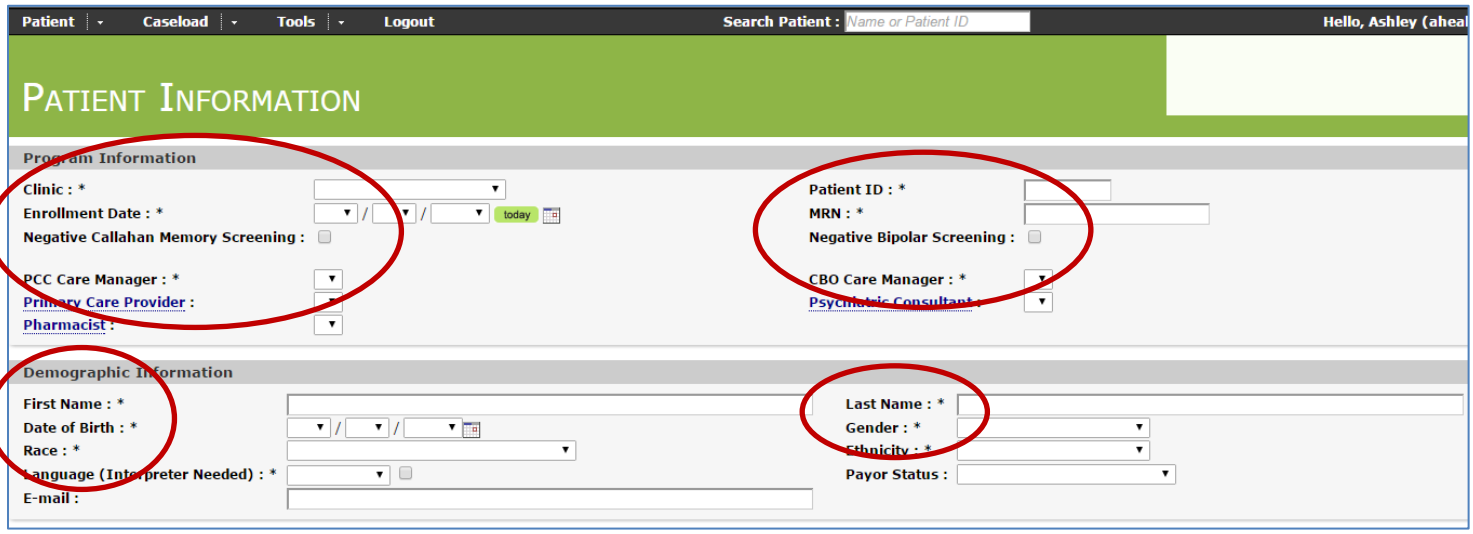
Care Partners CMTS Required Fields

Patient Information Screen (when adding a new patient)

Required fields:

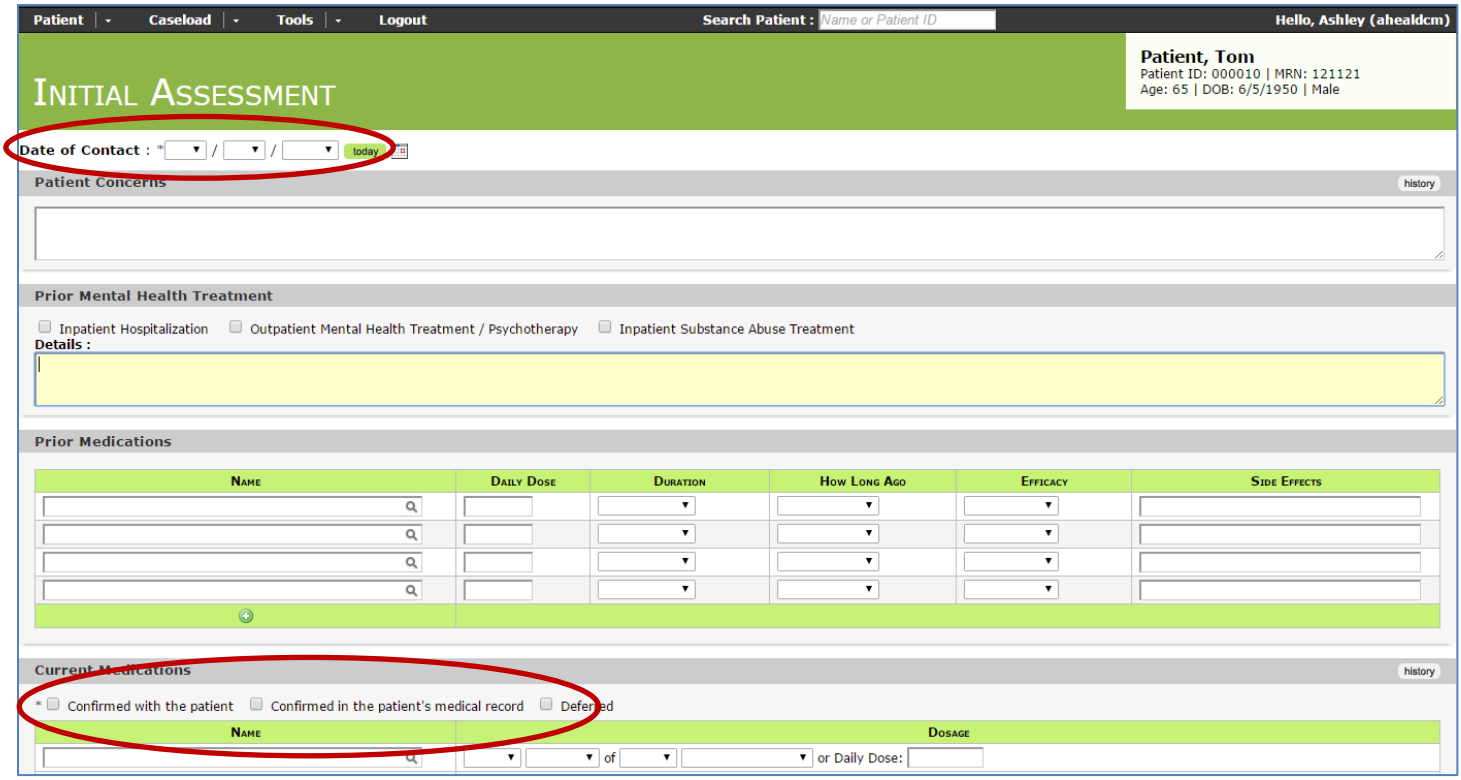
- Program Information
  - Primary care clinic name
  - Enrollment Date
  - Check box for a negative score on the Callahan Six-Item Screener (memory screener)
  - Patient ID - automatically generated by CMTS
  - Medical Record Number (MRN)
  - Check box for a negative score on the bipolar screener of your choice
  - PCC Care Manager name
  - CBO Care Manager name
- Demographic Information
  - First name of patient
  - Last name
  - Date of birth
  - Gender (can choose 'Unknown or not reported')
  - Race (can choose 'Unknown or not reported')
  - Ethnicity (can choose 'Unknown or not reported')
  - Language

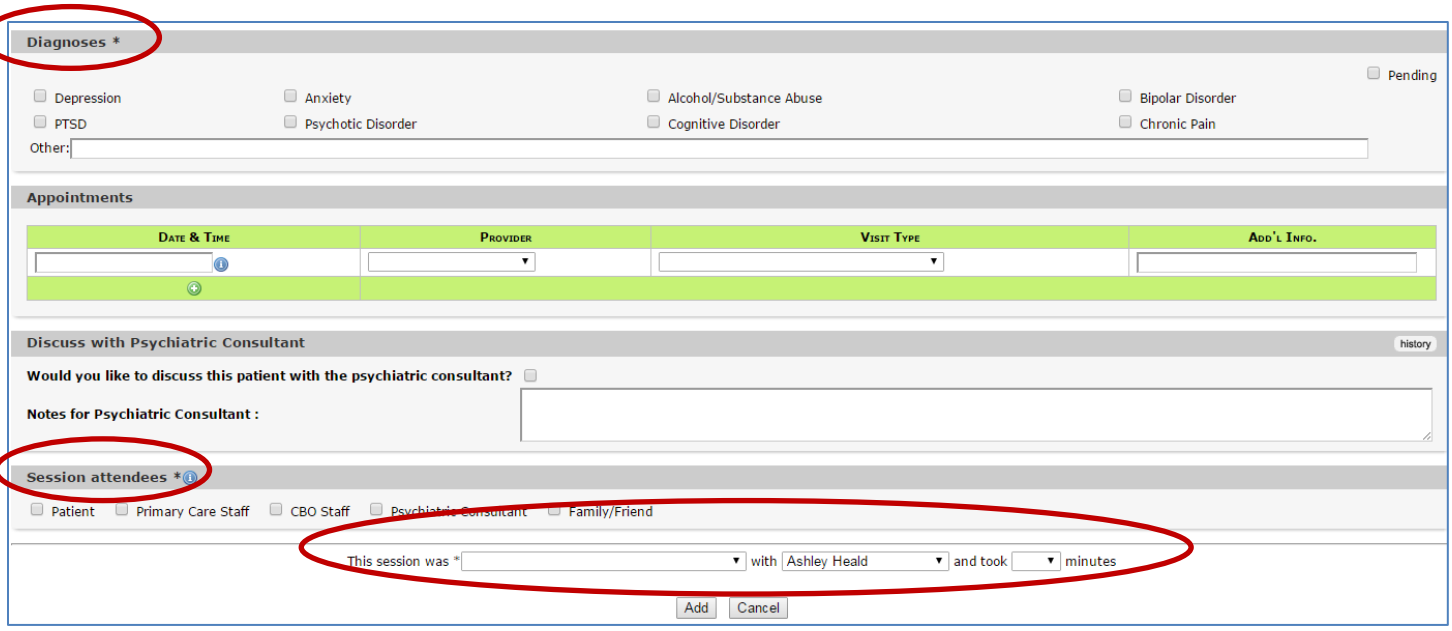


Initial Assessment & Follow Up Contacts

Required fields:

- Date of contact
- Current Medications
    - Confirm with patient that current medications list is up-to-date
- Diagnosis
- Session attendees
- Session location and length of time





Items that are not required in order to close out a note but are necessary for this project

- PHQ-9 scores
    - PHQ-9 is used as both a screener and follow-up measure in Collaborative Care. It is administered regularly over the course of treatment and needs to be entered into CMTS
- Psychiatric Consultation notes:
    - Psychiatric consultants meet with care managers over the phone or in person on a weekly basis for usually an hour to do systematic case reviews of new patients and patients not improving as expected.
    - Recommendations stemming from this consultation are entered into the patient's CMTS record as a Psychiatric Consultation Note
- Family members / Friends of patients
    - For those sites involving friends or family in Collaborative Care, information such as name, relationship, and contact information needs to be entered into CMTS in the Patient Information page
- Care Plans
    - This will help you document the current care plan and care plan goals for the patient, as well as changes in treatment. About half of patients will need some sort of change in treatment over the course of their care and this CMTS function will help you track and manage that.