

**Primary Care-Specialty Care Collaborative Guidelines
Level 1 Medical Neighbor**

Transition of Care

Mutual Agreement

Maintain accurate and up-to-date clinical record.

Expectations

Primary Care	Specialty Care
<input type="checkbox"/> Transfers information as outlined in Patient Transition Record. <input type="checkbox"/> Provides patient with specialist contact information	<input type="checkbox"/> Provide single source contact person to coordinate services with specialist or primary care practice. <input type="checkbox"/> When PCP uncertain of appropriate laboratory or imaging diagnostics, assist PCP prior to the appointment regarding appropriate pre-referral work-up

Access

Mutual Agreement

Be readily available for urgent help to both the physician and patient via phone.
 Be prepared to respond to urgencies.
 Provide alternate back-up when unavailable for urgent matters.

Expectations

Primary Care	Specialty Care
<input type="checkbox"/> Determines reasonable time frame for specialist appointment.	<input type="checkbox"/> Have timely consultation appointments available to meet patient and referral source requests. Discuss special arrangements, as needed.

Collaborative Care Management

Mutual Agreement

Define responsibilities between PCP, specialist and patient.
 Clarify who is responsible for specific elements of care (drug therapy, referral management, diagnostic testing, care teams, patient calls, patient education, monitoring, follow-up).
 Give and accept respectful feedback when expectations, guidelines or standard of care are not met

Expectations

Primary Care	Specialty Care
<input type="checkbox"/> Suggests type of transition of care <input type="checkbox"/> Resumes care of patient when patient returns from specialist care and acts on care plan developed by specialist.	<input type="checkbox"/> Reviews information sent by PCP <input type="checkbox"/> Sends timely reports to PCP to include a care plan, follow-up and test results as outlined in Specialist Transition Record.

Patient Communication

Mutual Agreement

Consider patient/family choices in care management, diagnostic testing and treatment plan.
 Provide to and obtain informed consent from patient according to community standards.

Expectations

Primary Care	Specialty Care
<input type="checkbox"/> Explains specialist results and treatment plan to patient, as necessary. <input type="checkbox"/> Identifies whom the patient wishes to be included in their care team.	<input type="checkbox"/> Informs patient of diagnosis, prognosis and follow-up recommendations. <input type="checkbox"/> Recommends appropriate follow-up with specialist and PCP.