

mCOA's Patient-Centered Medical Home
Record Review Worksheet

Please read the Workbook Instructions and fill
IMPORTANT NOTE: Read the instructions to d

Organization Name:
Worksheet Completion Date:

Patient Number	3D - Medication Management						4A - Support Self-Care Process					
	1	2	3	4	5	6	1	2	3	4	5	6
Clinically Important Condition	Reviews and reconciles medications with patient/families	Assesses patient understanding of medications for patients with date of assessment	Provides information about new prescriptions to patient/families	Assesses patient response to medications and barriers to adherence for patients with date of assessment	Documents over-the-counter medications, herbal therapies and supplements for patient/families, with the date of updates	Provides educational resources or refers patient/families to educational resources to assist in self-management	Uses an EHR to identify patient-specific education resources and provide them to patients, if appropriate	Develops and documents self-management plans and goals in collaboration with patient/families	Documents self-management abilities for patient/families	Provides self-management tools to record self-care results for patient/families	Counsels patient/families to adopt healthy behaviors	
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Count of Patients Met (Yes + NA)	0	0	0	0	0	0	0	0	0	0	0	0
Count of Patients Not Met (No + Not Used)	0	0	0	0	0	0	0	0	0	0	0	0
Total Count of Patients (Met + Not Met)	0	0	0	0	0	0	0	0	0	0	0	0
% of Patient that Meet Factor Criteria	0	0	0	0	0	0	0	0	0	0	0	0
Result for Input into IS:	0	0	0	0	0	0	0	0	0	0	0	0
	48 Patients	48 Patients	48 Patients	48 Patients	48 Patients	48 Patients	48 Patients	48 Patients	48 Patients	48 Patients	48 Patients	48 Patients

Please read the Workbook Instructions and fill out the Patient Conditions Worksheet before completing this worksheet.

IMPORTANT NOTE: Read the instructions to determine if your practice can select the "not used" option available in the drop-down boxes for Patient Number 1.

Organization Name: _____
 Worksheet Completion Date: _____

Patient Number &	Clinically Important Condition	3C - Care Management						
		1 Conducts pre-visit preparations	2 Collaborates with patient/family to develop individual care plan, including treatment goals reviewed and updated at each relevant visit	3 Gives the patient/family a written plan of care	4 Assesses and addresses barriers when the patient has not met treatment goals	5 Gives the patient/family a clinical summary at each relevant visit	6 Identifies patient/families who might benefit from additional care management support	7 Follows up with patient/families who have not kept important appointments
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Count of Patients Met (Yes + NA) 0 0 0 0 0 0 0

Total Count of Patients (Met + Not Met) 0 0 0 0 0 0 0

% of Patients that Meet Practice Criteria 0 0 0 0 0 0 0

Benefit for Dependent < 43 Patients < 43 Patients < 43 Patients < 43 Patients < 43 Patients < 43 Patients