

# Firm Faculty Coaching Topic PGY2 #4

## Managing Legatee Patients and using AMB PCG ORDERS

1. Have resident go back to High Risk Legatee sign-out. Review patients in EPIC. Has patient met the new resident PCP? If not have the resident call to check in and document in Telephone Note. Ambulatory APD has lists if needed. (a)
2. Have the residents review pending labs/studies. Were tests done? Have patients been scheduled to see new PCP? If not, send message to pcgorders to get patients scheduled.(b)
3. Review refills for legatee patients. If legatee patient has seen any resident in the last year, ok to give 3 month supply with one year refills, unless controlled medication. When refilling, send message to pcgorders to schedule patient an appt with new PCP. (c-d)

4. Review Legatee paperwork. Fine to sign paperwork. Cross out old PCP name and add new PCP name and NPI. Use NPI lookup website if needed <https://npiregistry.cms.hhs.gov/>
5. Forward any questions to Firm Faculty coach. (i.e Dr. X, I am not sure what to do about this lorazepam refill since I have not met the patient yet. Can you help?)

Resident Clinic Legatee Signout June 2020			
Resident handing off:			
Permanent / Future email address:			
Resident assuming care:			
HIGH RISK PATIENTS			
Last name	First name	MRN	Why high-risk & other comments
PENDING LABS/STUDIES THAT NEED FOLLOW-UP			
Last name	First name	MRN	Date ordered/scheduled

a. Review high risk patients

b. Review pending labs/studies

c. Start a new staff message or route any open encounter

d. Enter subject and patient name, click on magnifying glass to search for AMB\_pcg\_orders in recipients

Staff Message

Care Team

Enter recipients

Schedule patient appointment

CBISTEST, AMBULATORYIII [2861581]

Current Patient

This message will not be permanently saved to the patient's chart.

PCGorders.

Please schedule this patient an appointment to see me as new PCP in the next few months.

Julie L Oyler, M.D.

In Basket Recipients

Individual Recipients

Search Results

% Registry Name

Registry ID

Pools

amb\_pcg

Classes

AMB\_PCG\_ORDERS

220001

+ Add To

+ Add 'Cc'

To Recipients

P AMB\_PCG\_ORDERS 220001

Cc Recipients

Remove 'To'

Remove 'Cc'

Restore

Accept

Cancel

Save as QuickAction

Send

Cancel

d. Under pool, search for AMB\_pcg\_orders

f. Click "Add To" and "Accept"

g. Write a note to PCGorders asking to schedule patient and "Send"