

**MEDICAL PRACTICE CHECKLIST FOR IMPLEMENTING NCCARE360**

**BASIC STEPS FOR IMPLEMENTATION**

1. Set up a team to meet regularly about the implementation and address operational issues that arise.
2. Initial team reviews NCCARE360 [website](#) and Resources.
3. Register one person per practice site in NCCARE360 using this [form](#).
  - » Medical practices are considered “physical health” providers in the NCCARE360 platform.
4. Initial team completes NCCARE360 training available at [uniteus.com/training-materials-4](#). Password is **uniteuspartner**.
5. Complete and sign Business Associates Agreement and Participation Agreement. These forms will be sent by Unite Us when registration form has been received.
6. Within 5-10 business days of completing registration and training, you will receive an email with information on how to log in and create a password for your NCCARE360 portal. Complete the process.
7. Review the portal and write down any questions you have.
8. Schedule training or meeting with NCCARE360 Community Engagement Manager, if needed, for advanced training and/or questions.
9. Address Operational considerations listed below
10. All practice users complete NCCARE360 training and any practice-specific training, such as EHR documentation and workflows
11. Start referring your patients!
  - \*\* Begin with a pilot group to implement use of NCCARE360, learn, adapt, and then spread to others.

For assistance, contact NCCARE360: [connect@nccare360.com](mailto:connect@nccare360.com)

**PRACTICE OPERATION CONSIDERATIONS**

- Identify initial users of NCCARE360 in your practice (who is going to test it?).**
- Develop a script and other marketing materials for educating patients about NCCARE360.**
- Set up EHR documentation workflow. ICD10 codes can be used but EHR needs to be updated with current codes.**
- Develop clear guidelines and workflow for making referrals:**
  - Determine how you will learn of referral needs from your patients- e.g., screening, conversation. See below for implementation of screening questions.
  - What to enter into the general information field when making a referral, e.g., to ensure privacy standards are met.
  - Which documents to upload to NCCARE360 when making a referral.
  - Standards for follow up and documentation of status of referral.
- Develop clear guidelines and workflow for receiving referrals:**
  - Determine how to obtain consent from patient and understand the various options offered in NCCARE360.
  - What to document in the “case notes” section, e.g., to facilitate team communication and ensure privacy standards are met.
  - Meeting NCCARE360 service standards when responding to referrals.
  - Standards for action steps of: “hold for review”, “reject”, “send”, and “accept.”
- Standards for follow up and documentation of case status: “open”, “closed”, “resolved”, “unresolved”.**
- Training for staff and providers**
  - Patient Centered Care
  - Trauma Informed Care
  - Cultural Competency
  - Clinical and EHR Workflow

## PRACTICE CHECKLIST FOR IMPLEMENTING SOCIAL DETERMINANTS OF HEALTH ASSESSMENT IN YOUR CLINIC

- Assess Current state in your practice**
  - What opportunities are you already asking about?
  - Identify gaps between what you are asking and what you need/want to be asking.
- Choose validated screening assessments or questions; this list is not exhaustive-you can choose what is best for your practice and community.**
  - [Protocol for Responding to and Assessing Patients' Assets, Risks, and Experiences \(PRAPARE\)](#)
  - [The EveryONE Project \(AAFP SDOH Screening Tool\)](#)
  - [Accountable Health Communities Health Related Social Needs Screening Tool \(CMS\)](#)
  - [HealthLeads Social Needs Assessment \(must enter information to get toolkit\)](#)
  - [NC Medicaid SDOH screening tool](#)
- Create or obtain a list of resources available in your region/ area/community for the opportunities you've chosen.**
  - » Should have hard copy and electronic option, such as NCCARE360, 2-1-1, brochures, and binder
- Identify clinical workflow-who, whom, how, when, where**
  - » Consider creating a workflow or process map
- Build EHR documentation-template, automatic wording, etc.**
  - » Ensure it is HIPAA compliant!
- Train staff and providers**
  - Patient Centered Care
  - Trauma Informed Care
  - Cultural Competency
  - Clinical Workflow
  - EHR Workflow
- Pilot your workflow using a [PDSA](#)**
- Spread across your practice**
- Monitor data for sustainability, population based care, and value based care.**



# NCCARE360