

# Care Management Readiness Checklist for Physician Practices

Efficient, compliant programs for Chronic Care Management (CCM), Remote Patient Monitoring (RPM), and related services can unlock new reimbursement, improve outcomes, and strengthen patient loyalty. Use this quick-scan checklist to confirm you have the right foundations in place before you launch or outsource care management.

## Clinical Workflow

- Documented Care Plans - Care plans are maintained in the EMR, updated by clinical staff, and overseen by the billing practitioner/clinical leadership. Plans can be shared with patients or caregivers when appropriate.
- Defined Staff Roles & Oversight - Care-management responsibilities are clearly defined by role, and monitoring workflows follow appropriate supervision, escalation, and documentation standards for the applicable program.
- Single-Provider Billing Safeguards - Process exists to confirm no other provider is billing CCM for the same patient in the same month (common pitfall for multi-specialty panels).

## Technology & Integration

- EMR Integration - Integration supports efficient documentation and data exchange with your EMR to reduce double documentation and streamline clinical workflows.
- Minimal-Click Workflow - User interface requires only a few steps for physicians, reducing resistance and increasing adoption.
- Device & App Reliability - Cellular or Bluetooth devices are tested to prevent dark devices, OS update failures, and downstream tech-support burden.

## Billing & Compliance

- Current CMS Code & Policy Alignment - Correct use of CMS codes per the latest CMS and payer guidance, reviewed periodically as requirements evolve.
- Time & Data Capture Automation - Platform automatically logs minutes and verifies device-transmitted readings (timestamps, completeness, and patient association) to support audit-ready documentation.
- Audit Trail & HIPAA-Aligned Controls - Patient communications and device data are protected through role-based access, secure PHI handling, and documented audit trails supported by BAAs where applicable.

## **Patient Engagement**

- Onboarding & Education Plan - Patients receive simple instructions and coaching that improve adherence beyond mere device distribution.
- Multichannel Communication (with appropriate consent) - Care team can reach patients via phone, SMS, and secure patient-portal messaging to sustain enrollment and collect survey data.

## **Helpful Resources**

- CMS guidance and billing policies - Reference CMS and payer policies for CCM/RPM requirements and coverage rules.
- LOGIC Integration Guide - Step-by-step EMR connectivity checklist (internal).
- LOGIC Compliance & Security Overview - Operational controls, audit-ready evidence packages, and governance approach.

## **What to Do Next**

- Share the checklist with your care team and mark any gaps.
- Prioritize fixes in workflow, tech, billing, or engagement.
- Schedule a Readiness Consultation with LOGIC. We'll review your current state, quantify revenue potential, and map a go-live plan - no obligation.

*This checklist is an educational aid and not legal or billing advice. Confirm all coding and coverage with your MAC and payer policies.*