

Primary Care Co-Visit: Care Coordinators Tip Sheet

In the Disability-Competent Care (DCC) model, care coordinators are responsible for supporting the participant's health and well-being by supporting and supervising the participant's care based on their goals and preferences.¹ Successful care coordination involves frequently assessing the participant's medical and psychosocial conditions, maintaining a relationship based on trust with the participant, and including the participant's perspective in care planning.

During primary care co-visits, the care coordinator attends the primary care provider (PCP) visit with the participant and provides support before, during, and after the visit. Co-visits are one approach to help reduce health disparities for participants with disabilities through improved care coordination. This document provides tips for health plans, health systems, and provider groups in preparing care coordinators for their expanded role working with participants and PCPs.

Successful Co-Visits

Obtaining the participant's permission prior to the co-visit is paramount to successful care coordination. It is always the participant's decision whether to have someone else present at their appointment (e.g., a care coordinator, family member, or care partner). When engaging with a participant to introduce the co-visit approach, it is vital to communicate the value of including the care coordinator in an appointment with the PCP. Having the care coordinator present can help to increase collaboration and communication between the participant and PCP and better support the participant and their care goals.

In addition to explaining the purpose of the co-visit to the participant, the care coordinator should take time to explain how they will work with the participant to prepare for the visit, what will happen during the visit, and how they will support them during and following the visit. Once the participant has agreed to the co-visit approach, the care coordinator should inform the PCP of the participant's request for the care coordinator to be present during the visit and provide additional information about the co-visit approach to the PCP. For a complete list of care coordinator responsibilities, see the **Care Coordinator Checklist for Co-Visits** below.

Prior to the co-visit, the care coordinator should share the **Pre-Appointment Concerns Template** (see below) with the participant and help them complete it. This template encourages the participant to think about their goals in advance of the PCP visit and prioritize their concerns.

During the visit, it is important to remember that the care coordinator is in a supporting role to the participant; therefore, the participant should take the lead. Having the **Pre-Appointment Concerns Template** in hand may be of assistance. All parties should discuss and understand decisions made during the appointment and any items that may require follow-up. The care coordinator should document all decisions and important information discussed.

¹ For more information about the DCC model, visit the Resources for Integrated Care website at <https://www.resourcesforintegratedcare.com/concepts/disability-competent-care>.

The Medicare-Medicaid Coordination Office (MMCO) in the Centers for Medicare & Medicaid Services (CMS) seeks to ensure that beneficiaries enrolled in both Medicare and Medicaid have access to seamless, high-quality health care that includes the full range of covered services in both programs. This resource is intended to support health plans and providers in integrating and coordinating care for Medicare-Medicaid enrollees. It does not convey current or anticipated health plan or provider requirements. For additional information, please go to <https://www.resourcesforintegratedcare.com/>.

Care Coordinator Checklist for Co-Visits

Making the appointment:

- Confirm accommodation requirements (e.g., interpreters, accessible exam table, larger exam room to accommodate a wheelchair, longer appointment to accommodate difficulty with communication, etc.)
- Send participant's pertinent medical and background information to the primary care provider (PCP)

Before the visit:

- Gather the questions or issues to be discussed during the visit (refer to **Pre-Appointment Concerns Template**)
- Identify symptoms, when they presented, and other relevant information through discussion with the participant
- Compile a list of medications the participant is currently taking
- Inform the PCP of the participant's request for the care coordinator to be present during the visit, and provide additional information about the co-visit approach to the PCP, as needed
- Confirm the appointment details with the participant (e.g., date, time, address, how the participant plans to get to the appointment, and where to meet the participant)
- Prepare the participant to state their main concerns first during the appointment

During the visit:

- Respect participant's desire for privacy and step out of the exam room when requested
- Help the participant describe their symptoms, clarifying if needed
- Help the participant ask questions
- Discuss recommendations with the participant and PCP
- Document information discussed, instructions received from the PCP, decisions made, and recommended follow-up, for the participant's reference

At the end of the visit:

- Ask how test results, if applicable, will be shared with the participant
- Discuss signs and symptoms requiring immediate follow-up and ensure the participant understands
- Identify need for a return visit, and if so, when
- Ask the PCP for any additional instructions

Following the visit:

- Review your notes with the participant
- Check for any new prescriptions, and help the participant obtain them, as needed
- Make note of the visit in the electronic health record (EHR) or designated health record
- Remind participant to update their calendar with follow-up appointments, as needed

Pre-Appointment Concerns Template

Participant name: _____

Primary care provider name: _____

Clinic name: _____

Clinic address: _____

Date and time of appointment: _____

Care coordinator: _____

Items to bring to your appointment:

- Insurance card
- Picture ID (if available)
- Medications, or a list of medications
- List of your concerns (see below)

A brief summary of what your provider should know about you (e.g., disabilities, medical conditions, mental health history):

List the concerns that you would like to talk about during your appointment, and prioritize them. An action plan will be discussed during the appointment.

| Concern | Priority | Action Plan |
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