Enterprise Care Management | Longitudinal Care Transition Template

DEMOGRAPHICS

Patient Name	
Med Record	
Date of Birth	
Gender	
Decision-maker	☐ Patient ☐ Other: _____

Primary Care Physician (PCP)	
Longitudinal Care Manager (LCM)	
LCM Location	
☐ Acute Care | ☐ AMB Care | ☐ Payer | ☐ ACO ☐ Community | ☐ Home Health | ☐ SNF | ☐ Other	
Health Risk Status	☐ 2 | ☐ 3 | ☐ 4 | ☐ 5

CONTACT INFORMATION

PCP	
LCM	
Pharmacy	
Patient	
Other	

Diagnosis

_____
_____
_____
_____
_____
_____

Medication

Reconciliation	Medication	Adherence
☐		☐
☐		☐
☐		☐
☐		☐
☐		☐

Transition History

Network	Care Setting	Case Manager	Date
IN☐ OUT☐	Acute Care:		
IN☐ OUT☐	ED:		
IN☐ OUT☐	Home Health:		
IN☐ OUT☐	SNF:		
IN☐ OUT☐	Community:		

Social Determinants Resource Needs

☐ Literacy: _____
☐ Food Insecurity: _____
☐ Housing: _____
☐ Transportation: _____
☐ Finances: _____
☐ Patient Engagement Level ☐ 1 \| ☐ 2 \| ☐ 3 \| ☐ 4

Health Goals

_____
_____
_____
_____
_____

Action Plan

_____
_____
_____
_____
_____

Date of Transition

Date:___/____/____
Date:___/____/____
Date:___/____/____
Date:___/____/____
Date:___/____/____

Date of Communication

Name:_____ Date:___/___/___
Name:_____ Date:___/___/___
Name:_____ Date:___/___/___
Name:_____ Date:___/___/___
Name:_____ Date:___/___/___

acma
AMERICAN CASE MANAGEMENT ASSOCIATION