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Procedure Title:	Transitional Care Management (TCM): 2-Day Post-Discharge Contact & Documentation
Date:	12/09/25
Version:	1.1
Department:	Medical Assistants
Approved By:	Melissa Carrigan

1. Purpose of Procedure

This SOP defines the workflow for Medical Assistants (MAs) when a patient has been discharged from an inpatient setting. CMS requires successful two-way communication with the patient or caregiver within 2 business days of discharge for Transitional Care Management (TCM) services to be billable.

2. Scope

This SOP applies to all MA staff responsible for coordinating post-discharge communication for patients transitioning from inpatient hospital stays, skilled nursing facilities, or observation care requiring TCM follow-up.

3. Responsibilities

Medical Assistants are responsible for:

- Monitoring all incoming discharge notifications.
- Initiating patient outreach within 2 business days of discharge.
- Completing required communication elements.
- Documenting communication using the approved Athena Text Macro.
- Creating and routing a patient case to the patient's provider, if requested by the provider.

4. Procedure

4.1 Receipt of Discharge Notification

Upon receiving a discharge notice, the MA must verify the patient's identity, confirm the discharge date, and create a patient case titled: 'TCM Outreach – [Discharge Date]'.

4.2 Completing the Required 2-Day Outreach

The MA must successfully contact the patient or caregiver within 2 business days of discharge. Acceptable methods include phone calls, telehealth communication, or in-person contact. Voicemail or one-way messaging does not meet TCM requirements.

4.3 Components of the TCM Outreach Call

- Verify identity using two identifiers.

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- Confirm discharge date and facility.
- Review hospitalization reason.
- Assess current symptoms.
- Perform medication reconciliation.
- Confirm discharge instruction understanding.
- Schedule or confirm follow-up visit.
- Address all patient questions or concerns.

5. Documentation Requirements

The following Athena Text Macro must be inserted into the patient case after successful TCM contact:

To insert the text macro, simply type, .TCM and the below will populate:

*Patient successfully contacted within 2 business days of discharge per TCM guidelines. Identity verified using two identifiers. Reviewed discharge date, reason for hospitalization, and current symptoms. Patient reports: (**improving|stable|worsening|no concerns).** Completed medication reconciliation and confirmed understanding of discharge instructions. Follow-up visit has been scheduled/confirmed. Patient advised to contact the clinic with any concerns.*

6. If Patient Is Not Reached

If the patient cannot be reached after reasonable attempts, the MA must document attempts and note that TCM requirements were not met. The encounter will default to a standard E/M service at the follow-up visit.

7. Compliance Notes

- Contact must be completed within 2 business days to meet CMS TCM billing rules.
- Two-way communication is required; voicemail alone does not qualify.
- Documentation must be complete and routed to the provider promptly.
    - No need to route to the provider unless the provider has specifically requested this. If the provider does not want the case routed, please mark as complete and close the case.