

Transitional Care Management Documentation Checklist

Use to verify documentation supports the use of these new codes – this checklist is not maintained as part of the medical record.

Patient Name _____ Date of Discharge _____

- Phone call or personal visit within 2 business days
 - Face-to-face office visit date _____
 - Within 7 calendar days, 99496 high complexity of medical decision making (Post TCM01 on this date)
 - Within 14 calendar days, 99495 moderate complexity of medical decision making (Post TCM01 on this date)
 - Review of discharge summary documented
 - Reconciliation of medications documented
 - Review need for or follow-up on pending diagnostic tests and treatments
 - Referrals made to providers of care and community resources documented
 - Patient and/or family education to support self-management, independent living and activities of daily living documented
 - Transitional Care Management Code 99495 or 99496 billed 30th day after discharge
- Date to bill _____

It is expected that the non-face-to-face services listed will be routinely provided as part of transitional care management unless the practitioner's reasonable assessment of the patient indicates that a particular service is not medically indicated or needed. If not performed because not medically necessary, please document why.