



**North Carolina Department of Health and Human Services  
Tailored Care Management  
Care Management Data System Guidance**

Effective, integrated and well-coordinated care management depends on care team members having the ability to efficiently exchange timely and actionable member health information and use that information to monitor and respond to medical and nonmedical events that could impact a member's well-being. The success of Tailored Care Management will depend on Behavioral Health and Intellectual/Developmental Disability (I/DD) Tailored Plans, Advanced Medical Home Plus (AMH+) practices, and Care Management Agencies (CMAs) having the technological capabilities to collect, use and share data in support of an integrated and coordinated approach to care.

### **Care Management Data System Requirements**

AMH+ practices, CMAs, and other organizations providing Tailored Care Management will be expected to have care management platforms – or “data systems” – that allow care managers to understand who their assigned populations are, document and monitor member care needs, and respond as those needs change. Care management data systems should be tools that **allow AMH+ practices and CMAs** to:

- Maintain up-to-date records of assigned members, the care managers those members are assigned to, and their interactions;
- Consume and store patient data;
- Perform analyses on data to share patient health needs, potential indicators of changing needs (e.g., new visits with specialists, new medications) and potential care gaps (e.g., missed appointments, flagging outdated assessments or care plans, gaps in medication adherence);
- Maintain care management documentation (e.g., assessments, care plans, care manager interaction notes);
- Reporting on care management performance, both internally (e.g. supervisor reporting) and externally (e.g., encounter data with Behavioral Health and I/DD Tailored Plans, quality reporting with Behavioral Health and I/DD Tailored Plans).
- Transmitting a practice's care management data to another selected system, if needed; and
- Provide access to - and electronically share, if requested - member records (e.g., assessments, care plans, summary of care documentation) with the member's care team to support coordinated care management, as well as the member.<sup>1</sup>

Care management data systems may be part of – or separate from – an organization's Electronic Health Record (EHR) or clinical system of record, or other analytic and reporting tools. However, the most effective care management data systems will be integrated with an organization's EHR or clinical system of record to support responsive and informed care delivery; they may also link to Admission, Discharge, and Transfer (ADT) data sources to help care managers centrally track unexpected service needs.

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<sup>1</sup> Access and sharing should be in accordance with federal, state, and Department privacy, security, confidentiality, protection, and data-sharing requirements.



Care Management Data System Options

There are several pathways by which AMH+ practices and CMAs may satisfy the care management data system requirement:

<p><b>1 Enhance existing care management data system</b></p>	<p><b>2 License a care management data system</b></p>	
<p>AMH+ practices and CMAs that have care management data systems in-place that meet most Tailored Care Management requirements may consider enhancing their existing care management data systems to support TCM delivery.</p>	<p><b>From a Clinically Integrated Network (CIN) or Other Partner</b></p>	<p><b>From a Behavioral Health I/DD Tailored Plan (BH I/DD TPs)</b></p>
	<p>AMH+ practices and CMAs that serve one or more Behavioral Health I/DD Tailored Plan regions and do not have a care management data system that meets Tailored Care Management requirements may choose to license a common care management data system from a CIN/Other Partner.</p>	<p>AMH+ practices and CMAs that serve a single region and that do not have a care management data system that meets Tailored Care Management requirements may choose to license a care management data system from a BH I/DD TP; practices that serve multiple regions may contract with multiple BH I/DD TPs and use their respective systems.</p>

Resources

Additional detail on TCM health information technology and data use requirements may be found in the following documents:

- North Carolina’s “Tailored Care Management Provider Manual,” available at: <https://files.nc.gov/ncdma/Tailored-Care-Management-Provider-Manual20201202.pdf>
- North Carolina’s “Tailored Care Management Data Strategy: Questions and Answers,” available at: <https://medicaid.ncdhhs.gov/documents/tailored-care-management-data-strategy-questions-and-answers>