

Controlled Substance Contract Appointment Guide

□ Huddle:

- **Notify Family Stress** if you anticipate patient will want to complete the Individualized Treatment Plan today.
- **Check PMP** prior to initiating an agreement and at every refill.
- Determine **which screening tools** are necessary.
 - **For chronic pain:** PEG and PHQ9 during rooming. Opioid Risk Tool (ORT) with provider.
 - **Not for chronic pain,** provider decides PHQ2 or PHQ9. PEG and ORT not required.
- **Check CMS due date.**
 - Complete CMS upon initiating agreement, Q3M for first year, and at least Q6M thereafter.

□ Rooming nurse: Give patient appropriate screening tools (per huddle). Remove PEG and ORT if unnecessary.

□ Provider:

1. Score and review screening tools. If ORT appropriate, continue to step 2.
2. Review and sign Controlled Substance Agreement and Notice of Risk.
3. Use dotphrases for note and problem list documentation
4. Patient needs appt with behavioral medicine provider for non-pharmacological treatment plan. 3 options:
 - Meet with a Family Stress representative now if available (page 1529)
 - Provide FS representative with PHQ-9 score and a brief summary of patient
 - At check-out, request a “Behavioral Health” visit for a later date within 3 months.
 - Attend one of the monthly group visits for pain or anxiety within 3 months.
6. Place MRN stickers on each page of agreement and have 2 copies made. Give original to your team’s nurse. Give one copy to the patient and place the other copy for EMR Scanning.
8. Prescribe a maximum of 3 months of medication.
9. If ordering Contract Medication Screen, include **.udsquestions** in the note.
10. Complete LOS/Follow-up of EPIC:
 - Please schedule visits every 3 months for “F/U controlled substance agreement”
 - Include Family Stress needs if applicable:
 - “Please schedule BH Visit for ITP” vs. “Please give schedule for FSC Pain Management Group”

□ Epic dotphrases:

- **Note:**
 - **.painvisitfemale** or **.painvisitmale**
 - **.udsquestions**
- **Problem list:**
 - **.controlledmedoverview**