

CARE TEAM AND WORKFORCE GUIDE

RESOURCE 1: CORE AND EXPANDED CARE TEAM FUNCTIONS, TEAM MEMBERS AND ROLES

This tool provides an overview of the functions that high-performing primary care practices deliver reliably¹ and proposes a potential array and FTE of team members to do so. Different teams will adjust these roles and FTE to fit their context.

Collaborating Care Team Member	Primary Responsibilities	Recommended Ratio*
CORE CARE TEAM		
Day-to-Day, Organized, Evidence-Based Care		
Primary Care Provider (PCP)	Provides direct patient care, including diagnoses and treatment.	One FTE per panel
Medical Assistant (MA)	Assists the PCP with direct patient care and is responsible for patient flow on the day of a visit, including pre-visit planning and visit/room preparation.	One FTE per panel
Social Health Support/ Community Health Worker (CHW)	Helps identify and connect patients to social health services.	0.5 FTE per panel
Behavioral Health Specialist	Provides day-to-day support for care team and patients with behavioral health needs.	0.5 FTE per panel

Collaborating Care Team Member	Primary Responsibilities	Recommended Ratio*
EXPANDED CARE TEAM		
Population Health Management		
Panel Manager/ Data Analyst	Management of panels including panel sizing, opening/closing of panels, and creating gap reports.	One FTE shared across approximately 10 panels
Population Health Specialist	Uses care gap reports to conduct proactive outreach to patients and schedule for needed follow-up.	One FTE shared across approximately 10 panels
Quality Improvement		
Quality Improvement Lead	Monitors performance measures and works with the care team to improve the quality of patient care.	0.3 FTE shared across approximately 10 panels
Quality Data Analyst	Creates reports and tracks quality improvements.	One FTE shared across approximately 10 panels
Access		
Triage Nurse/ Clinic Oversight	Provides access to primary care services based upon patient need and oversees clinical workflows.	One FTE shared across approximately six panels
Behavioral Health Integration		
Behavioral Health Consultants	Clinical psychologist and psychiatrist provide additional behavioral health services through psychological evaluation, substance use disorder diagnosis and treatment, and prescribing medications.	One FTE shared across approximately 10 panels
Medication Management		
Clinical Pharmacist	Medication management and patient/provider medication education.	One FTE shared across approximately 10 panels

Collaborating Care Team Member	Primary Responsibilities	Recommended Ratio*
Care Coordination, Health Education and Care Management		
Care Coordinator/Referral Manager	Organizes the care of the patient, including scheduling and follow-up of specialty appointments.	One FTE shared across approximately 10 panels
Self-Management/Health Educator	Develops programs and provides materials to teach patients and their families about health topics to manage their health conditions.	One FTE shared across approximately 10 panels
Care Manager	Aims to improve care of patients with chronic conditions through patient education, goal setting, self-management teaching, and coaching.	One FTE across approximately three panels

*This ratio assumes approximately 1,250 patients per panel.

ENDNOTES

- 1 Meyers D, LeRoy L, Bailit M, Schaefer J, Wagner E, Zhan C. Workforce Configurations to Provide High-Quality, Comprehensive Primary Care: a Mixed-Method Exploration of Staffing for Four Types of Primary Care Practices. J Gen Intern Med. 2018 Oct; 33(10):1774-1779. doi: 10.1007/s11606-018-4530-7. Epub 2018 Jul 3. PMID: 29971635; PMCID: PMC6153217.