Acute Case Management Worklist Overview for Patient Care Management

Cerner PowerChart EDUCATION

Acute Case Management Worklist

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List Maintenance

Acute Case Management

📀 Manage Criteria

The Acute Case Management (ACM) Worklist, located on the PowerChart toolbar, is an online worklist that combines the functionality of the Transition Planning and UR Worklists.

Patient Lists

The ACM Worklist correlates with the patient lists each user has set up in PowerChart. 1. Click on Manage Criteria to display available lists.

a. List Maintenance allows the user to update lists and/or create new lists.

2. Select the appropriate Patient List by location or custom list.

Additional search options are available:

- a. Health Plan
- b. Encounter Type

3. Click Apply.

Establishing Relationships

When the selected Patient List displays, some columns will be grayed out until relationships are established.

Acute Case Management Worklist							👯 Ful	l screen	🖶 Print	🗲 15 minu	utes ag
Acute Case Management $ imes$ $+$											
Search Manage Criteria List Maintenance	-					Est	ablish Re	elationshi	ps Print) 💴 F	ilter
Patient ^	Notes	Discharge Plan	Payer	Utilization Review	Loca	Provider	😑 Re	eadmissio	n Risk Score	DC Order	Info
*CERNED, DENISE 68 yrs F DOB: JUL 13, 1955	F Initi	In Process Next Assessment:	Priority Health	Approved Inpatient Next Review: SEP 2	4408-A D4	A	relati ished	onship for in) must be	n to	
*CERNED, OLIVER 64 yrs M DOB: MAR 04, 1959	DC Pla	In Process Next Assessment:	Commercial N	Approved Inpatient Next Review: SEP 2	4409-В D4	Cotabl	F	opula	te —	•	

- 1. Click Establish Relationships.
- 2. Check the box next to names of patients to whom you are assigned.
- 3. Click Submit.
- 4. Information previously grayed out will now display in those columns for the selected patients.



Establish Relationships Relationship: Care Management

Select Patients Select all





👫 Acute Case Management Worklist



X

MRN: MT1657992 FIN: MT1720100189

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Column Details

The ACM Worklist is divided into 13 columns. Additional information will display in a side window details box for the associated patient when clicking on a blank space in each column. Close the side window by clicking the X.

Acute Case Management Worklist

*CERNED, OLIVER 64 yrs M

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Acute Case Management ...

Patient

DOB: MAR 04, 1959

FIN: MT1720100191

*CERNED, JOE 52 vrs

MRN: MT1679650

DOB: SEP 12, 1971

FIN: MT1720100189

MRN: MT1657992

- 1. Patient
 - a. Sort the patient names from A-Z or Z-A by clicking on the Patient column header.
 - b. A black flag indicates the patient has opted out of the facility directory and does not want anyone to know they are a patient here.
 - c. Single click on the patient's name to open their chart.
 - d. Click in the empty space near the patient's name to open a details box with additional information.

2. Notes

- a. Care Management notes, also known as 'sticky notes', display information regarding discharge planning, clinical review updates, and general information.
- b. An orange flag will display if an item is marked as Important.
- c. The details box is used to:
 - View more information.
 - Add a note.
 - Modify or Remove a note.
- d. View the education document, **Sticky Notes**, located on the <u>Clinical EHR Education</u> website for additional information.

Acute Case Management Worklist

 Acute Case Management ... ×

 Patient

 *CERNED, DENISE

 68 yrs

 b

 Prior Auth for SNF pending. Initial Complete.

 DOB: JUL 13, 1955

CERNED, JOE

Patient

52 yrs

Sex:

DOB

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* Name Alert

CERNED, JOE Age:

52 yrs Male DOB: SEP 12, 1971



- 3. Discharge Planning
 - a. Discharge Plan Status, Next Assessment date, and Post Acute referral updates display.
 - b. The Discharge Plan Status and Next Assessment Date are updated in the details box.

Patient 3	Discharge Planning	
*CERNED, DENISE DOB: JUL 13, 1955	In Process Next Assessment: SEP 27, 2023 09:00	EDUCATION, SOLLY 56 yrs Male DOB: MAR 19, 1967 MRN: MT1007402 FIN: MT172010011
EDUCATION, SOL	Not Available	Discharge Planning b
DOB: MAR 19, 1967 FIN: MT1720100111 MRN: MT1007402	Next Assessment: No Date	Discharge Plan Status
	Last opuate:	In Process
MRN. MT 1007402		Next Assessment
		mm/dd/yyyy 🎬 h:mm
		View Full Referral Details



Acute Case Management Worklist Overview for Patient Care Management

- 4. Length of Stay (LOS)
 - a. Length of current hospital encounter displays.
- 5. Payer
 - a. Displays the payer(s) associated with the patient.
- Patient 5 Payer
 *CERNED, DENISE
 DOB: JUL 13, 1955

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- b. Payer contact information displays in the details box.
- 6. Utilization Review
 - a. Patient status and Next Review date.
 - b. Last Review date and reviewer name.
 - c. Click the hyperlink in the details box to View Full Utilization Review.

Patient

*CERNED, DENISE

DOB: JUL 13, 1955

FIN: MT1720100185

7. Location

- a. Unit, room number and bed display.
- b. More information displays in the details box.
- Patient 7 Location *CERNED, DENISE a 4408-A DOB: JUL 13, 1955 D4

Utilization Review

Approved Inpatient

Next Review: SEP 29, 2023 09:00

Last Review: Yesterday 09:17,



- 8. Alerts display in order of priority, if applicable:
 - Fax Failure of clinical review or post-acute faxes.
 - LOS Passed the Authorization Date.
 - Patient Readmitted.
 - Unassigned Patient with Discharge Order.
 - Concurrent Denial Documented.
 - Multiple Working Groups Exist.
 - Secondary Review Pending Outcome.
 - Follow-up Response is Past Due.
 - LOS Passed the PDD.





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CERNED, DENISE 68 yrs Female DOB: JUL 13, 1955	MRN: MT1679667 FIN: MT1720100185
Payer Information	
Name: Priority Health HealthPlan: Priority Health FINClass: PRIORITY HEALTH	
Address Grand Rapids MI 49501	
Phone Number (800) 942-4765	

MRN: MT1679667

FIN: MT1720100185

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CERNED, DENISE 68 yrs Female DOB: JUL 13, 1955

Utilization Review (0)

09 / 29 / 2023 🛗 09 : 00
View Full Utilization Review

UM Status

Next Review

Approved Inpatient



Acute Case Management Worklist Overview for Patient Care Management

- 9. Provider column requires a one-time set up.
 - a. The column initially appears blank. Click on the blank section.
 - b. Click Display Physician to set the Admitting Provider to display face up on the ACM Worklist for all patients.
 - c. The Assigned Nurses section is not functioning at this time.
- 10. Readmission Risk Score
 - a. Risk category and score display, if applicable.

11. DC Order

a. Displays when ordered and includes ordering physician name.

Patient

EDUCATION, SOLLY DOB: MAR 19, 1967

Info

Patient

12

12. Info

- a. The Case Management Assessment form can be opened and documented from the details box by selecting Open Form.
- b. Information from specific fields documented in the Case Management Assessment form display in the Info column on the ACM Worklist.

Menu

Allergies

Form Browser

P All Forms

EDUCATION, SOLLY DOB: MAR 19, 1967	Estimated Discharge Date: SEP 29, 2023 Readmission Transition Doc Complete: Yes Readmission DC Planning Doc Complete: No Discharge To, Anticipated: Skilled nursing facilit Disposition Arrangement Plan A: SNF Plan B.
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Open Form

Info

Provider Assigned Nurses Physicians Admitting Provide Brown MD, Natalie S (231) 935-5000 10





Open Chart

EDUCATION, SOLLY 56 yrs Male DOB: MAR 19, 1967



13. Care Manager

a. Displays the name of Case Manager signing the Care Management Assessment form.

on the dark blue menu of the patient's chart.







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