

Creating a Worklist for Post Discharge Follow Up Calls for Patient Care Managers

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- 1. Navigate to the Transition Planning Worklist.
- 2. Click on Readmission Worklist.
- 3. Create a name for the Follow Up Call list.
- 4. Click on the **Primary** tab and set the following filters:
 - a. Click Facility.
 - b. Select the bubble for the facility where you work.
 - c. Click on Building.
 - d. Select the bubble for your facility building.
- 5. Click on the **Secondary** tab and set the following filters.
 - a. Click Encounter Status.
 - b. Select Discharged.
 - c. Click Encounter Type.
 - d. Check I/P (Inpatient) and OBS (Observation).

Note: There are additional filter options. These instructions display the recommended filters.

- 6. Click Save List.
- 7. Click Set Filters.

The Dashboard now displays **Follow Up Phone Calls Due**.





Filters	
Saved Worklist	
Select or Create a saved list : * MMC Dischar	ged 👻
Primary 5 Secondary Dashboard Select	tions
Encounter Status a 1	Cancelled
Discharge Disposition	Hold Pending Arrival Preadmit Referred Rejected Pending Arrival Transferred



Saved Workli	st						
Select or C	reate a saved list :	* MMC Discharged	•		6	Save List De	ete Lis
Primary	Secondary	Dashboard Selections				Select All	Clear
Encounter S	tatus		1	V I/P (Inpatient)	OBV (Observation)		
Encounter T	уре		2	Core (moteodial Extended Stay)			
Reset					2	Set Filters	Can



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8. From the Readmission Risk category, click the **High and Moderate** widgets.



9. Follow Up Calls display by the day they are due. Check the desired box.

Follow Up	Phone Calls Due			_
	7	8	11	8
- 1	Overdue	Yesterday	Today 🗸	

Viewing the Follow Up Calls Worklist

- 1. Click the Dashboard drop down arrow.
- 2. Select Worklist.
- 3. The Worklist displays all patients on the **Discharged list** here from the categories selected on the Dashboard.
 - a. Select the patient's name.
 - b. Click on the Follow Up tab.
 - c. Click on the blue hyperlink to open the Readmission Post
 DC Follow Up Phone Call
 PowerForm.

Readmission Worklist	READPREVTEST, PENGUIN					
Worklist - 3 &	Verview Readmission Risk Sup * Follow Up Phone Call	pp Serv/Interdisp 2 Documentation 2 Transition Readin D Follow Up 1				
DOB:04/02/1944 M A3 I/P (inpatient)	Status Type No Results Found Follow Follow Up Date/Time:	Up Phone Call C Title Readmission Post DC Follow-Up Phone Call				

