Custom Transition Planning Worklists for Case Managers

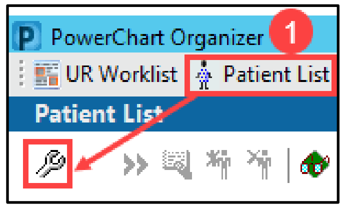
The Transition Planning Worklist is the online work organizer for Case Managers and displays the Patient List for each unit. A custom Transition Planning Worklist list may be created to view only patients on the user's caseload.

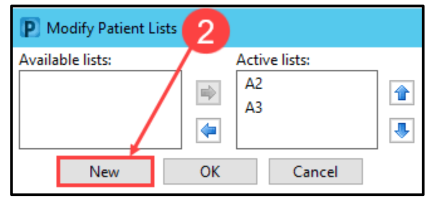
Create a Custom Patient List

First, a custom Patient List must be created:

1. Select **Patient List** from the toolbar. Select the **wrench**.

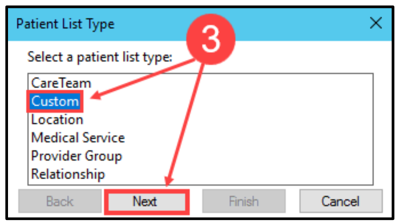
2. Click **New**.

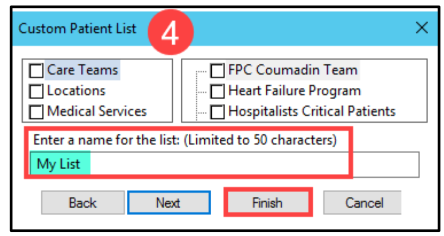




3. Select **Custom** from the Patient List Type, then click **Next**.

4. Enter a name for the new list. Click **Finish**.



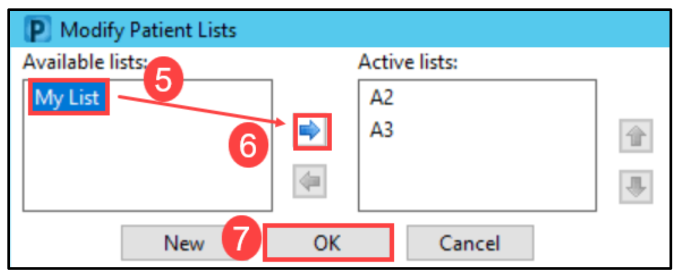


5. Click on the new list name in Available Lists.

6. Click the activated arrow to move the list to Active lists.

7. Click **OK**.

8. The new list tab displays on the Patient List screen.



Populating the Custom Patient List

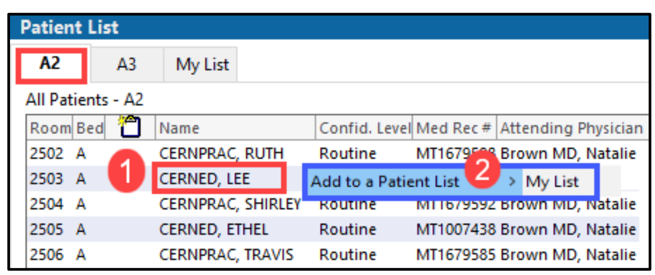
Next, populate the Custom Patient List by adding patient names from the unit list(s).

Add a Single Patient:

1. On the unit list, **right click** on the patient's name.

2. Click or hover on **Add to a Patient List**, select the custom list.

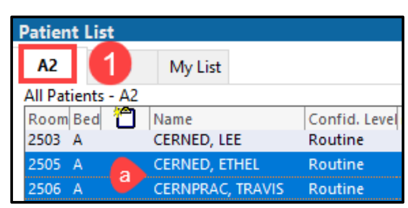
3. Repeat until patients on the user's caseload have been added from the unit list(s).



Add Multiple Patients:

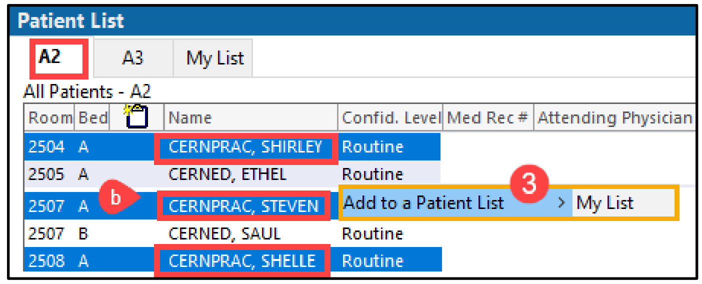
1. On the unit list(s):

   a. **For rooms in succession**, click and drag the mouse to highlight patient names.



b. **For rooms not in succession**, hold the Ctrl key down, left click on the patient names.

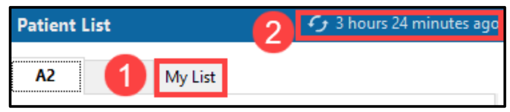
2. Right click on **one** of the highlighted patient names.
3. Click or hover on **Add to a Patient List**, select the custom list.
4. Repeat to add patients from other units, if needed.

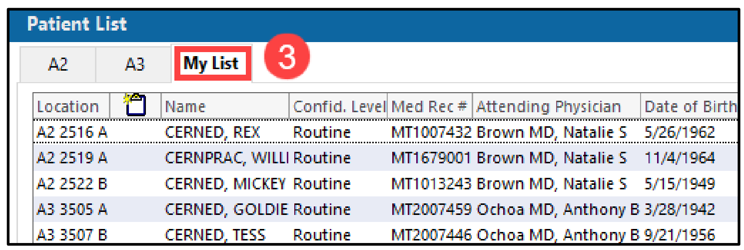


View the Custom Patient List

After adding patients to the custom list:

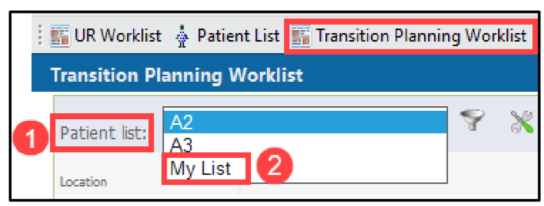
1. Select the Custom List tab on the Patient List screen.
2. Click **Refresh** on the right side of the screen.
3. The selected patients display on the custom list.



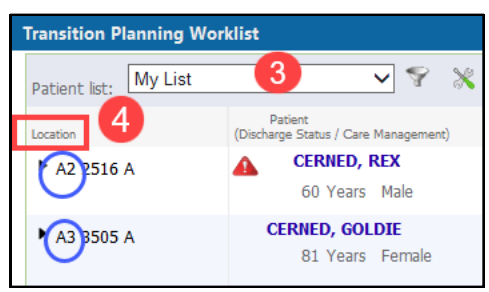


View the Custom Transition Planning Worklist

1. Navigate to **Patient list** on the Transition Planning Worklist.
2. Select the new custom list from the drop down menu.



3. Patients from the custom Patient list display.
4. Note the unit in the **Location** column if working on multiple units.



Note: Filters may need to be set if patients are not displaying after being added to the Custom List. See the EHR Education Website for instructions on setting filters.