ABOUT™

ENSOcare®

User Guide
June 2023

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Glossary of Terms

Book/Booking: This reserves the Placement or Service that will be used to fulfill a Transition Plan Item. Upon booking, the chosen provider is notified that they were selected, and any other providers are notified that the Patient was placed elsewhere.

Level of Care: The type of care the facility or an agency is licensed to provide.

Patients: The list of patients assigned to a user.

Patient Choices: A list of post acute providers selected by the discharge planner for the Patient to review and rank in order of most to least desired.

Placement: A post acute provider that reserves a bed within their facility for the Patient to continue care after discharge.

Quick List: A list of commonly used providers that ABOUT Ensocare customizes for the institution.

Service: A post acute provider that provides care after the patient has been discharged, either in the patient's home or an outpatient setting.

Transition Plan: A list of placements and services to be fulfilled after a patient transitions from their current setting.

Transition Plan Item: An individual item in a Transition Plan to be fulfilled after a patient transitions from their current setting of care.

Unbook/Unbooked: A booking with a provider has been removed. This is done when a placement or service is no longer needed or cancelled after the referral has been booked.

User: A named user with a username and a unique email in the ABOUT Ensocare system.

Introduction

The Patient discharge process starts at admission.

ABOUT Ensocare automates the discharge process with web-based software that facilitates a Patient's transition to care in the community.

On-demand access to our industry-leading, no-cost network of registered United States providers helps to streamline the care management process by reducing time per discharge, improving throughput, and increasing staff productivity.

ABOUT Ensocare's ability to run reports also improves responsiveness. Our clients receive referral responses within a median of 30 minutes. Timely, accurate Patient placements reduce length of stay and follow a model of continuous improvement that is integral to our product.

Feature Options

ABOUT Ensocare has many feature options available at the hospital level during implementation. Feature option decisions made during implementation can be updated by calling our 24-hour Customer Support Team at 877-852-8006.

Notification Choices – Users can choose to have text, email, or both types of notifications.

Patient Choice – A feature that allows printing Patient choices after sending a referral(s).

Placement Selection Factors – A feature that allows a Case Manager to choose from a list of reasons why the Patient chose the booked provider. The chosen reason will be visible to the provider that was booked and to the providers that were not booked.

Create a Transition Plan and Send Referrals

This user guide covers the basic steps for using ABOUT Ensocare to place a Patient with post acute providers. It also contains information for navigating ABOUT Ensocare after a user has selected the Patient in Cerner and attached the Cerner Packet Template.

The basic steps are:

1. Select Clinical Packet in Cerner
2. Access Ensocare (Care Finder-Pro) from Cerner
3. Add and Send Additional Clinical Documents
4. Add and Send Patient Referrals
5. Send Additional Clinical Documents
6. Book to Post Acute Placements
7. Close Patient

1. Select Clinical Packet in Cerner

Pre-defined packets are templated at the enterprise level by the National Social Work Steering Committee. Change requests should be directed through the Oracle CGS implementation representative and/or Oracle CGS support.

Figure 1. Detail of Pre-defined Packet Item Examples

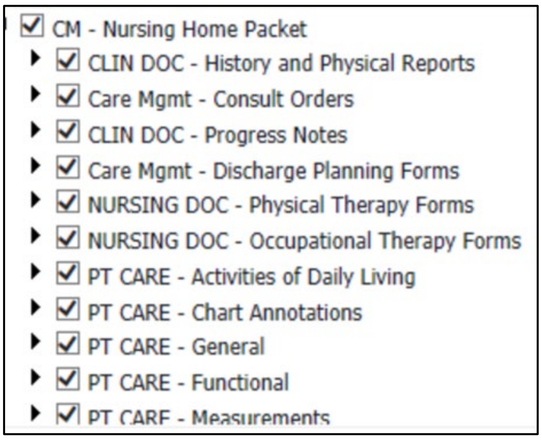
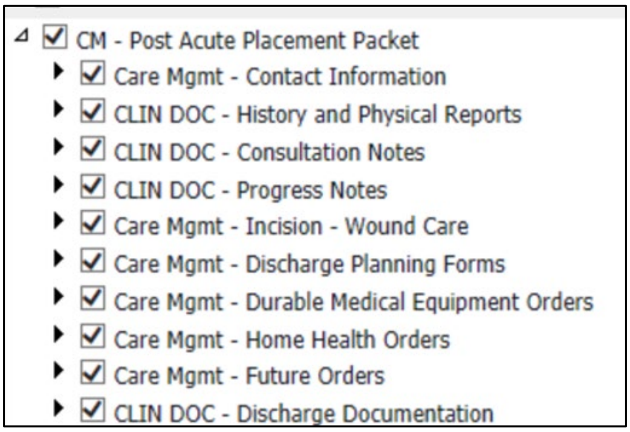


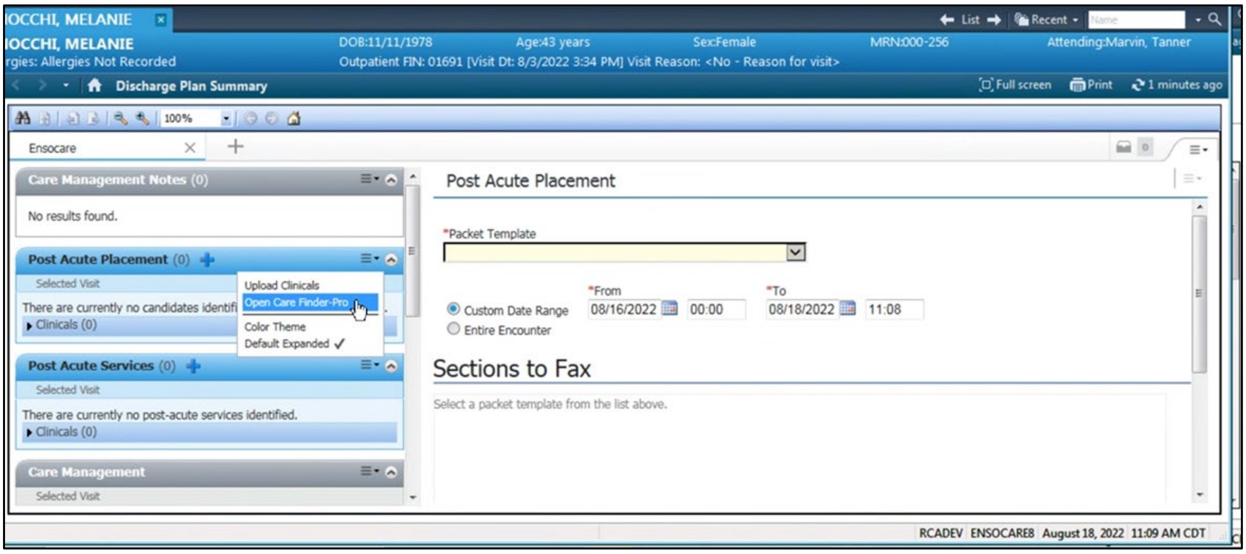
Figure 2. Detail of Pre-defined Packet Item Examples



2. Access Ensocare (Care Finder-Pro) from Cerner

Click the hamburger menu in the **Post Acute Placement** section and click **Ensocare (Open Care Finder-Pro)** to access Ensocare Transition.

Figure 3. Detail of Cerner screen

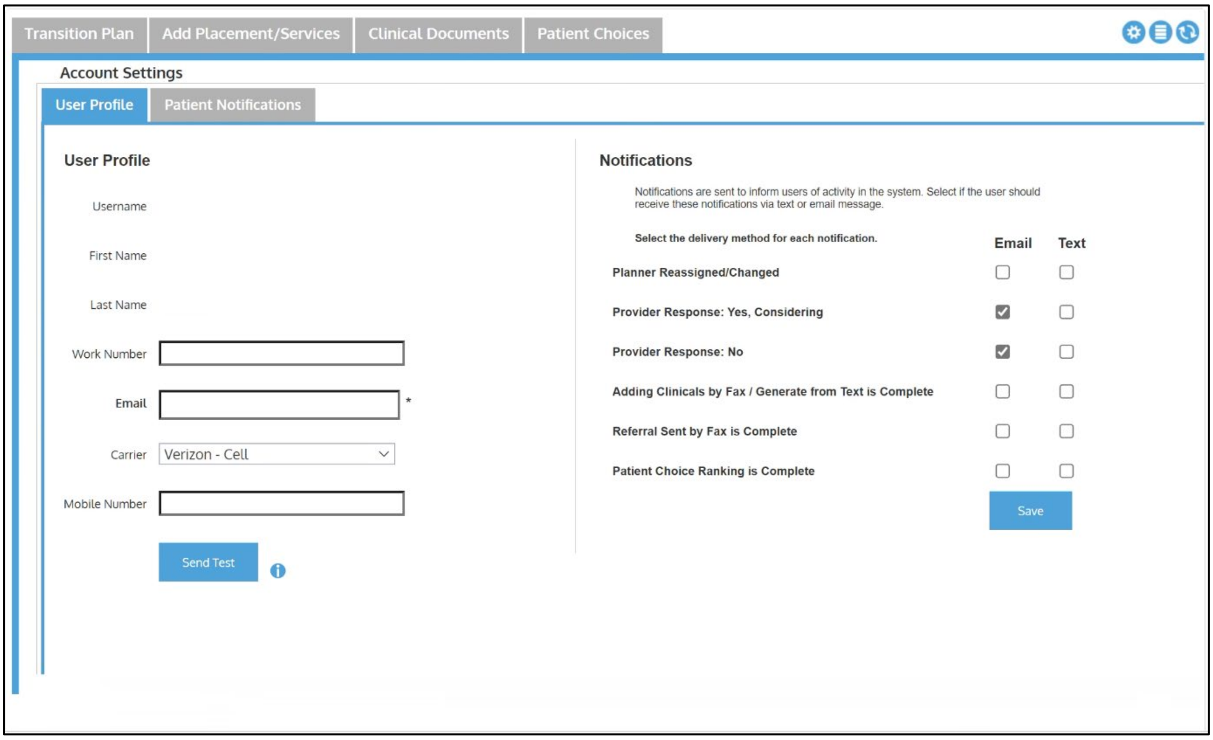


Navigating Ensocare

Initial Setup

The first time a user opens Ensocare, they will be prompted to configure their user profile and notification preferences.

Figure 4. Detail of User Profile



User Profile

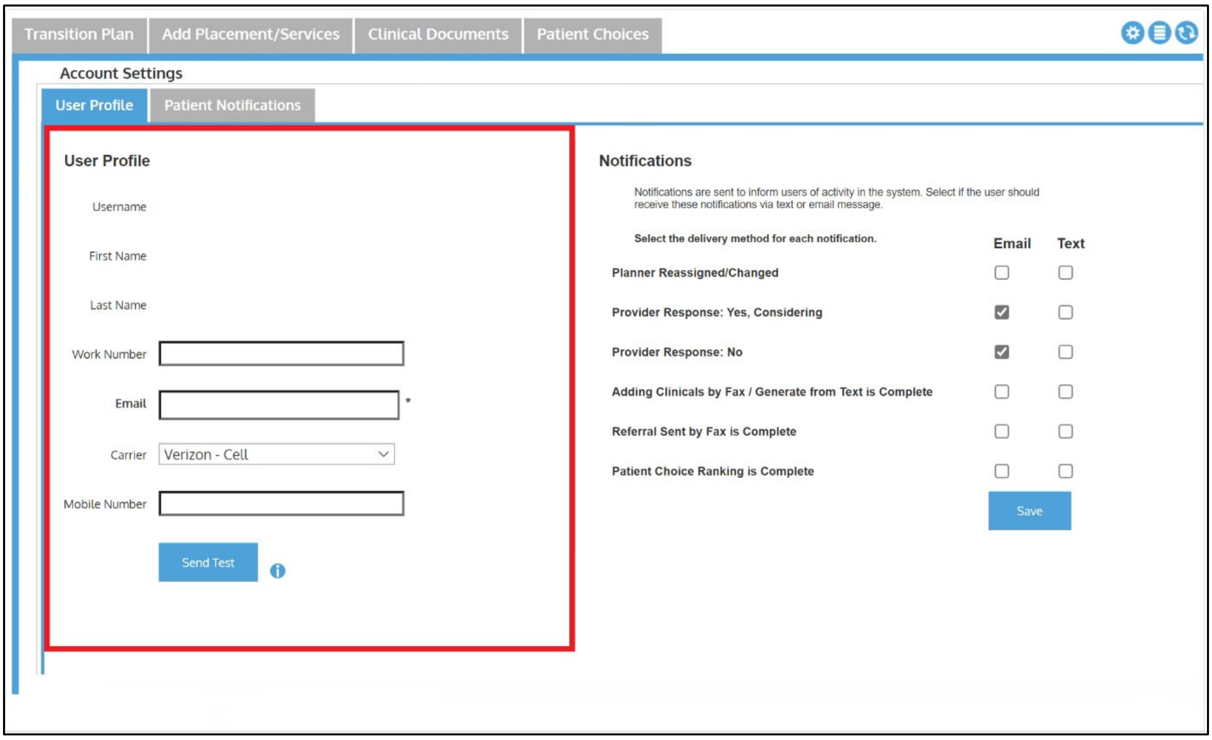
The **User Profile** contains information specific to that user:

- **Username, first name**, and **last name** are auto populated by Cerner.

Configurable Fields include:

- **Work number** – enter the preferred contact phone number as this will be visible on referrals.
- **Email address** – this is a required field and will be used when opting for email notifications. Example: (dischargeplanner@va.gov)
- **Carrier** - users confirm the carrier with their local administrator since incorrect information can impact the receipt of text notifications.
- **Mobile number** – enter the mobile number when opting for text messages.

Figure 5. Detail of User Profile



Notifications

When selecting notifications, there are two options: email or text.

Check the box(es) next to the notification(s) users want to receive.

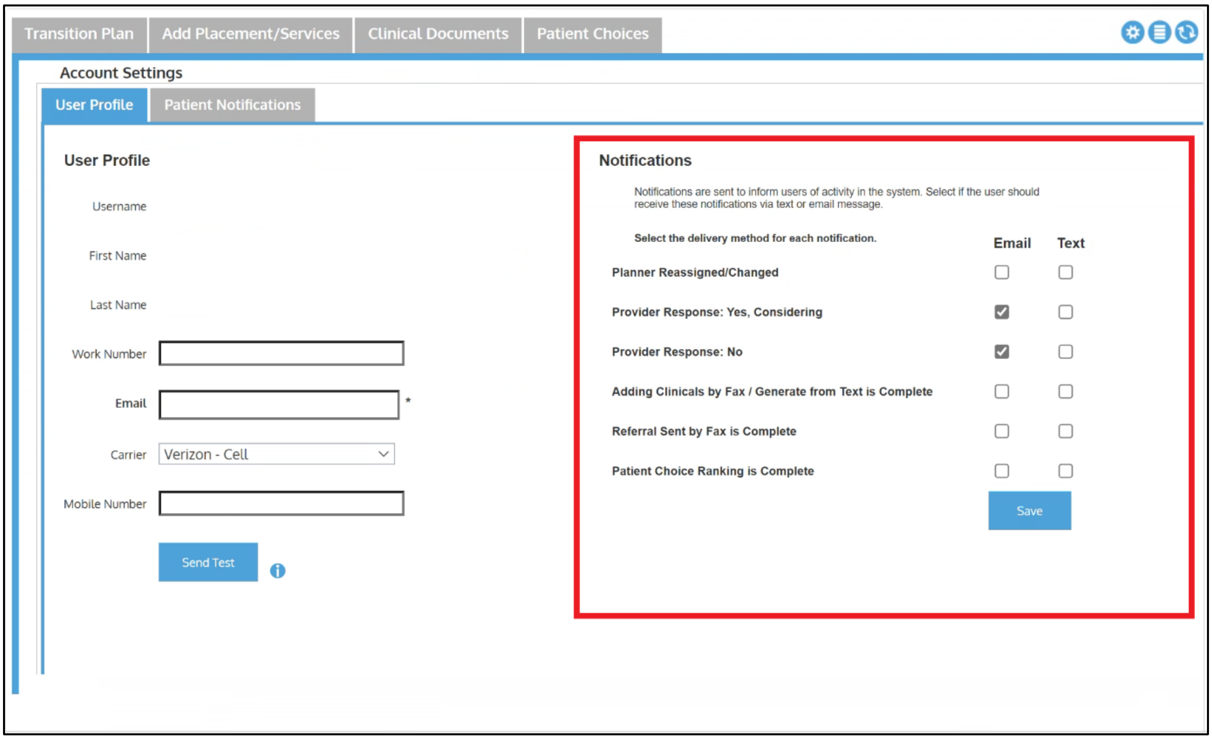
> **Note**: At least one notification must be marked to receive notifications.

To verify receipt of text notifications, click the **Send Test** button to send a sample notification to the mobile number entered in the profile.

> **Note**: The text message instructs users to call customer support; however, since this is a test of the notifications, users do not have to call customer support.

Click the **Save** button at the bottom of the notifications lists or users will be prompted to set up their profile and notifications each time they launch Ensocare until they save their selections.

Figure 6. Detail of Notifications



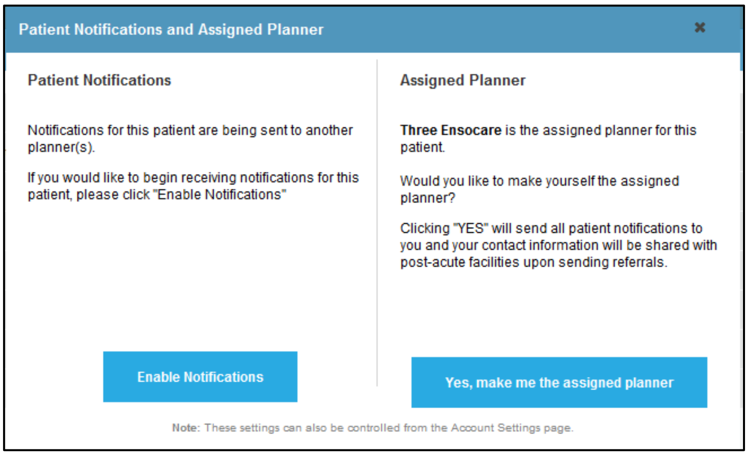
Patient Notifications

If there are multiple planners working in the environment, the **Patient Notifications and Assigned Planner** dialog box is where users can choose who receives notifications in addition to the [Assigned Planner].

Users can:

- Click the **Enable Notifications** button. If users choose to enable the notifications, they will not change to whom the Patient is assigned, and users will have the ability to disable the notifications later.
- Click the **Yes, make me the assigned planner** button. If users choose to make themselves the planner, they will now have this Patient on their worklist.
- Click the **X** in the top-right corner of the dialog box to close the window and keep the notification settings.

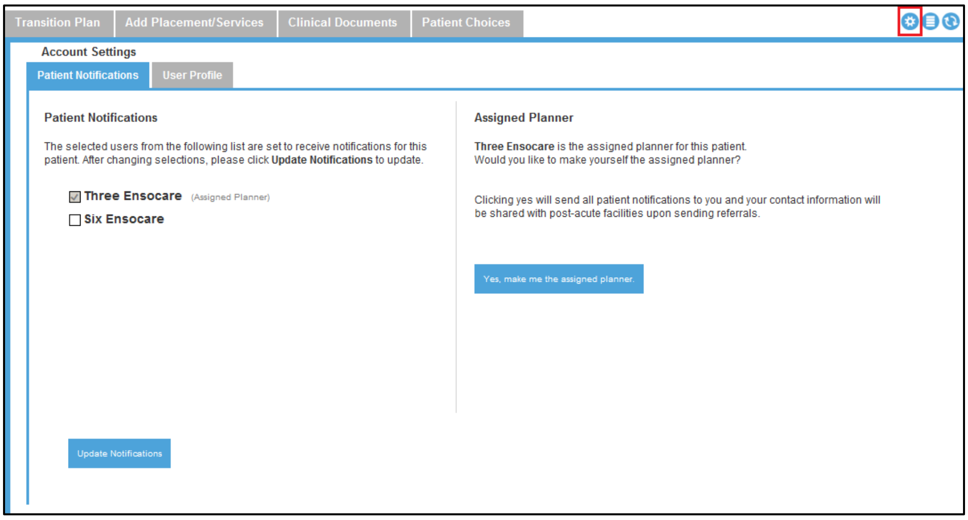
Figure 7. Detail of Patient Notifications and Assigned Planner dialog box



To disable or edit notifications:

1. Click the **Account Settings** icon at the top-right corner of the Ensocare screen.

Figure 8. Detail of Account Settings icon

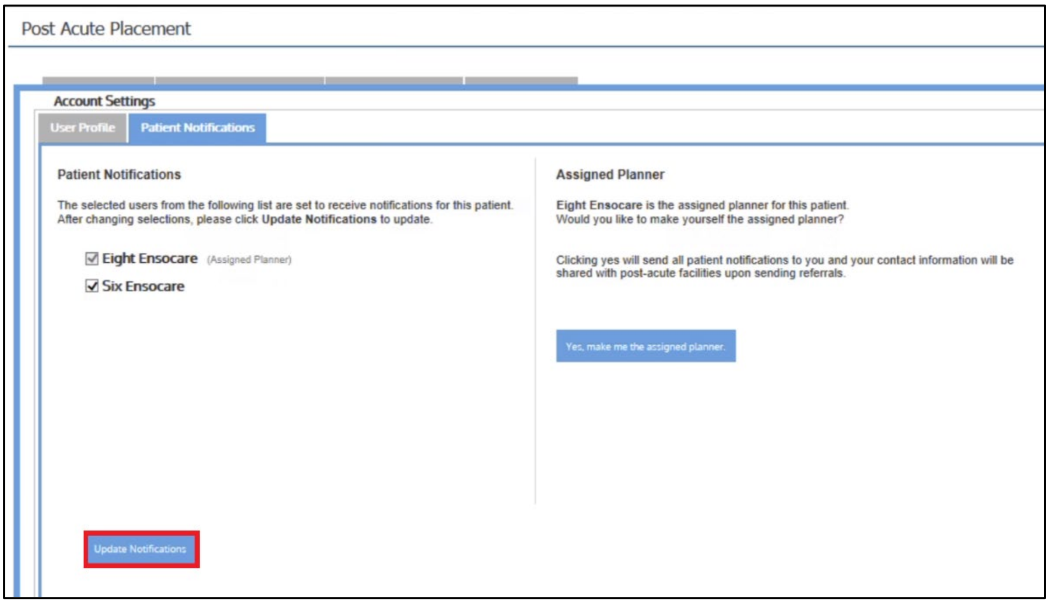


2. Uncheck the box next to the user's name to disable their notifications.

3. Click the **Update Notifications** button near the bottom-left corner of the screen to save the changes.

Note: The Patient Notification tab is only for the specific Patient the user is viewing.

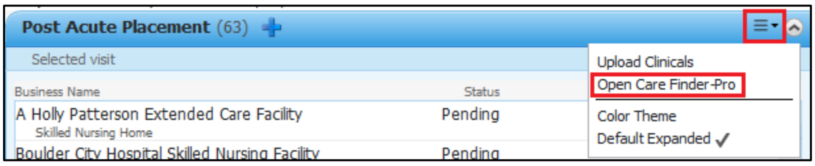
Figure 9. Detail of Update Notifications button



Transition Plan

1. To manage referrals, click the **hamburger menu** in the top-right of the header for **Post Acute Placement** on the left side of the screen and click **Ensocare (Open Care Finder-Pro)**.

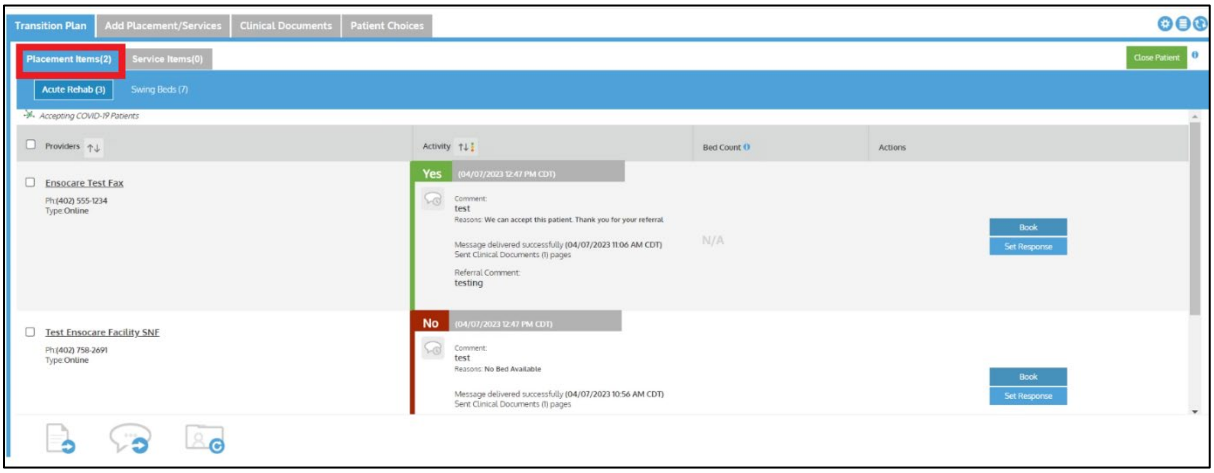
Figure 10. Detail of Post Acute Placement



Note: Previously sent referrals are organized by level of care.

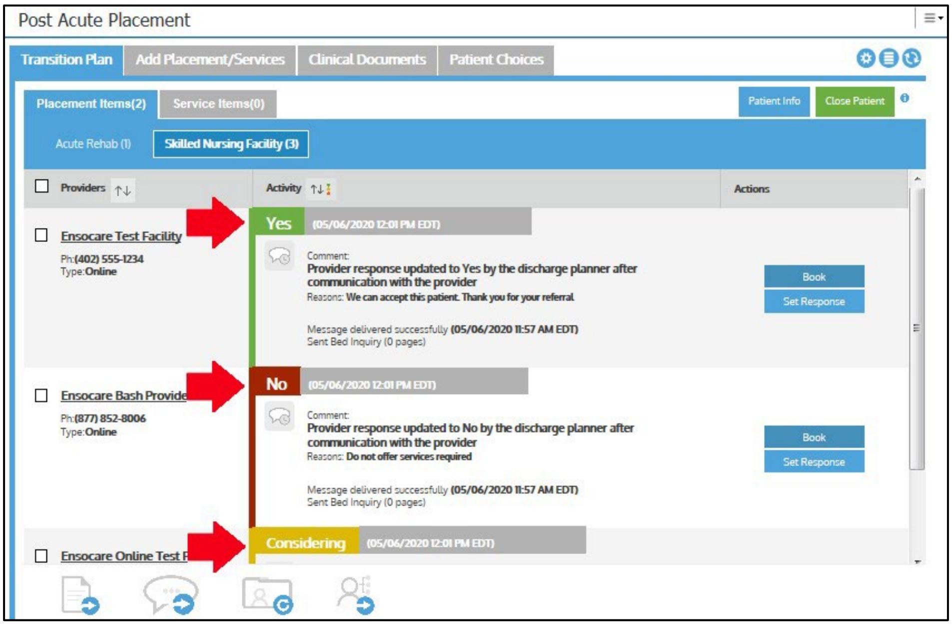
2. **Placement Items** are grouped in one tab, and **Service Items** are grouped in another.

Figure 11. Detail of Placement Items and Service Items tabs



3. Responses from providers on the **Transition Plan** are color-coded as follows:
   - **Yes** responses are **green**.
   - **No** responses are **red**.
   - **Considering** responses are **yellow**.

Figure 12. Detail of Responses



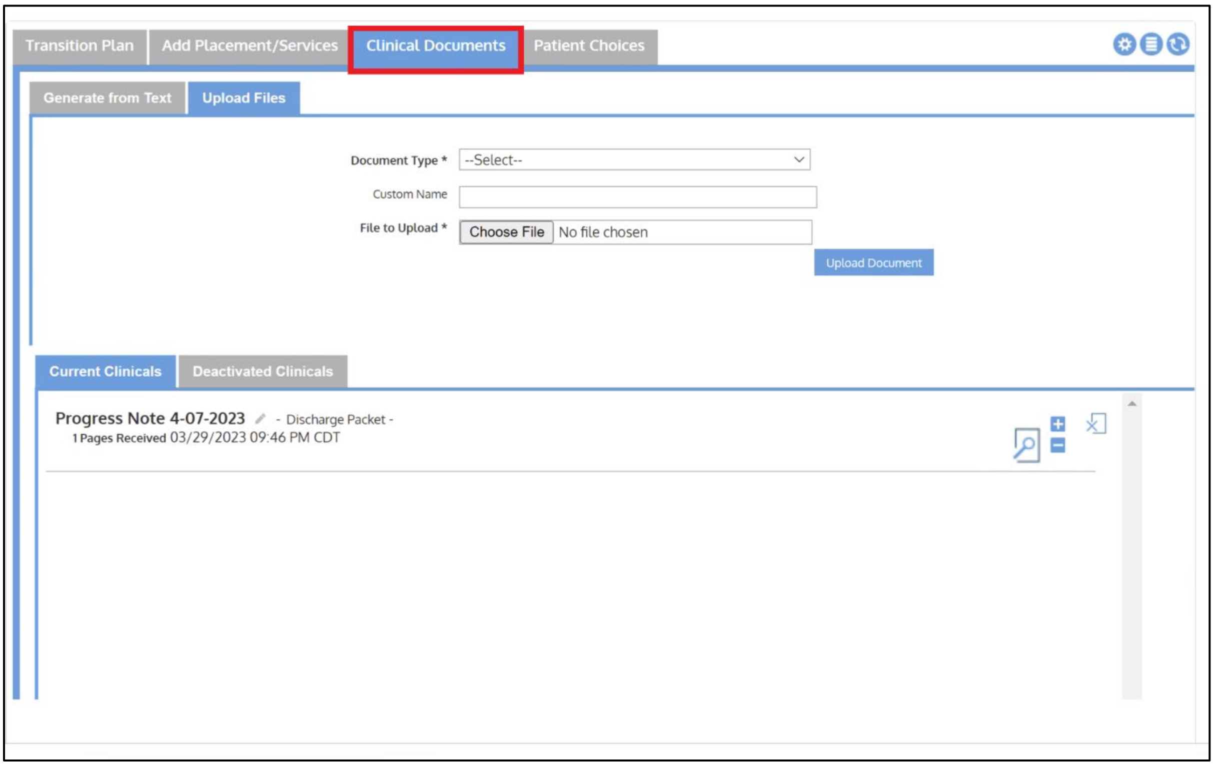
Add Clinical Information that is not in a Pre-Defined Packet and Send to a Provider

Use this workflow to add clinical information from the patient's medical record that is not part of the pre-defined packets for the facility.

This information may be in another area of the chart or exist as files on the network drive. Files must be saved as a PDF. For information on sending additional clinicals already uploaded to Ensocare, click here.

1. Click the **Clinical Documents** tab at the top of the screen.

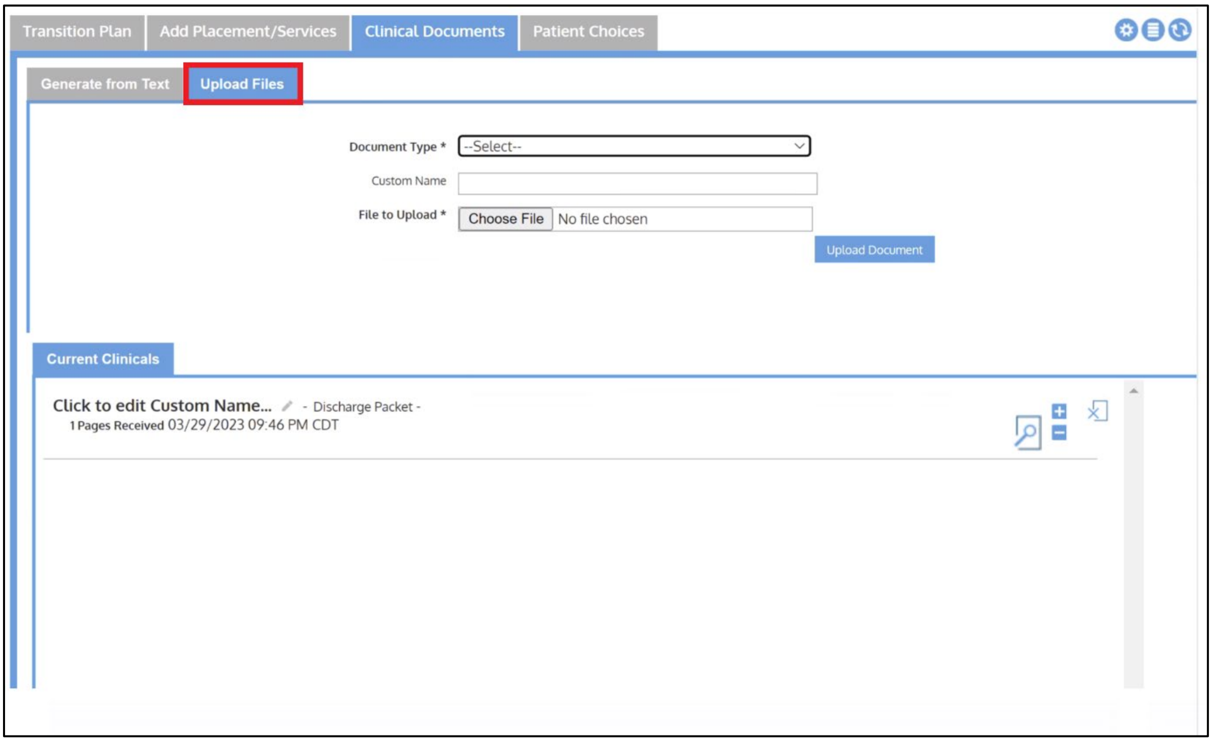
Figure 13. Detail of Clinical Documents tab



To upload an electronic version of documents that are located on the computer or network:

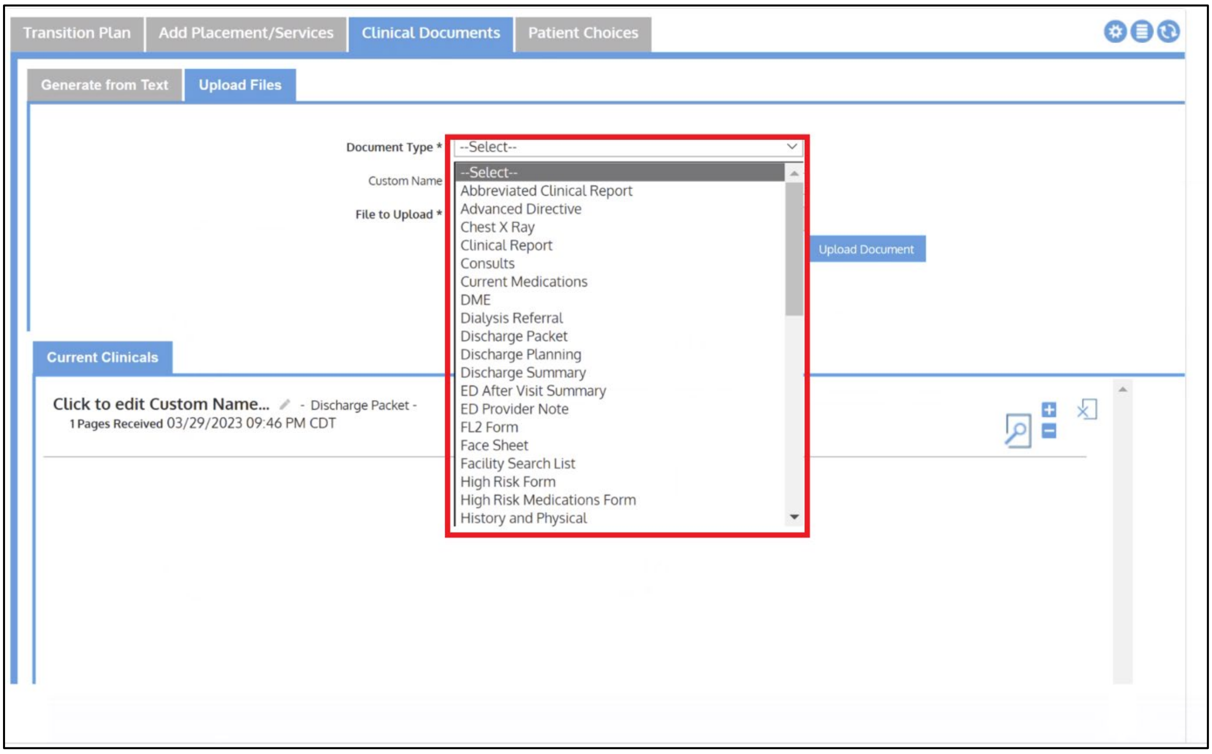
1. Click the **Upload Files** tab near the top of the screen.

Figure 14. Detail of Upload Files tab



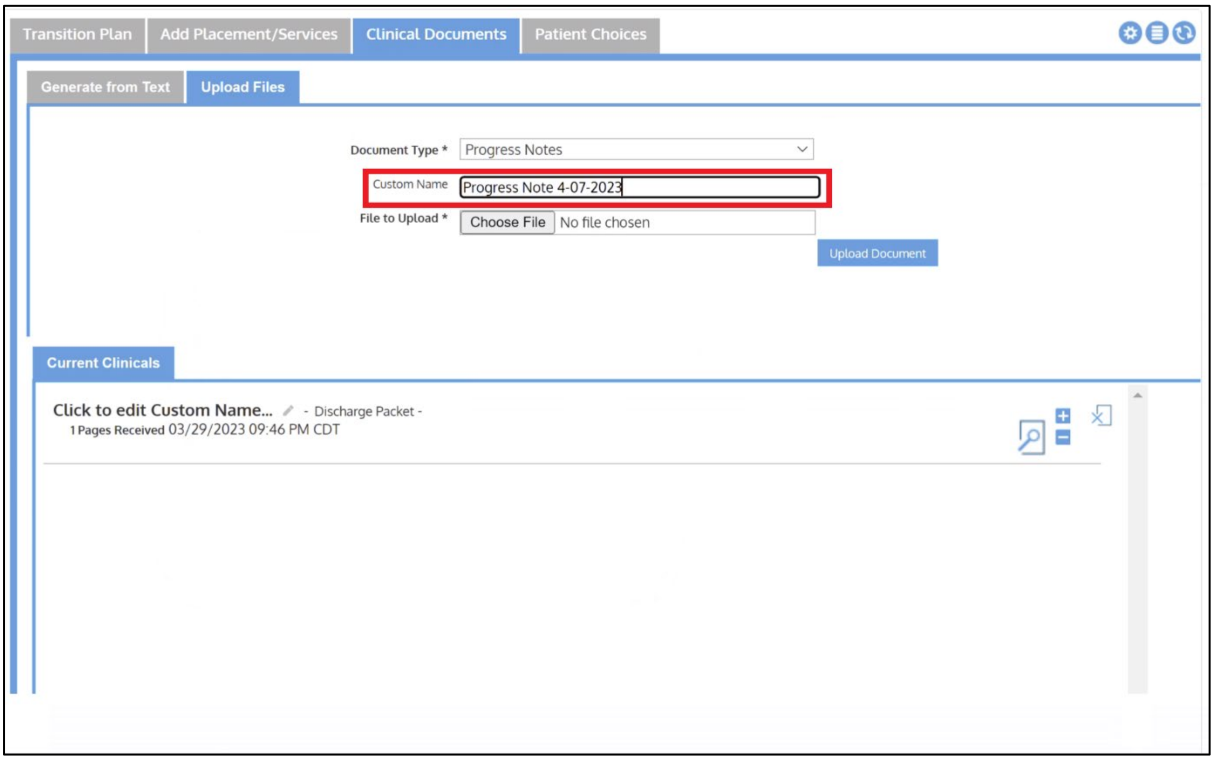
2. Select a **Document Type** from the drop-down list.

Figure 15. Detail of Document Type drop-down list



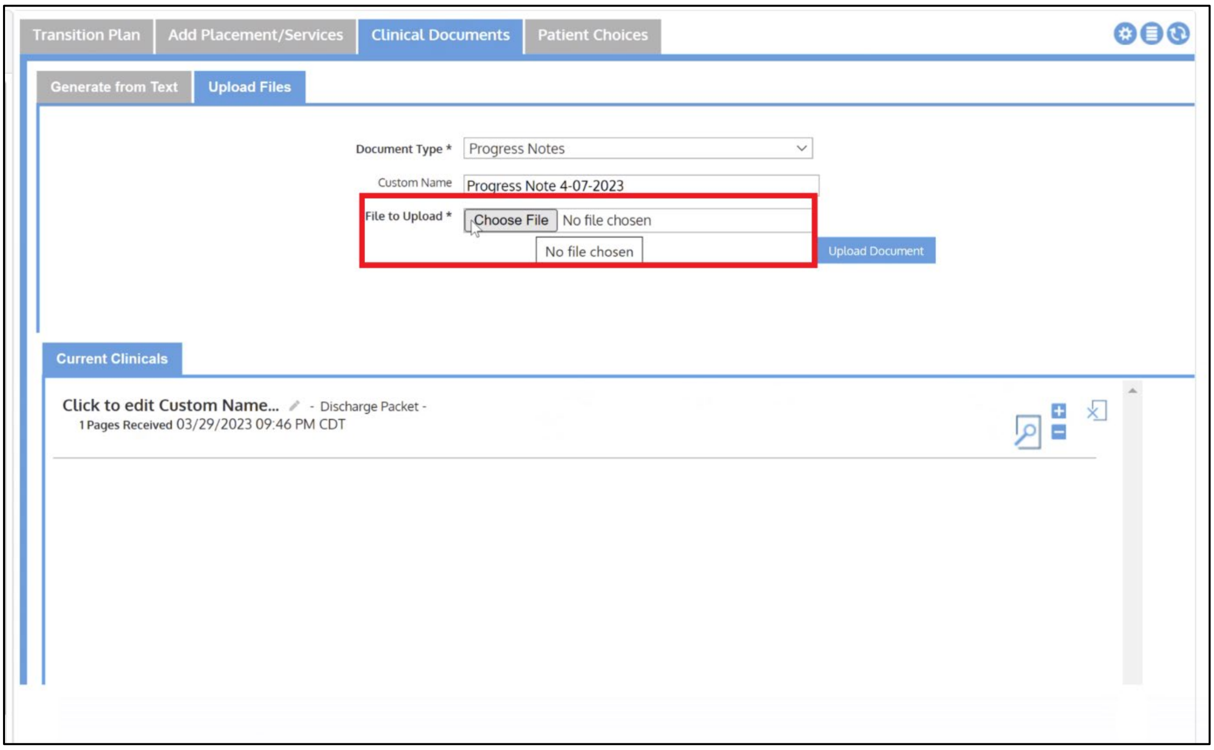
3. Enter a **Custom Name** for document identification (optional). If the field is blank, the name will default to the document type.

Figure 16. Detail of Custom Name



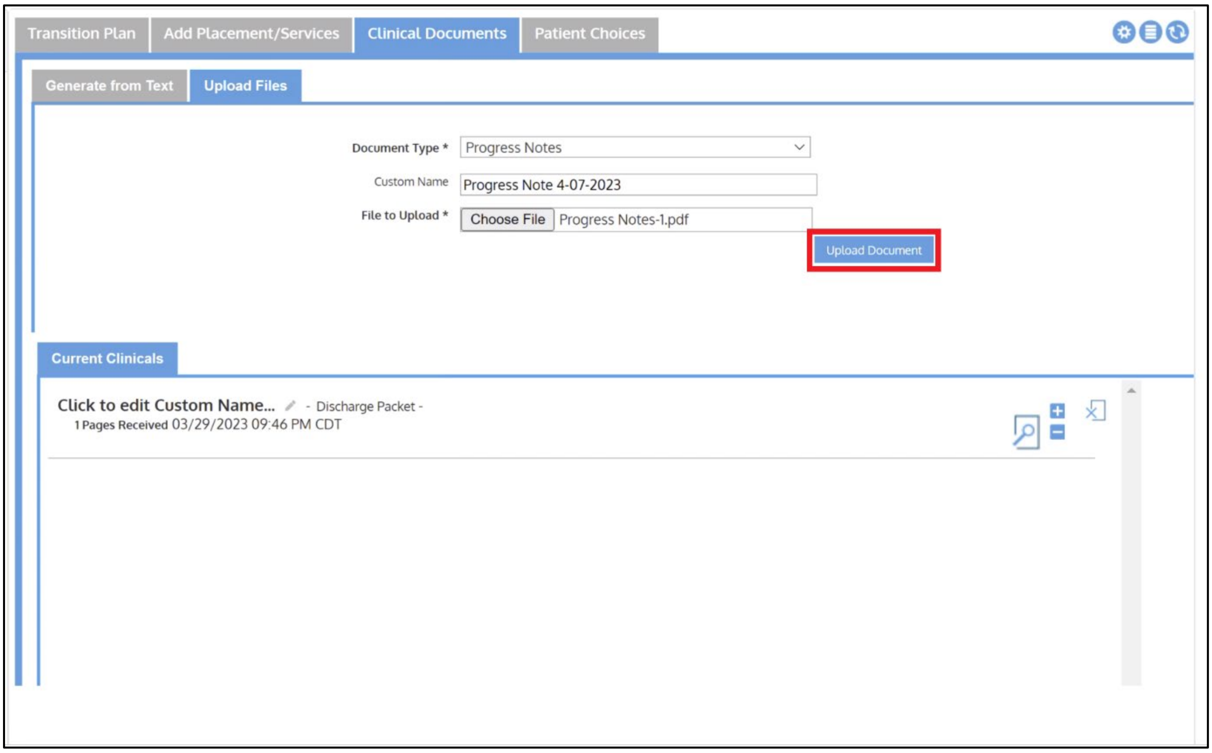
4. Click the **Choose File** button and locate the document on the computer or network.

Figure 17. Detail of Choose File button



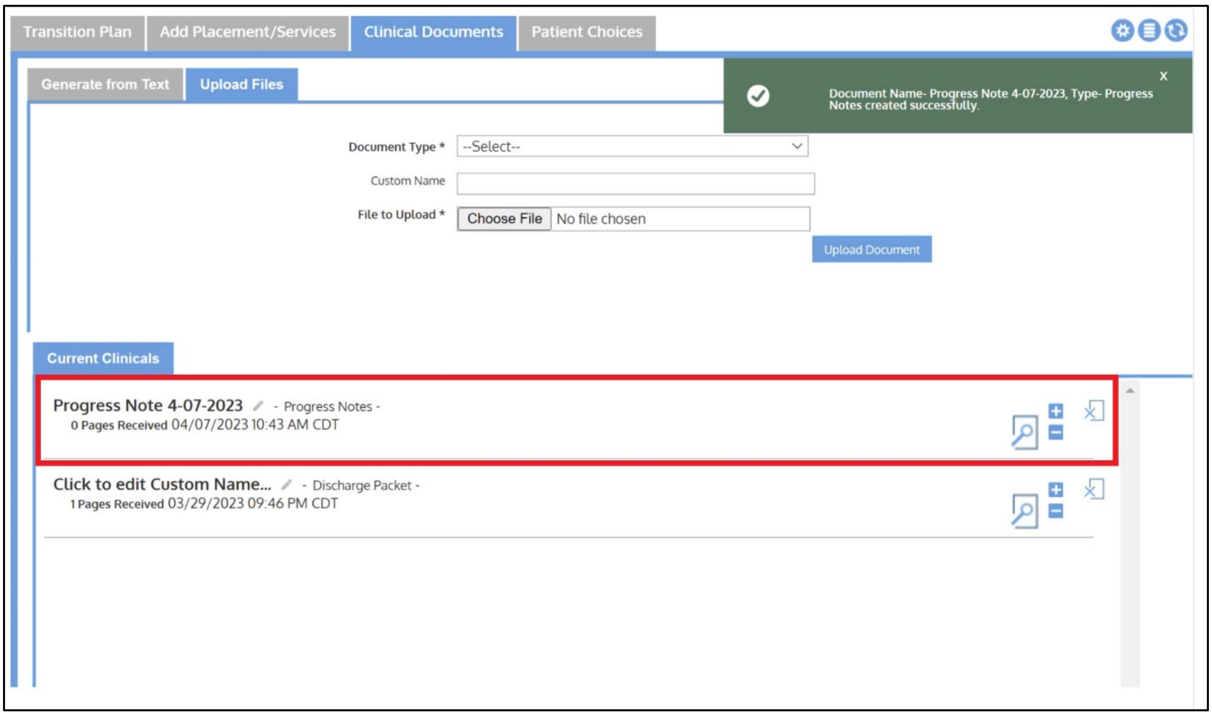
5. Click the **Upload Document** button.

Figure 18. Detail of Upload Document button



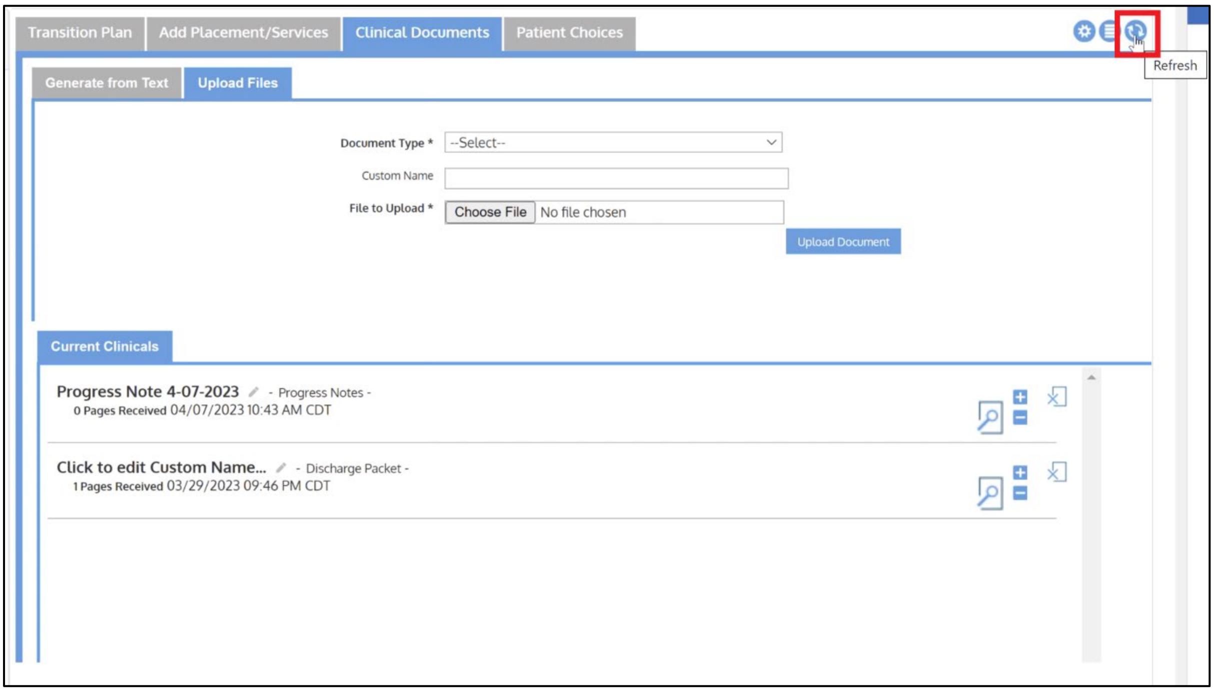
6. The document the user uploaded will appear in the **Current Clinicals** list.

Figure 19. Detail of Uploaded Clinical



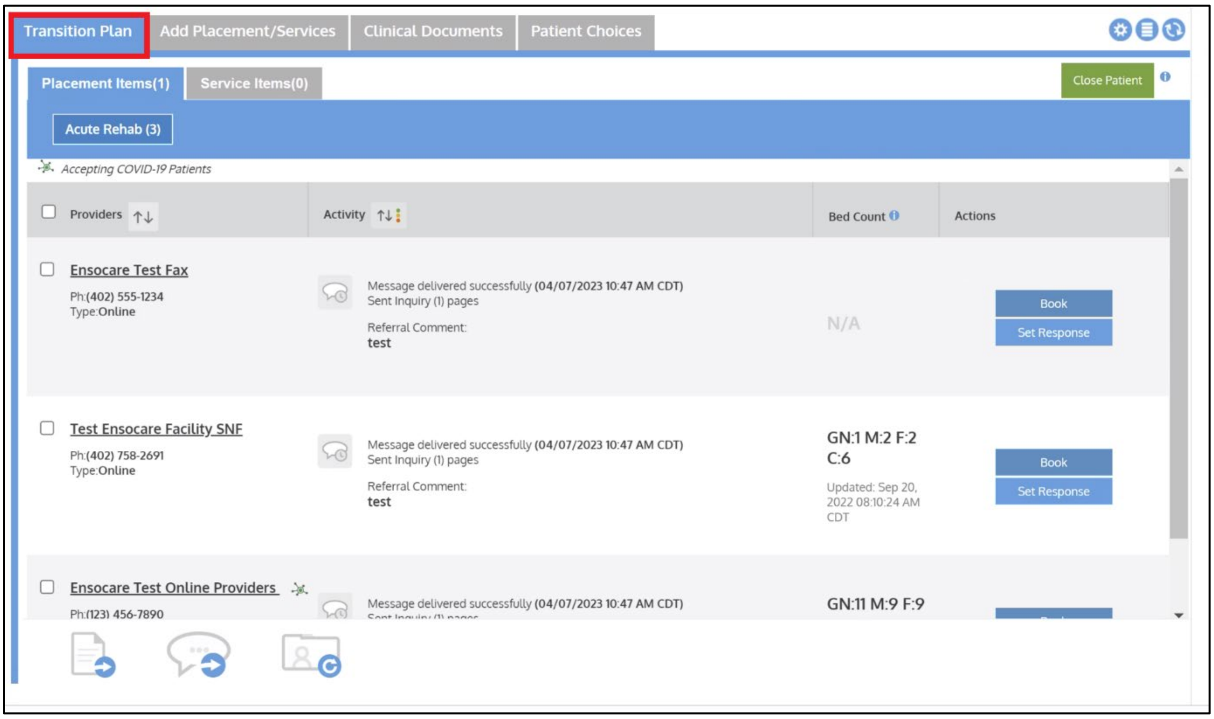
7. Click the <u>Ensocare Transition</u> **Refresh** button in the top-right corner of the screen to display the correct page count, otherwise it will read as zero.

Figure 20. Detail of Refresh button



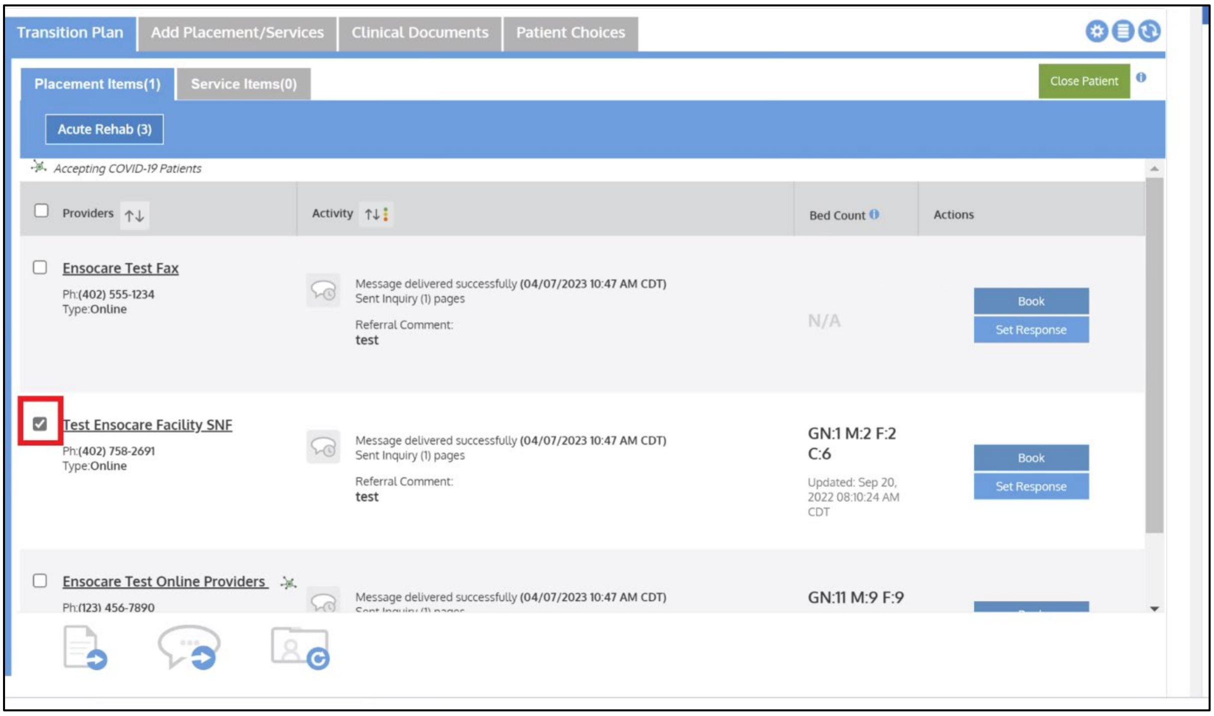
8. After viewing the clinicals, click the **Transition Plan** tab near the top-left corner of the screen.

Figure 21. Detail of Transition Plan tab



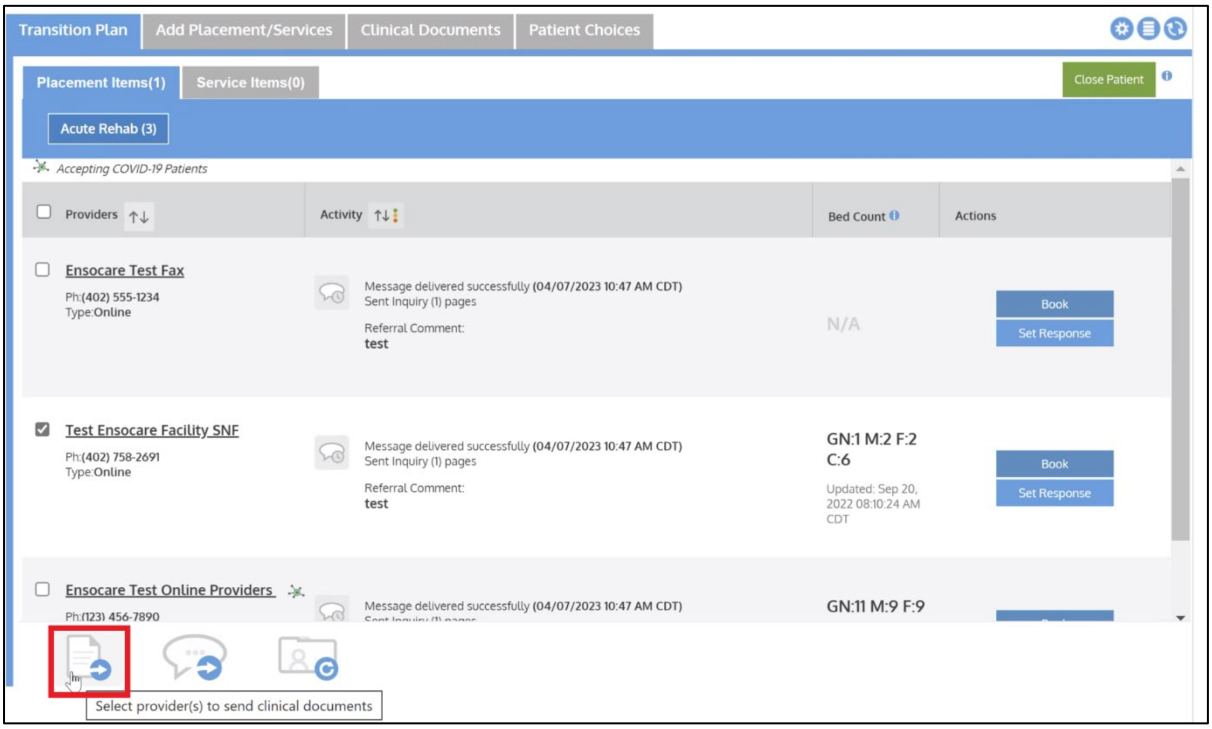
9. Check the box next to one or more facilities to select them to receive the clinicals.

Figure 22. Detail of Selected facility



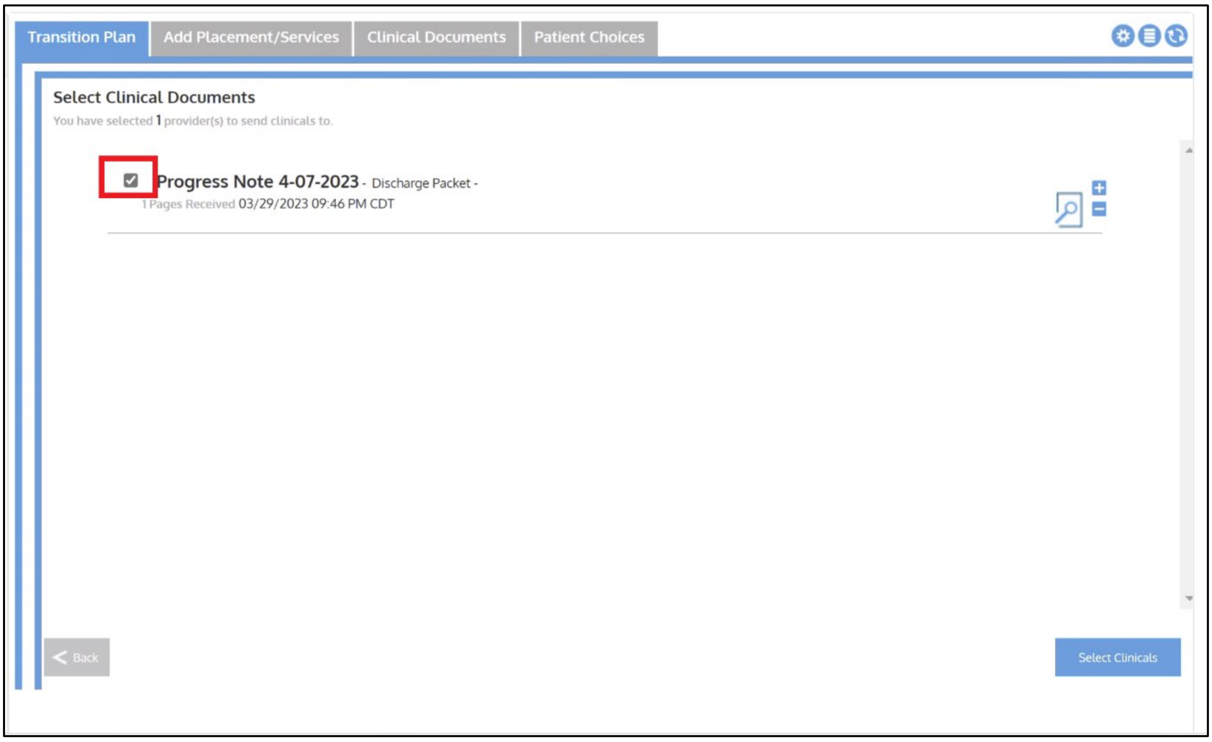
10. Click the **Send Clinicals** icon at the bottom-left corner of the screen.

Figure 23. Detail of Send Clinicals button



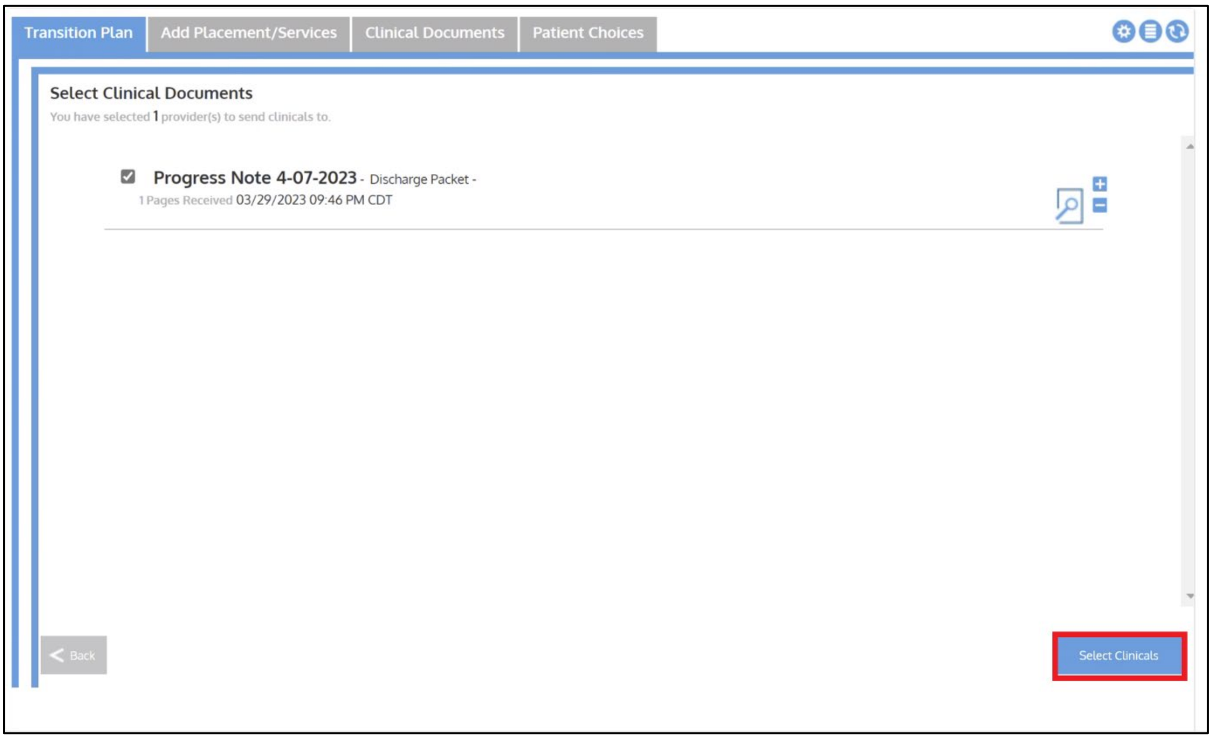
11. Check the box(s) next to the clinical(s) to send.

Figure 24. Detail of Selected Clinical



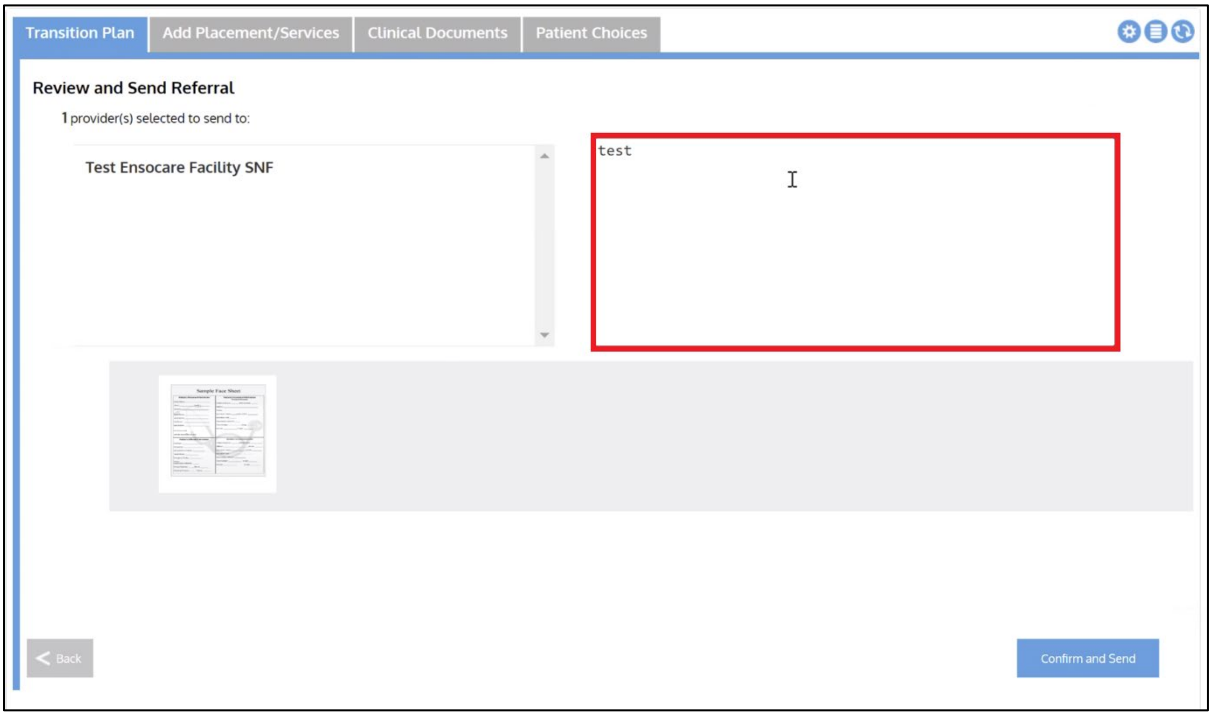
12. Click the **Select Clinicals** button in the bottom-right corner of the screen.

Figure 25. Detail of Select Clinicals button



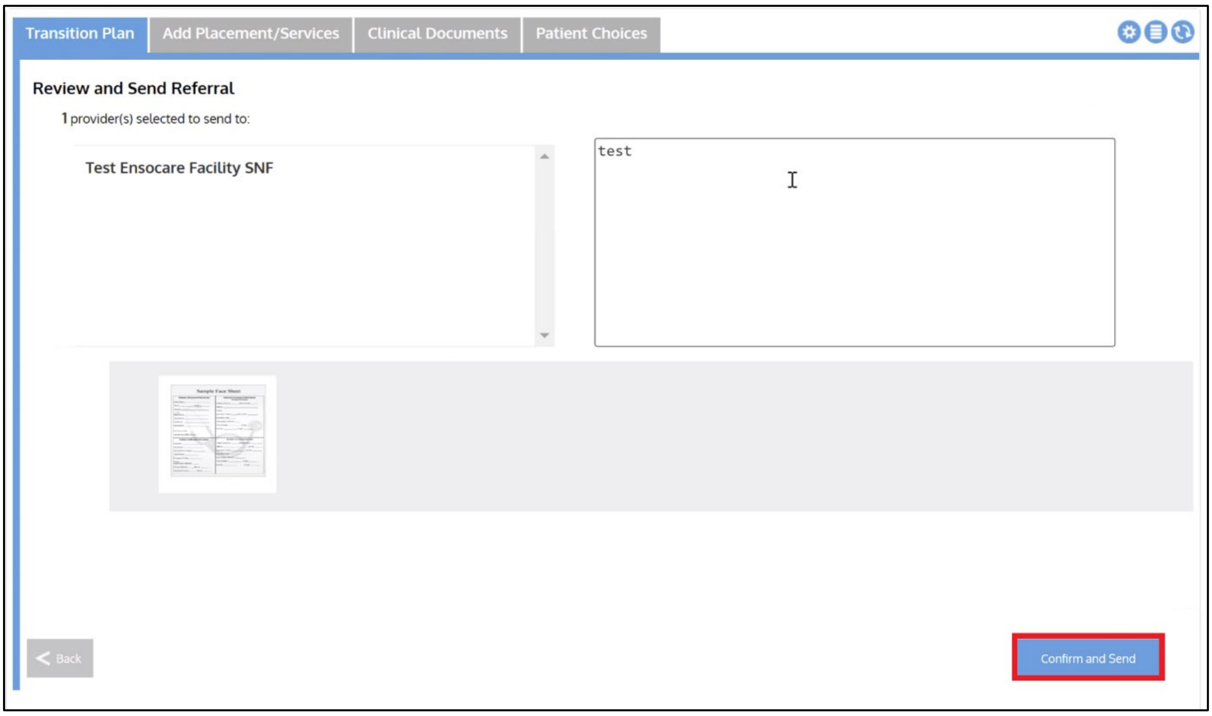
13. Add any notes or comments for the facility in the notes section.

Figure 26. Detail of notes



14. Click the **Confirm and Send** button in the bottom-right corner of the screen.

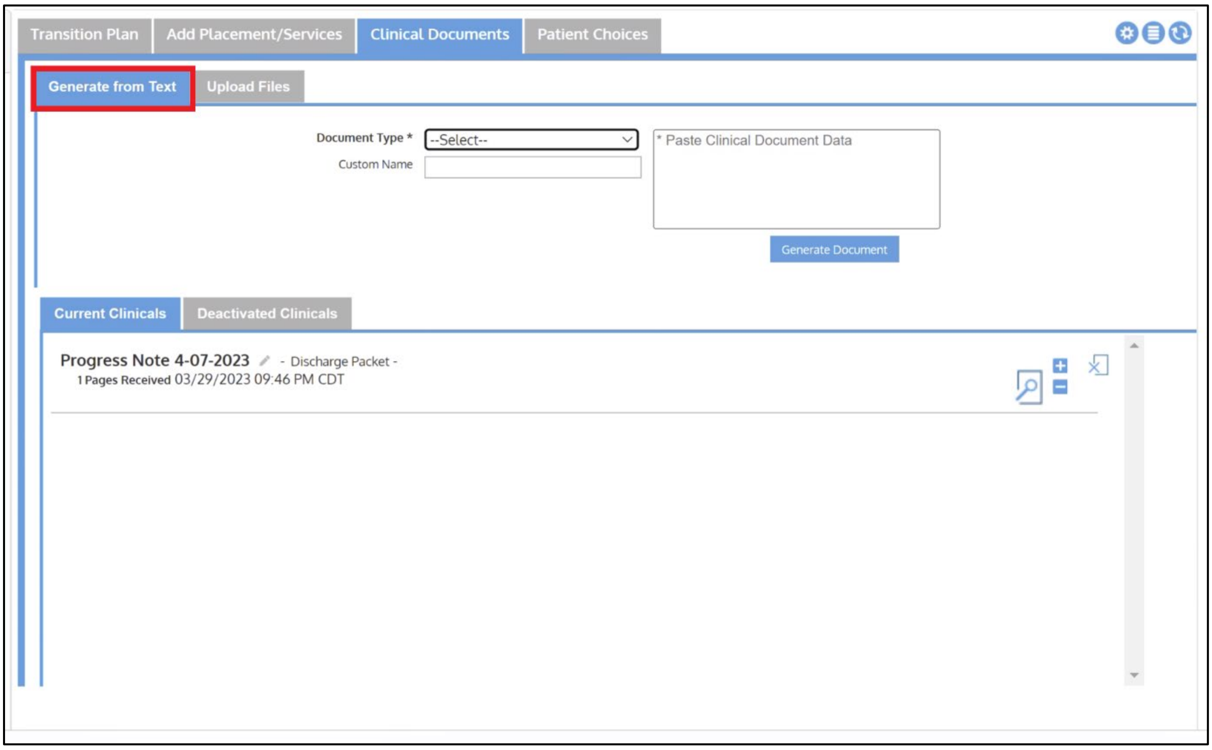
Figure 27. Detail of Confirm and Send button



To add a note using copy/paste text from another source:

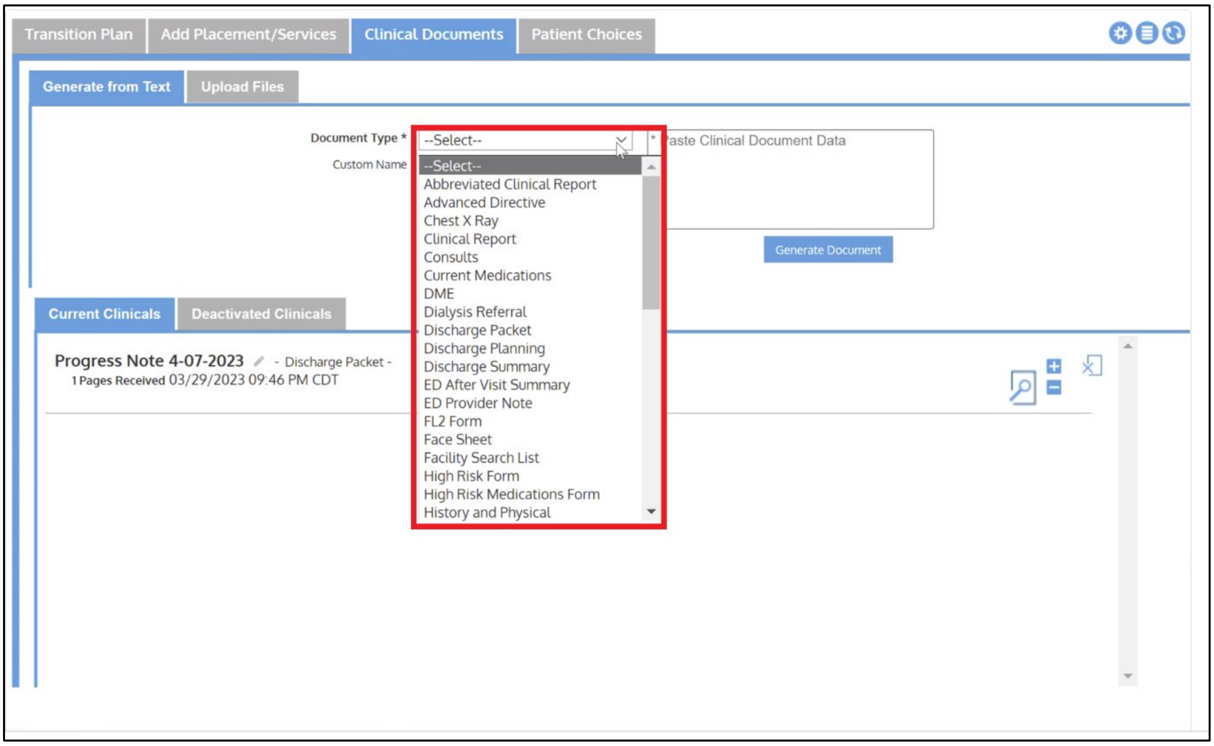
1. Click the **Generate from Text** tab near the top-left of the screen.

Figure 28. Detail of Generate from Text tab



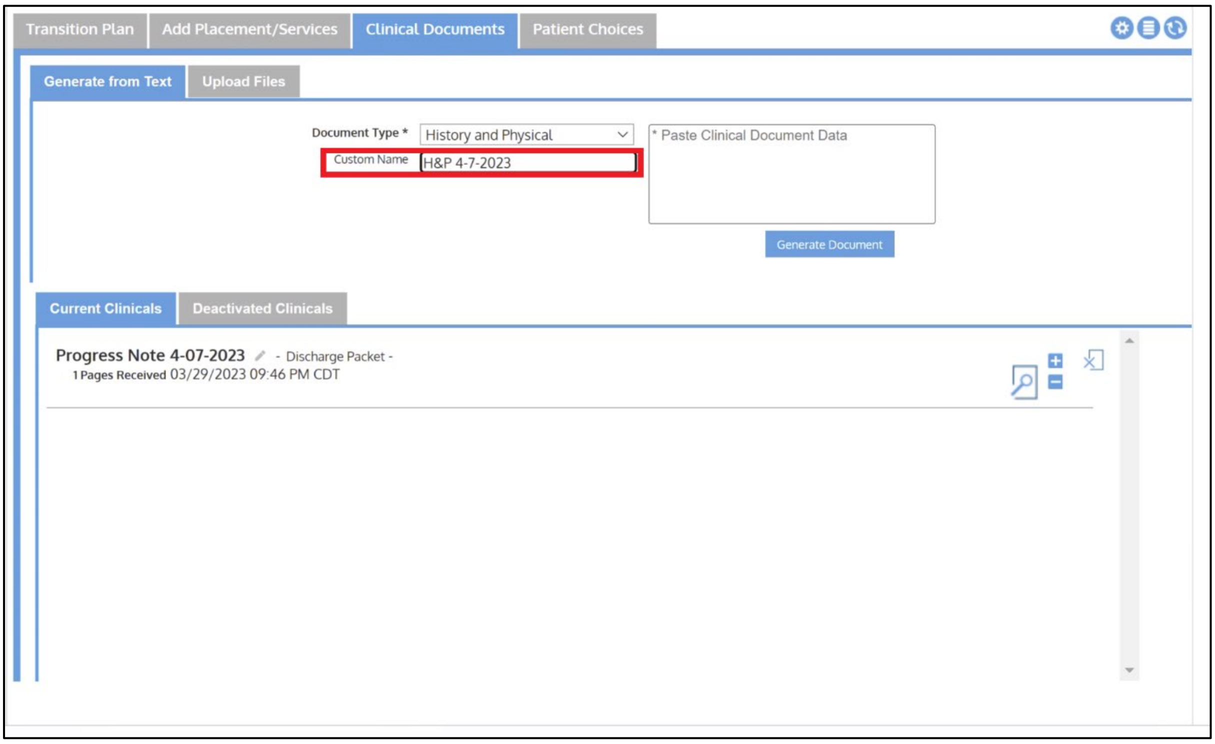
2. Select a **Document Type** from the drop-down list.

Figure 29. Detail of Document Type drop-down list



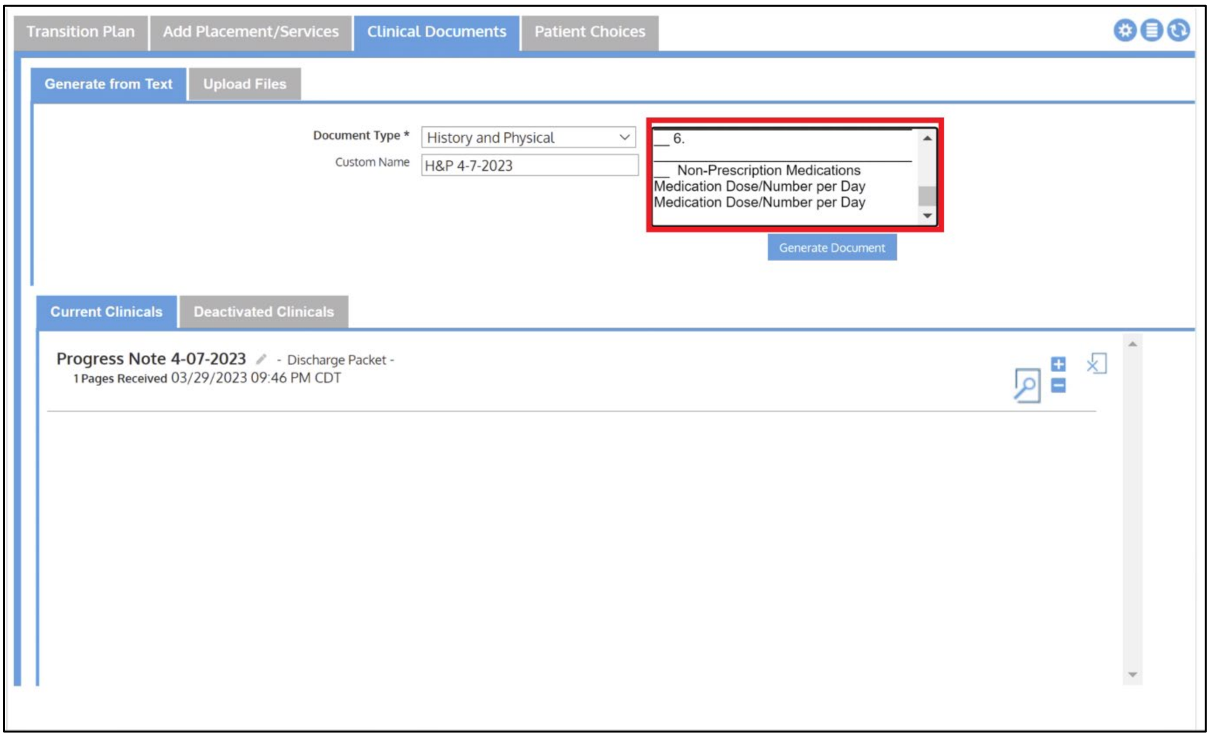
3. Enter a **Custom Name** for the document identification (optional). Otherwise, the name will default to the document type.

Figure 30. Detail of Custom Name



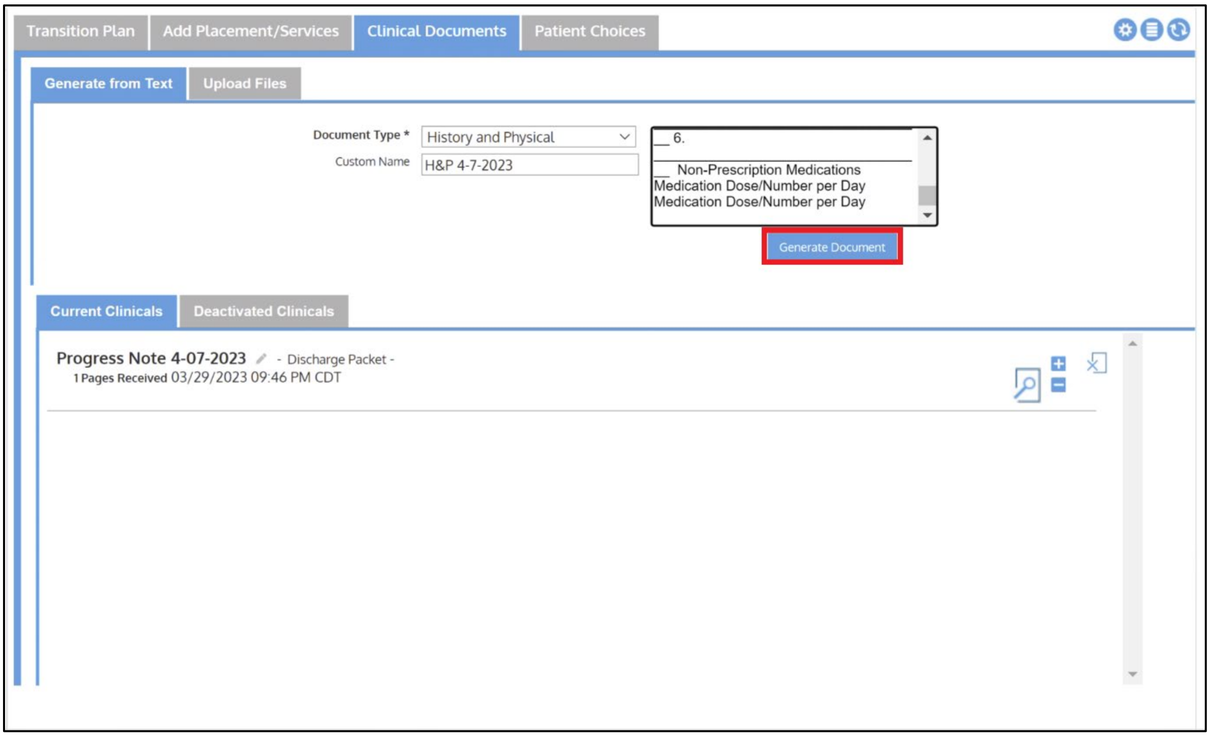
4. Enter a message, or copy and paste text from another source, into the text box.

Figure 31. Detail of text box



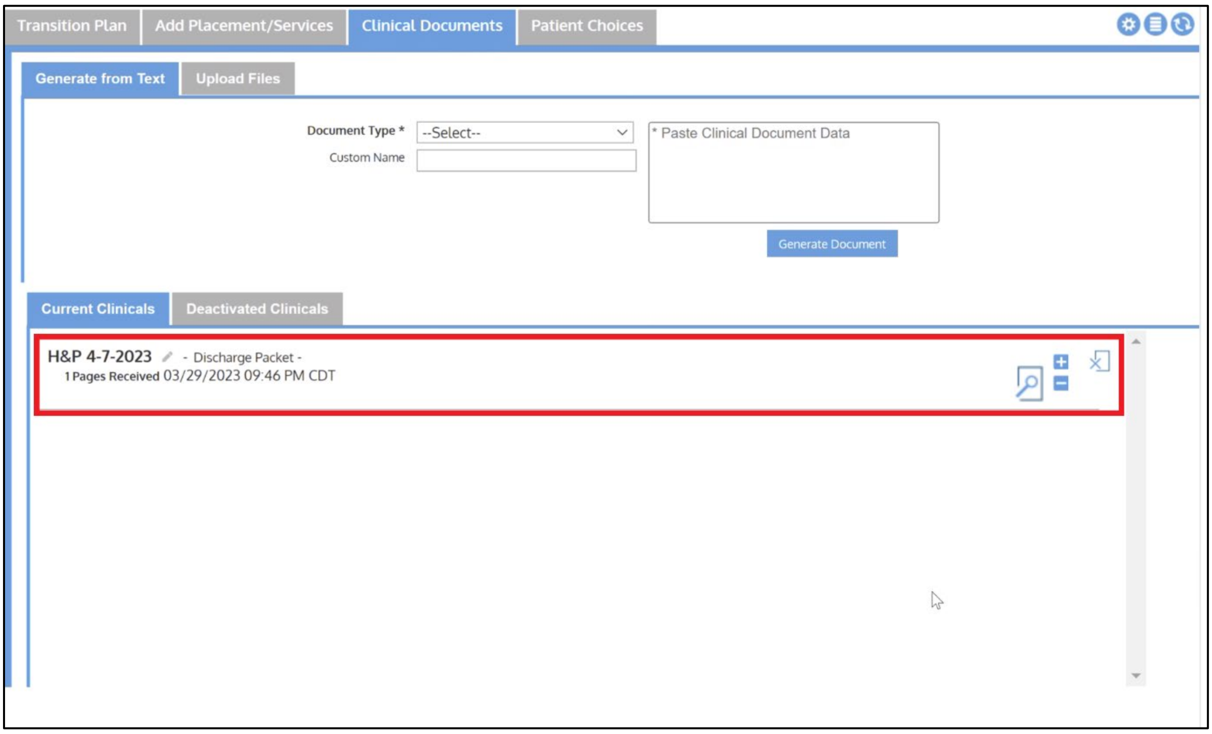
5. Click the **Generate Document** button beneath the text box.

Figure 32. Detail of Generate Document button



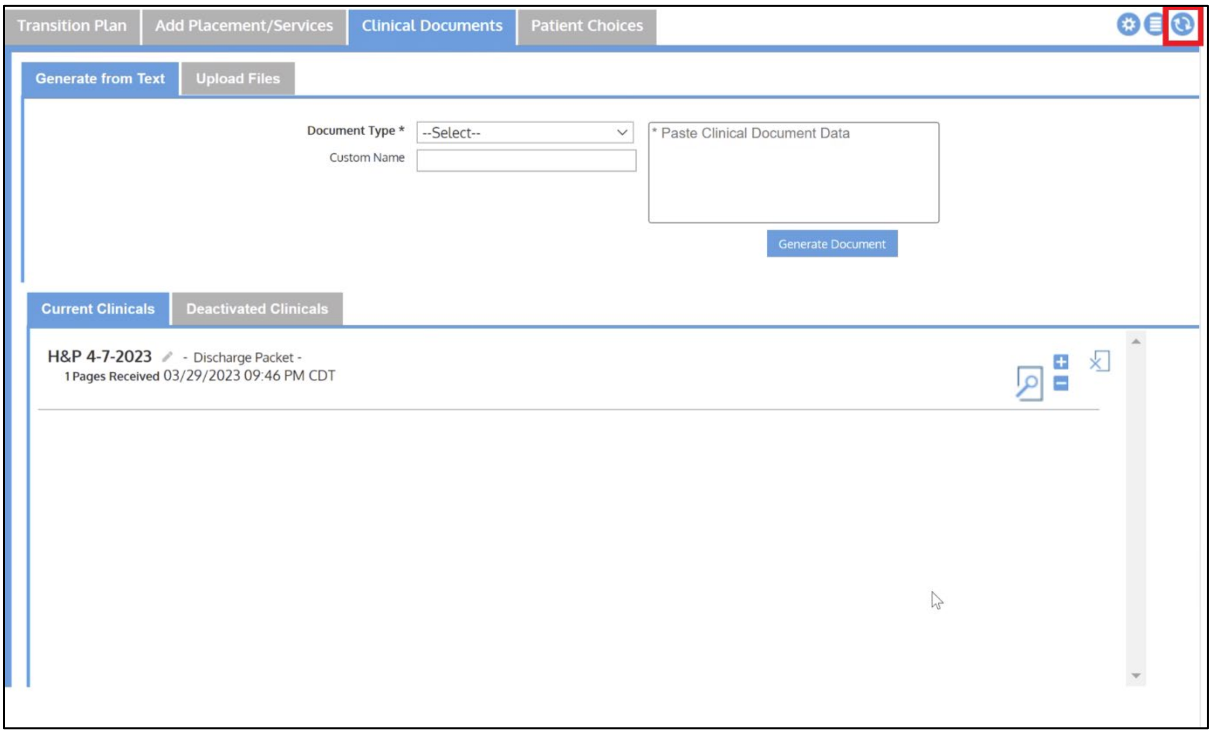
6. The document the user generated will appear in the **Current Clinicals** list.

Figure 33. Detail of generated document



7. Click the **Refresh** button in the top-right corner of the screen to display the correct page count, otherwise it will read as zero.

Figure 34. Detail of Refresh button



3. Add and Send Additional Clinical Documents

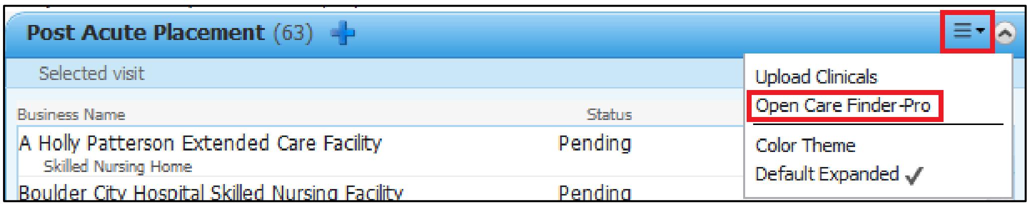
To add clinical information not in a pre-defined packet, see the section **Add Clinical Information that is not in a Pre-Defined Packet and Send to Provider**.

Send Additional Clinicals uploaded in Ensocare

To send additional clinical data that has already been uploaded to Ensocare:

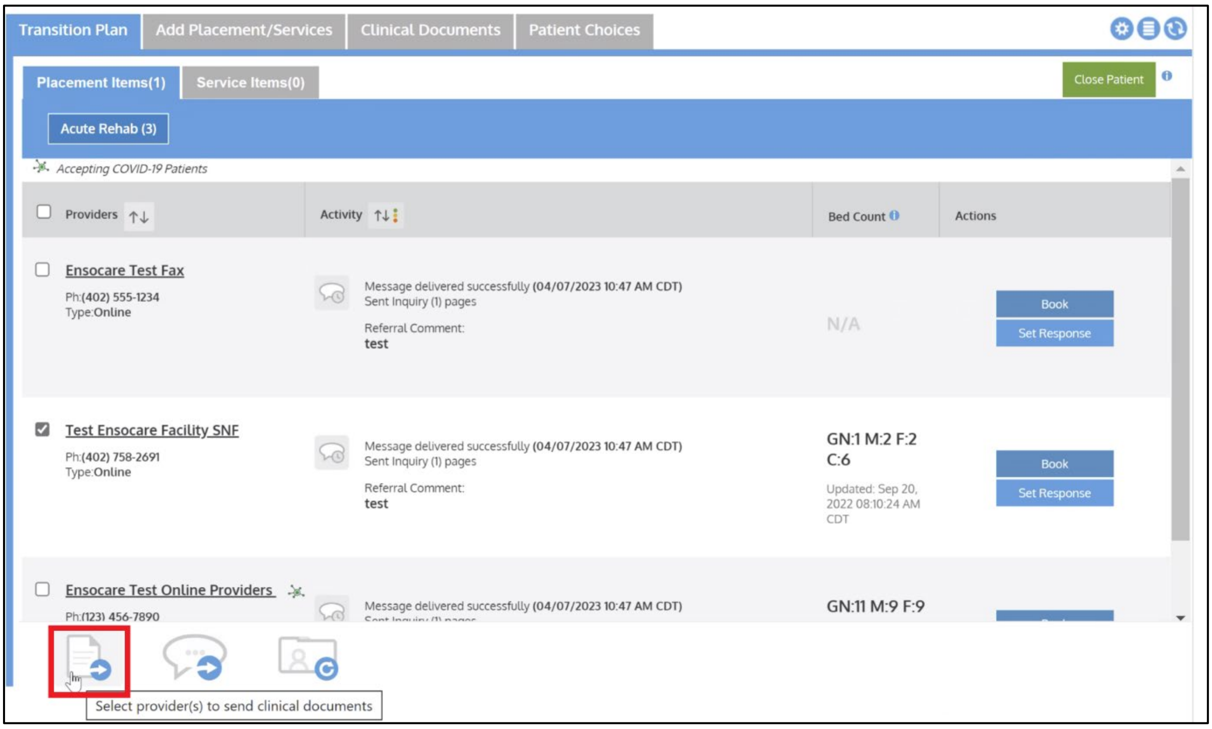
1. Click the hamburger menu and click **Ensocare (Open Care Finder-Pro)** from the drop-down list.

Figure 35. Detail of Open Care Finder-Pro



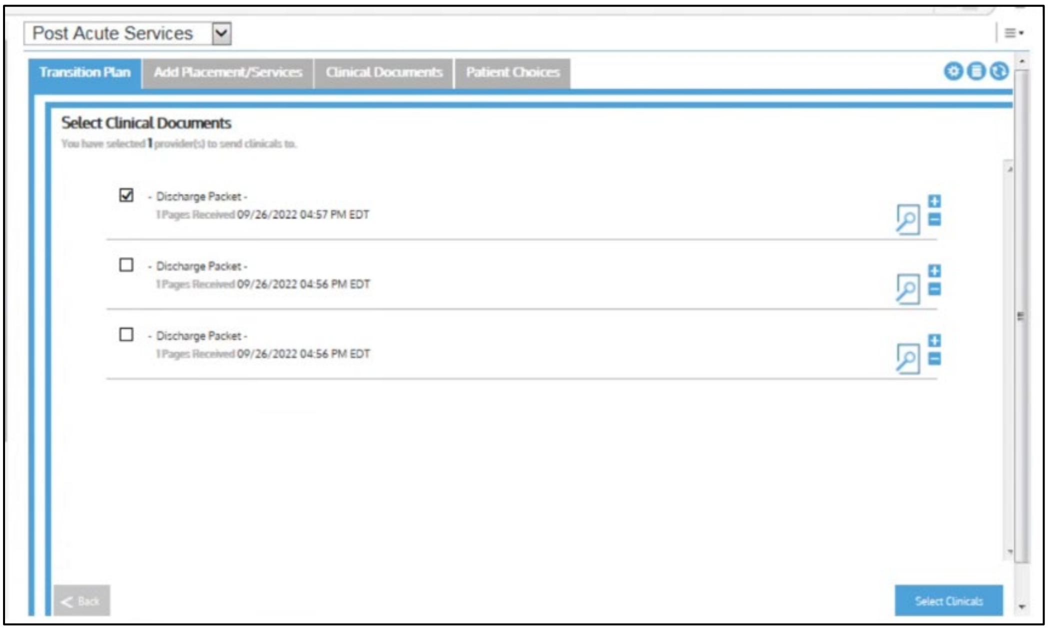
2. Check the box(es) next to the provider(s) the user needs to send additional clinical information and click the **Send Clinicals** icon at the bottom-left corner of the screen.

Figure 36. Detail of Send Clinicals icon



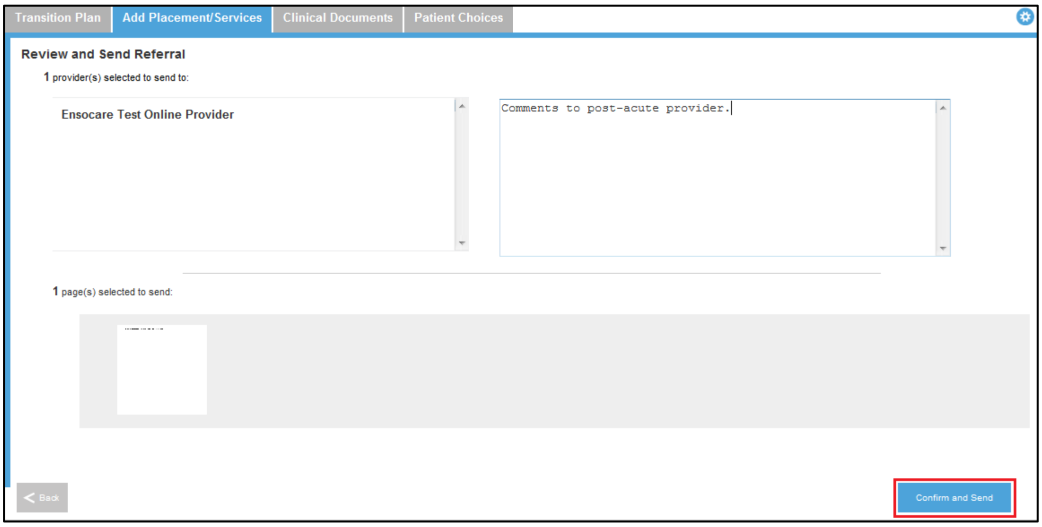
3. Check the box(es) next to the clinical packet(s) to send (the most recent uploads will appear at the top of the list) and click the **Send Clinicals** button at the bottom-right corner of the screen.

Figure 37. Detail of clinicals



4. Click the **Confirm and Send** button at the bottom-right corner of the screen.

Figure 38. Detail of Confirm and Send button

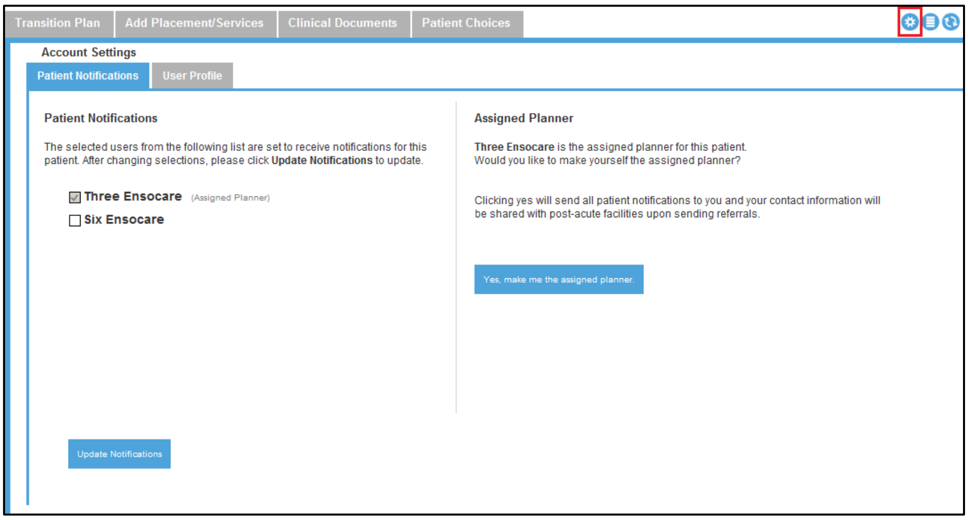


4. Add and Send Patient Referrals

When opening Ensocare (Care Finder-Pro), it will automatically assign the user as the **Assigned Planner** to receive notifications.

If the user is opening a Patient in Ensocare (Care Finder-Pro) that was previously assigned to a different Case Manager, they will be prompted by a dialog box to update notification settings on this Patient. See the **Patient Notifications** section for more information.

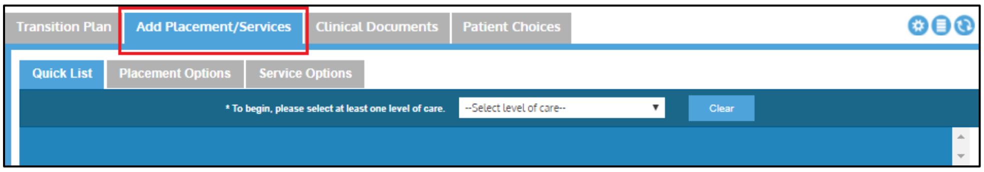
Figure 39. Detail of Settings button



Complete the following steps to send new referrals to post acute placement providers:

1. Click the **Add Placement/Services tab** to add items to the Transition Plan for the Patient.

Figure 40. Detail of Add Placement/Services tab

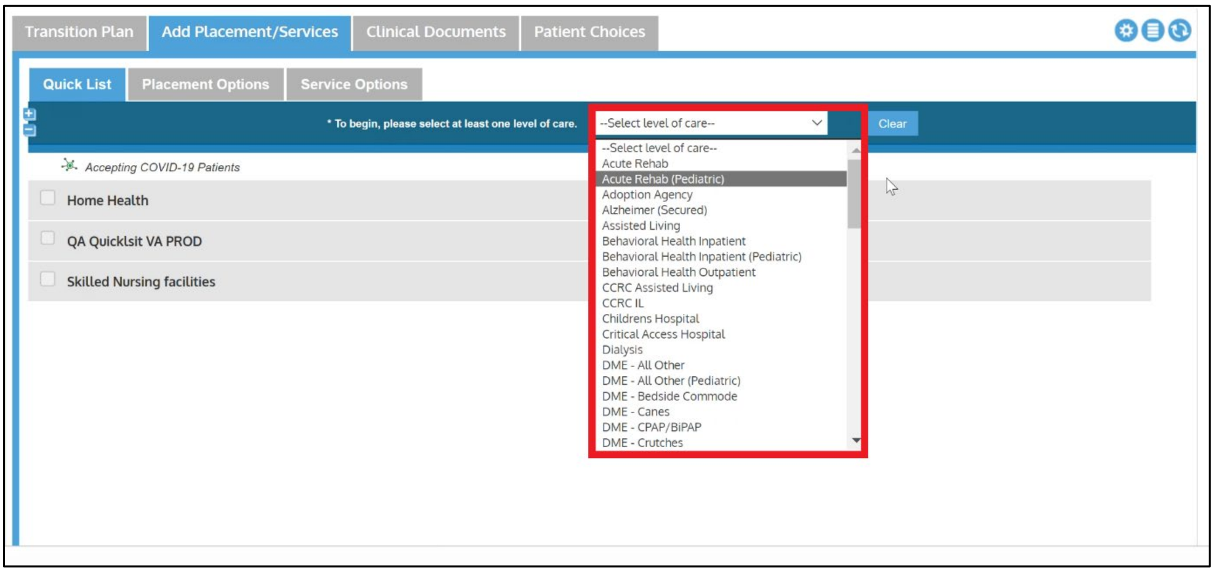


2. Use **Quick List** or **Advanced Search** to find a placement.

Quick List

1. Select the **Level of Care** from the drop-down list.
   (The levels of care are configurable by facility. The image in Figure 41. is an example of what a quick list could look like).

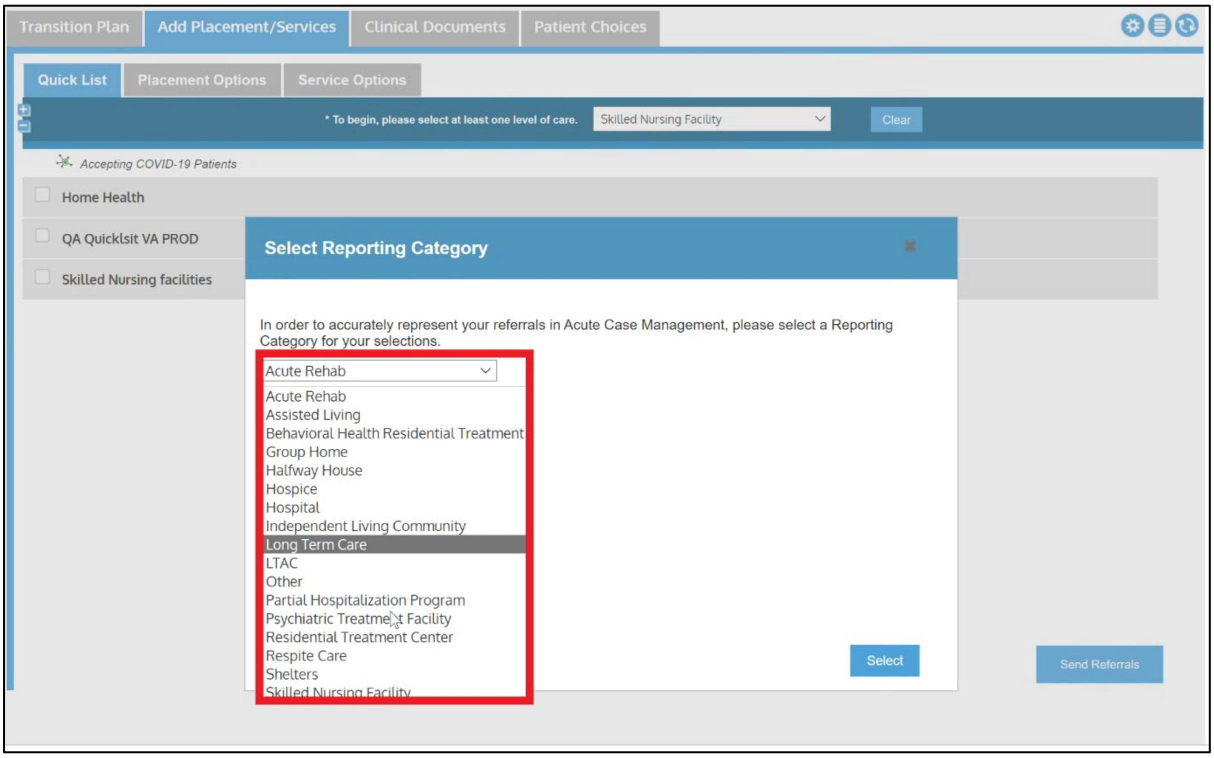
Figure 41. Detail of Level of Care Drop-down



2. Select the **Reporting Category** from the drop-down list,

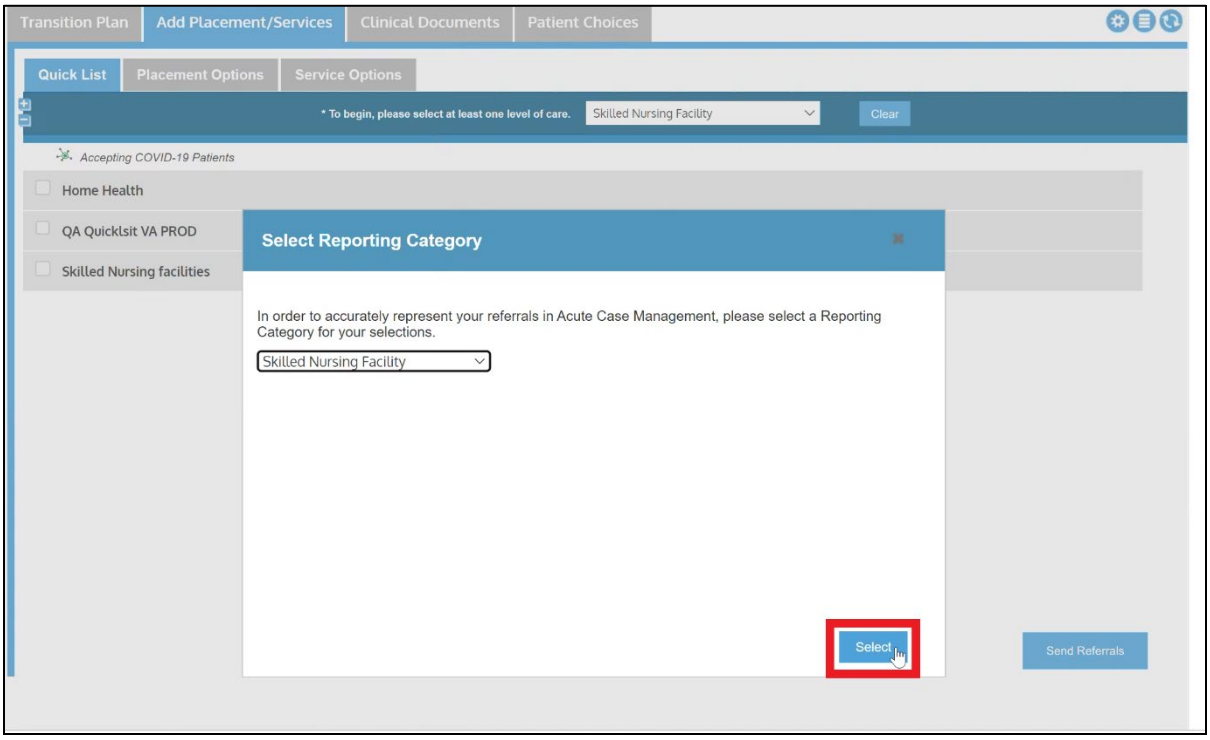
Note: Reporting Categories are based on a Cerner configuration.

Figure 42. Detail of Reporting Category



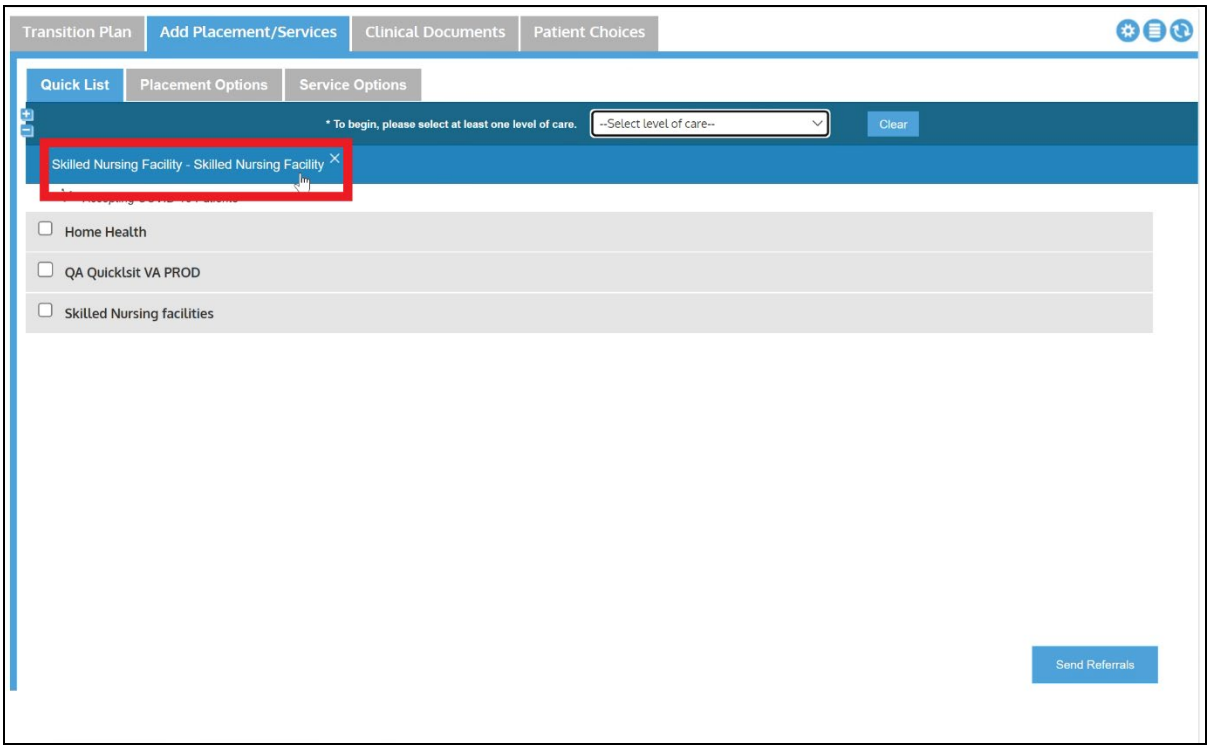
3. Click the **Select** button at the bottom-right corner of the dialog box.

Figure 43. Detail of Reporting Category Select button



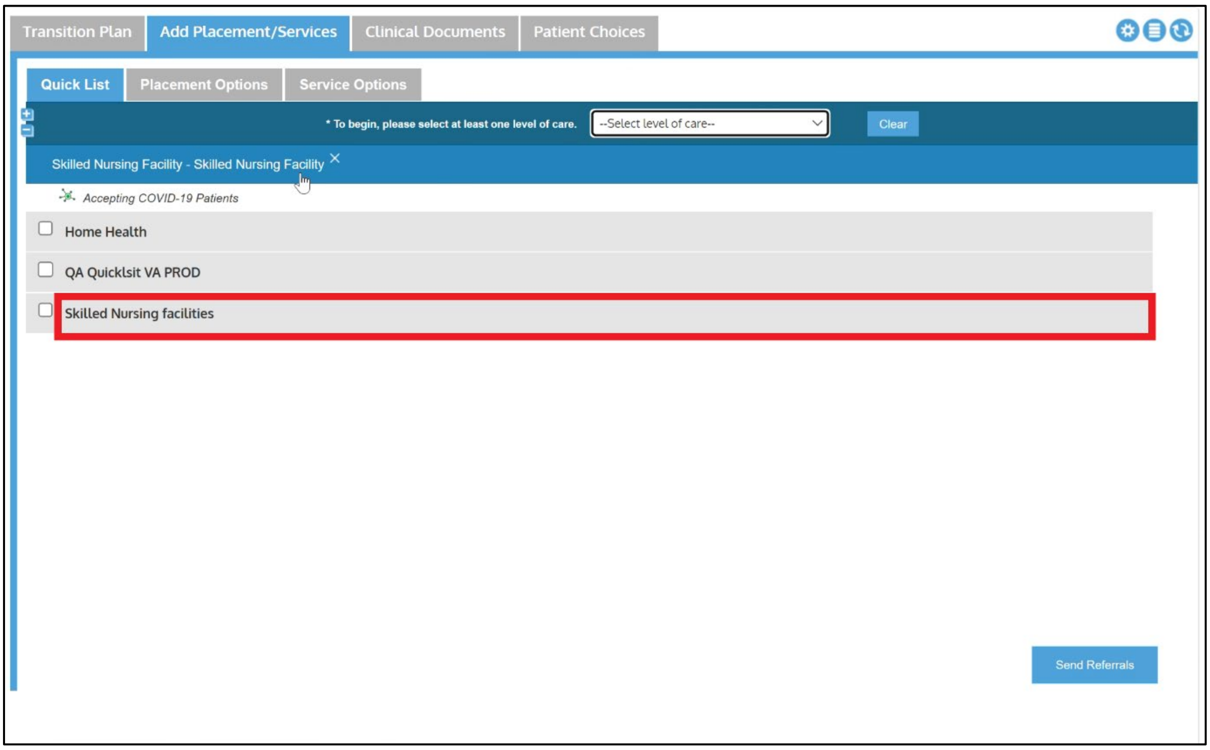
4. The **Level of Care & Cerner Reporting Category** will appear in the banner beneath the level of care drop-down list.

Figure 44. Detail of Level of Care & Cerner Reporting Category



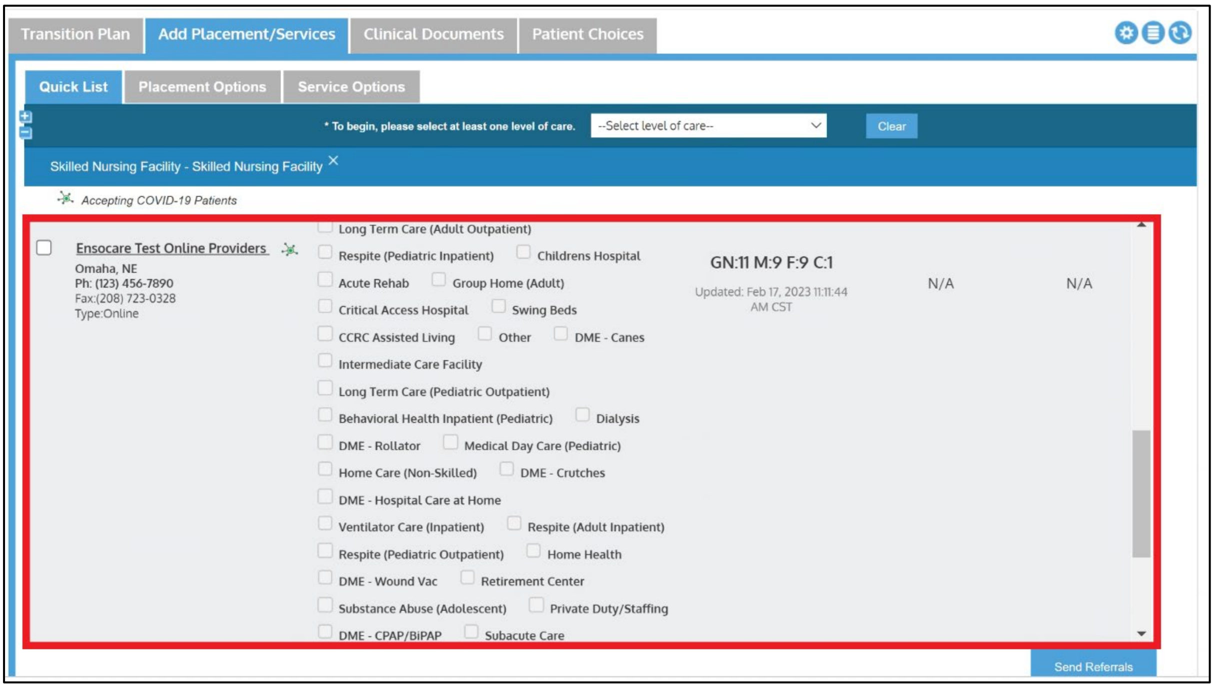
5. Click the **Quick List** category (gray bar) of providers to select from. <u>Do not check the box</u> as this selects all facilities in that category.

Figure 45. Detail of Quick List Category



6. The **Quick List** category will expand to show post acute providers within the **Quick List**.

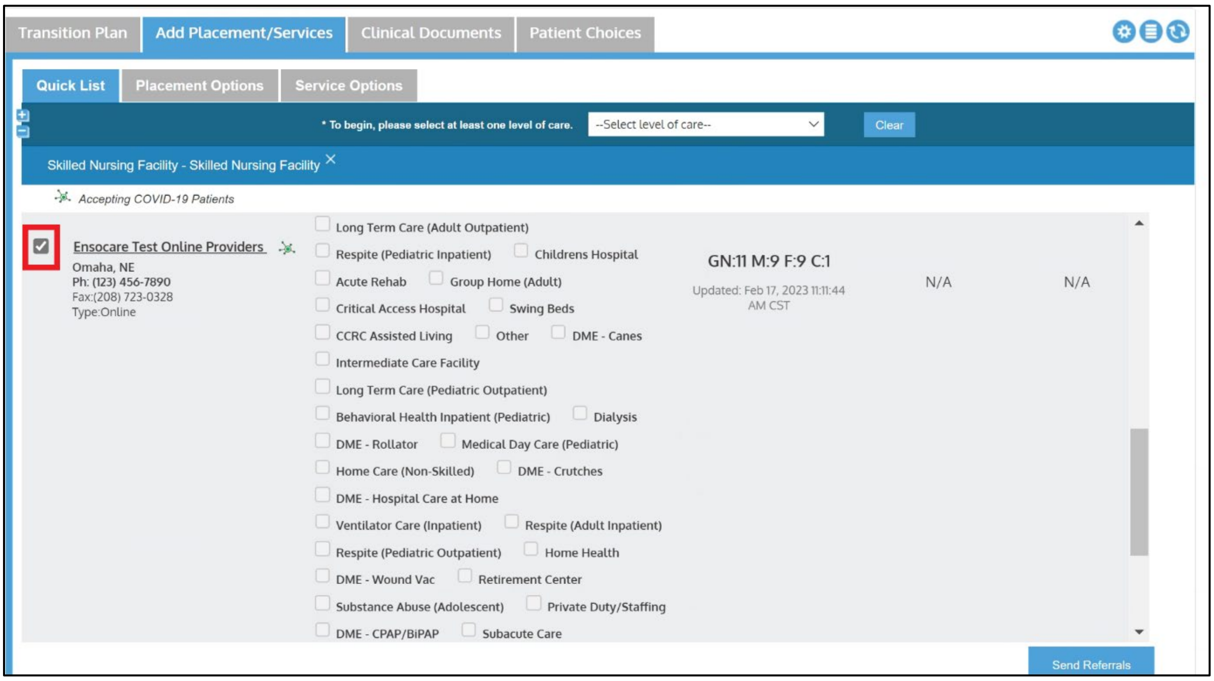
Figure 46. Detail of Quick List category bar providers



7. Select providers by checking the boxes to the left of the provider's name.

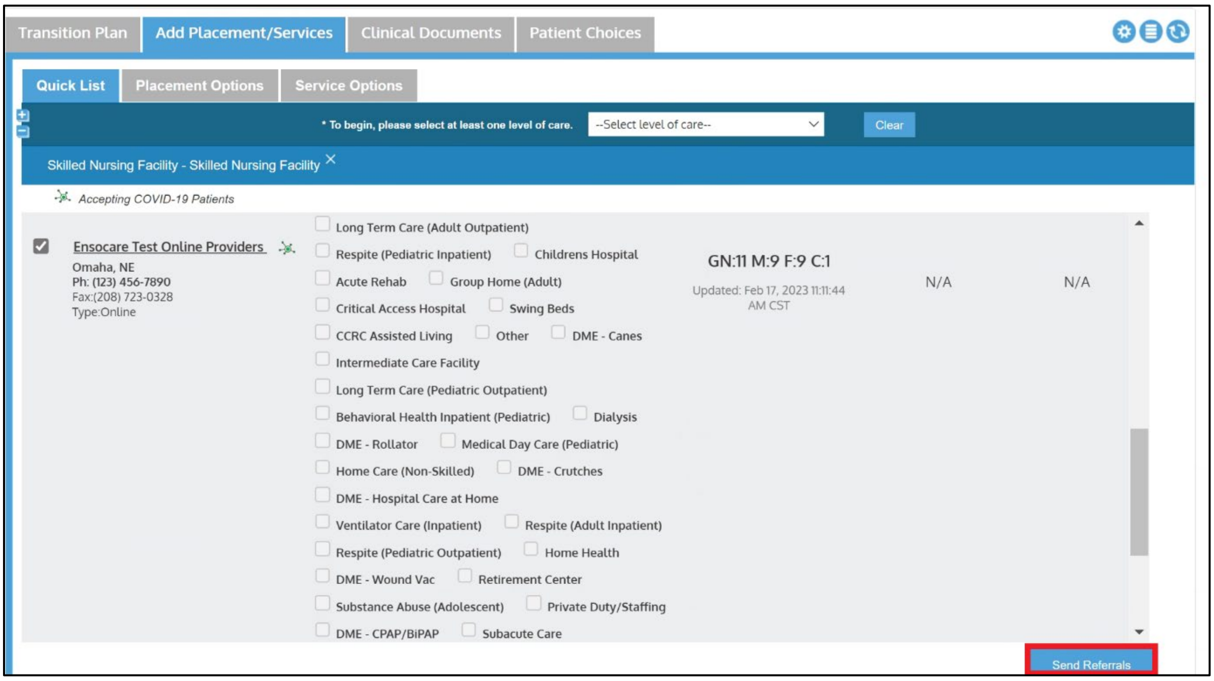
Note: If the user checks the box next to the category, it will select all providers in that Quick List category.

Figure 47. Detail of Check for the provider



8. After the user clicks on the check boxes for the providers, click the **Send Referrals** button in the bottom-right corner of the screen.

Figure 48. Detail of Send Referrals button



9. Select the clinical data to send by checking the box to the left of the packet and click the **Rush Send** button.

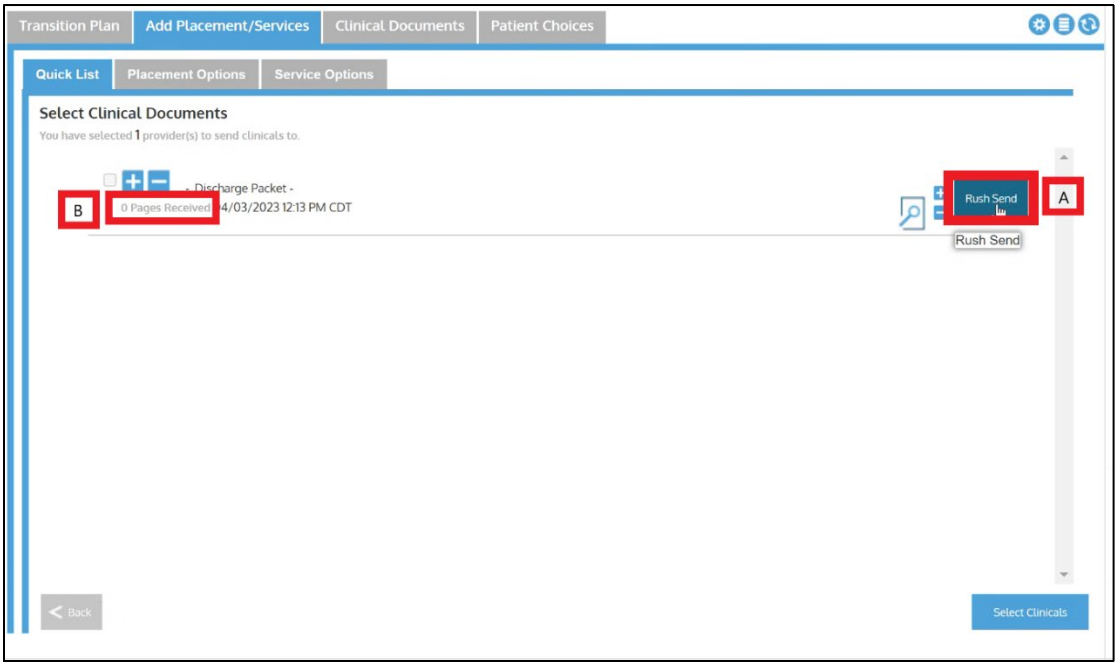
Rush Send [A in Figure 49] allows the user to send a partial packet of what has been received at that time. The number of pages received [B in Figure 49] can be found beneath the Discharge Packet text on the screen.

After the entire packet has been received, checking the box next to the discharge packet will send all pages.

Click the **Plus and Minus** button to expand or collapse the clinicals to show or hide page thumbnails.

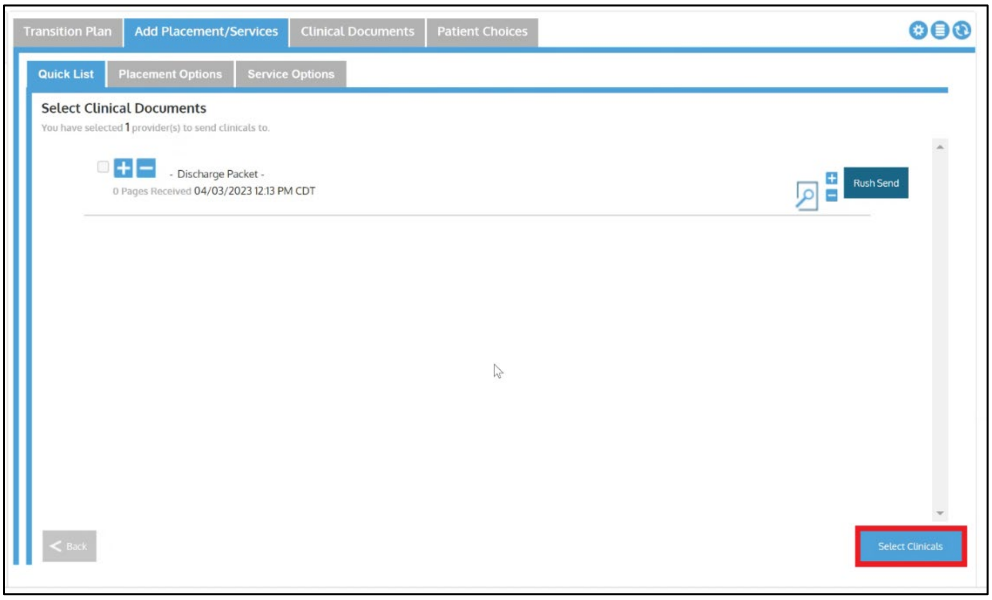
Click the **Search** button to view the entire clinical document in a separate window.

Figure 49. Detail of Rush Send button and number of pages received



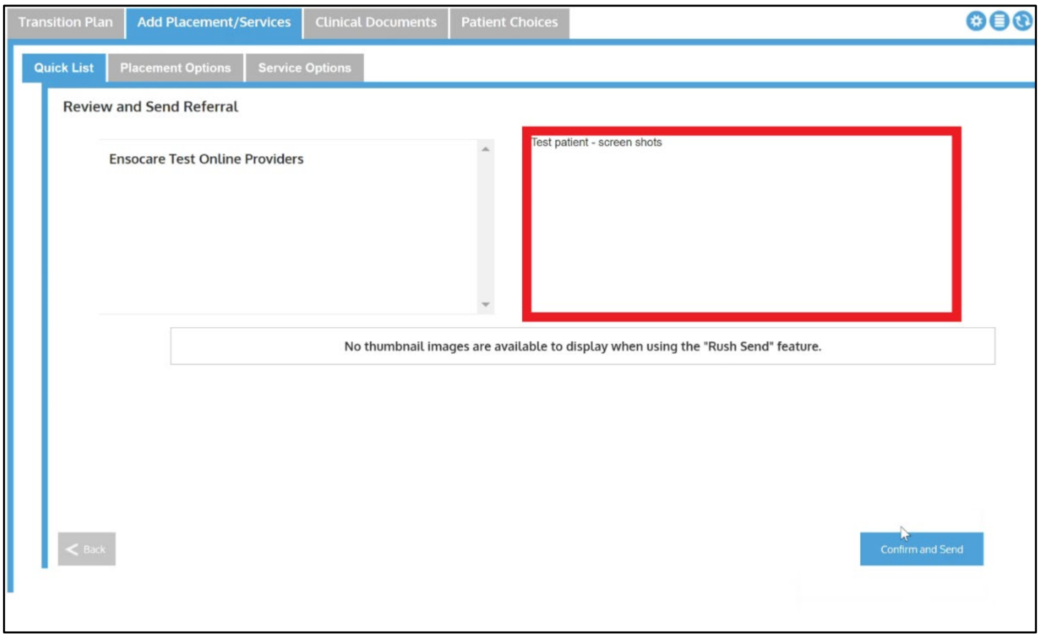
10. Click the **Select Clinicals** button in the bottom-right corner of the screen.

Figure 50. Detail of Select clinicals button



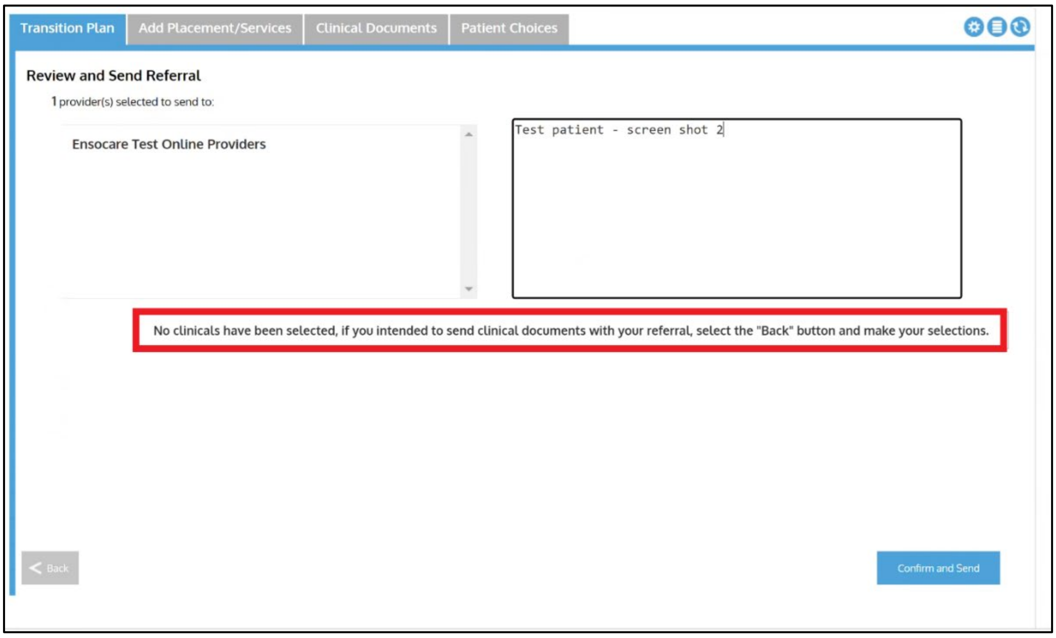
11. Review post acute providers and clinical information to ensure the user has chosen the correct providers and documents.
12. Add any notes to the post acute providers the user needs attached to the referrals in the free text box.

Figure 51. Detail of Free Text box



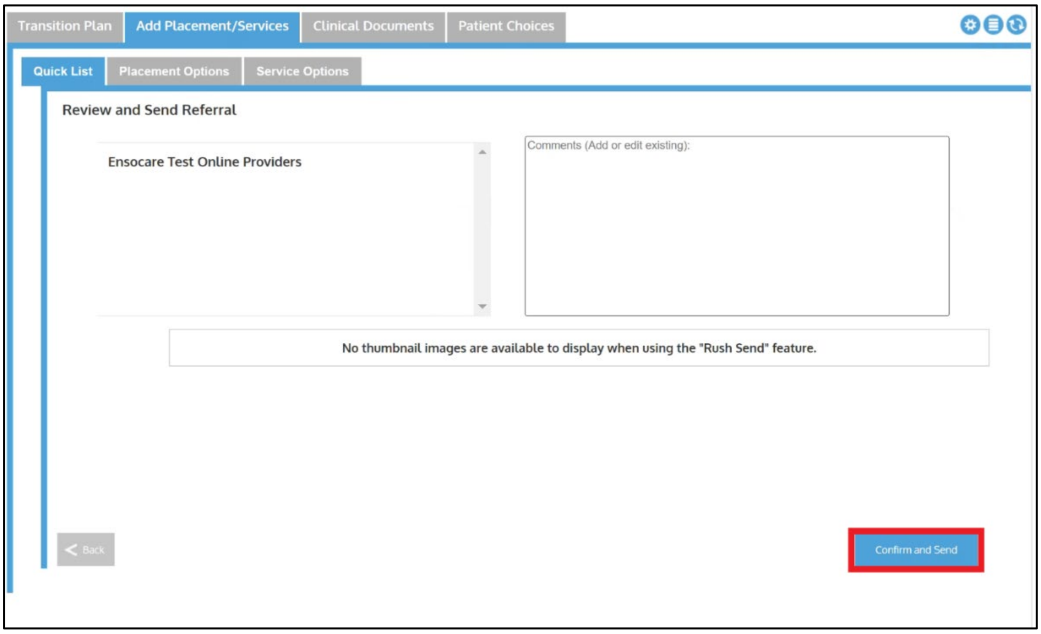
13. Verify that there are clinicals attached. If no clinicals were selected, the message below will appear.

Figure 52. Detail of No Clinicals message



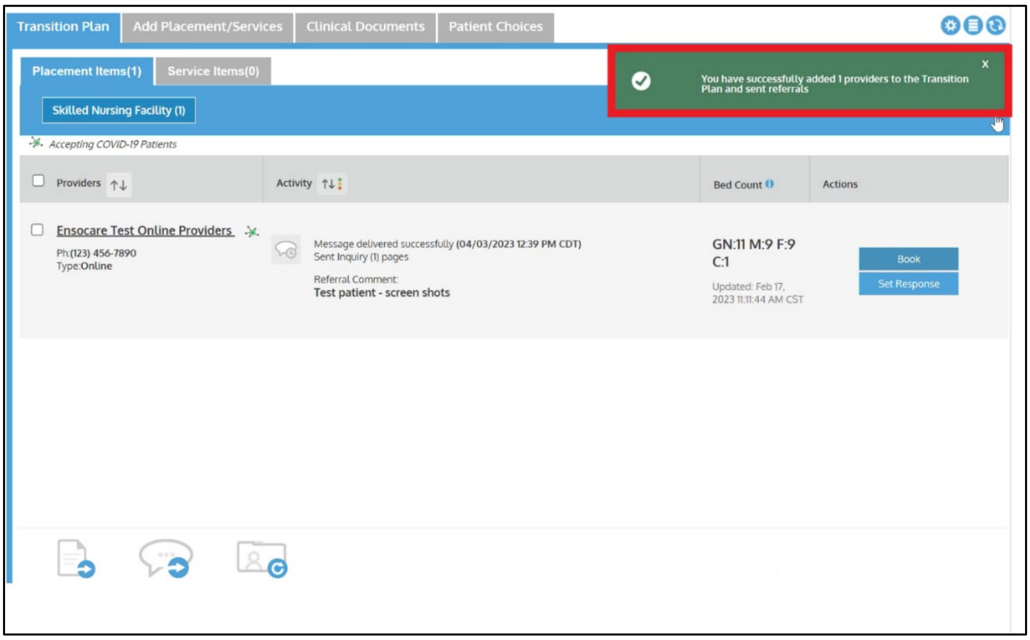
14. Click the **Confirm and Send** button at the bottom-right corner of the screen.

Figure 53. Detail of Confirm and Send button



The referrals have been sent and will appear in the **Transition Plan** for the Patient.

Figure 54. Detail of Transition Plan success message



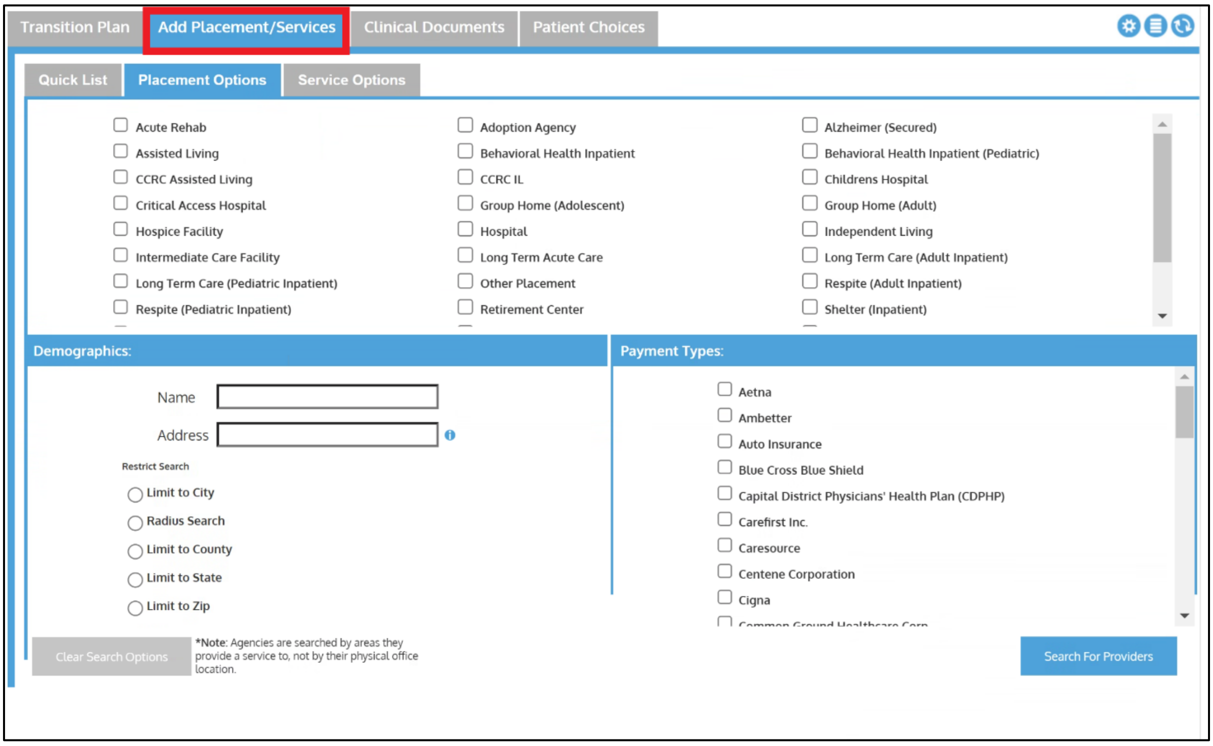
Note: Click anywhere in the green box to close it.

15. Review the **Transition Plan** for details on any inquiries and previous inquiries sent.
16. The **Post Acute Placement** or **Post Acute Service** component has updated to reflect that there are Pending referrals at the facilities the user just sent clinical information.
    - Responses of **Accepted**, **Declined**, or **Considering** populate automatically as providers respond to the referral.

Advanced Search

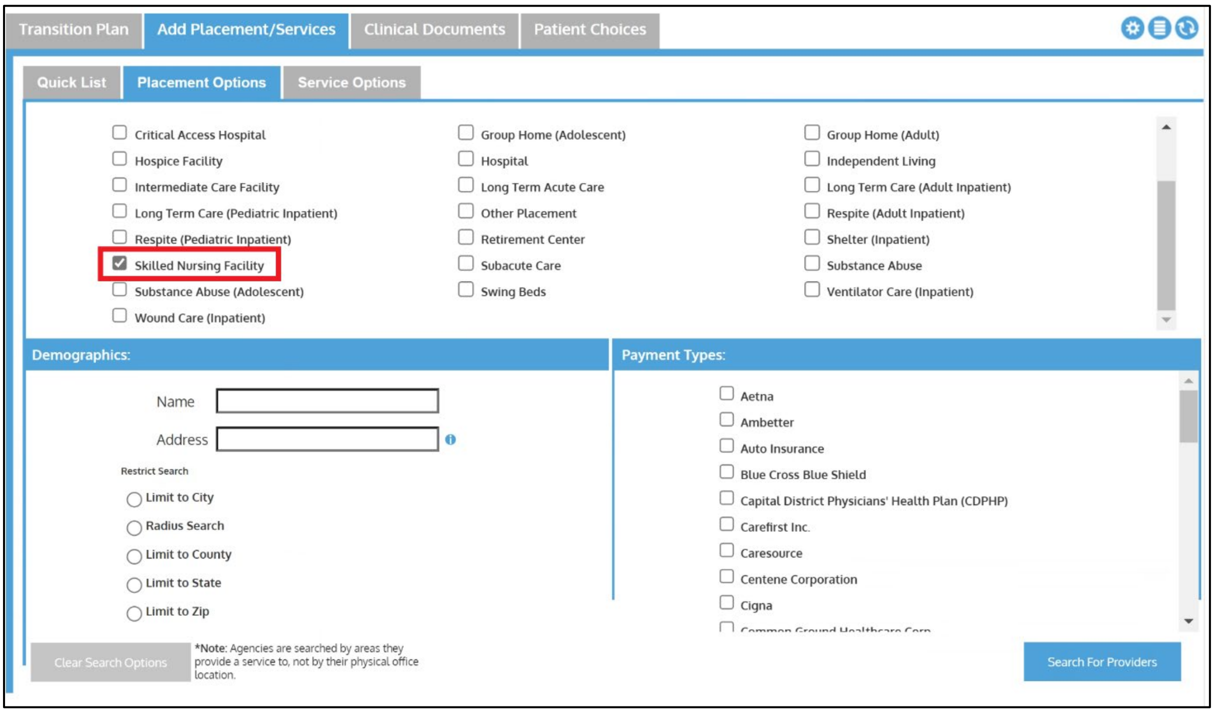
1. From the **Add Placement/Services** tab at the top of the screen, click **Placement Options** for <u>bed placement</u> or **Service Options** for <u>outpatient services</u>.

Figure 55. Detail of Add Placement/Services tab



2. Select the levels of care to fulfill for the Patient.

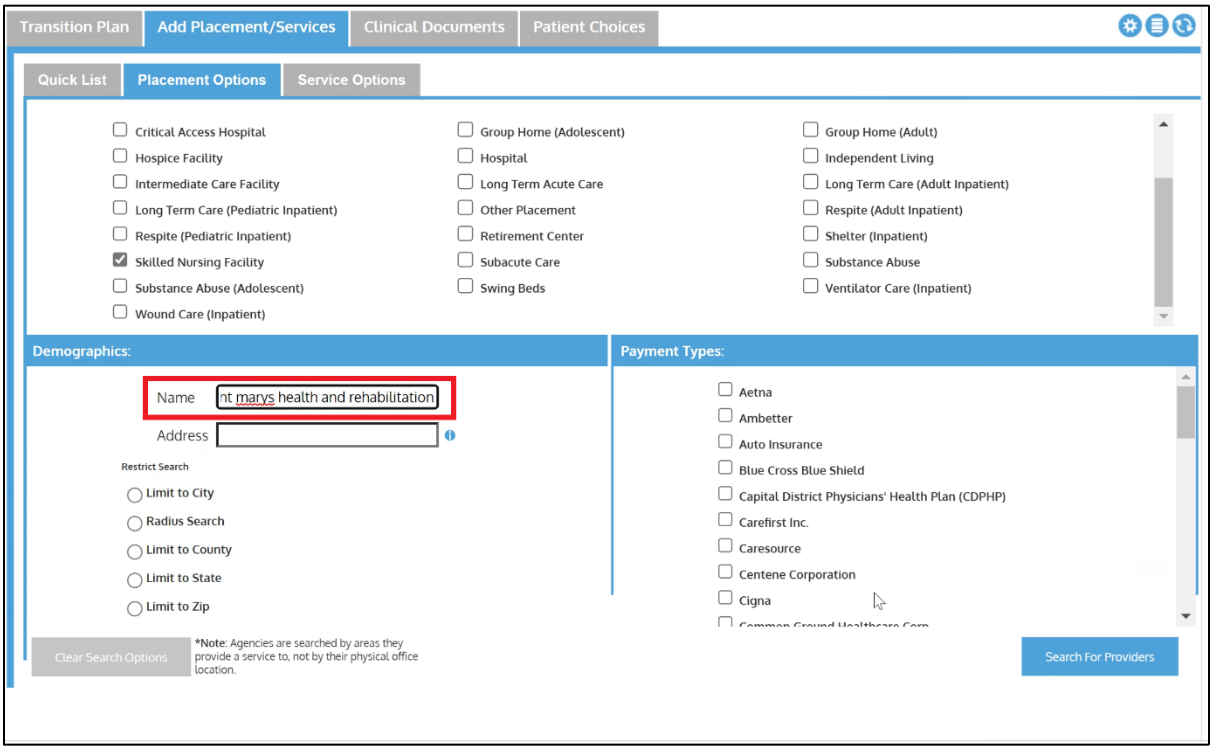
Figure 56. Detail of Level of care



There are two ways to use advanced search: **name** and/or **address**.

1. To search by name, type the facility **Name** in the field at the bottom part of the screen.

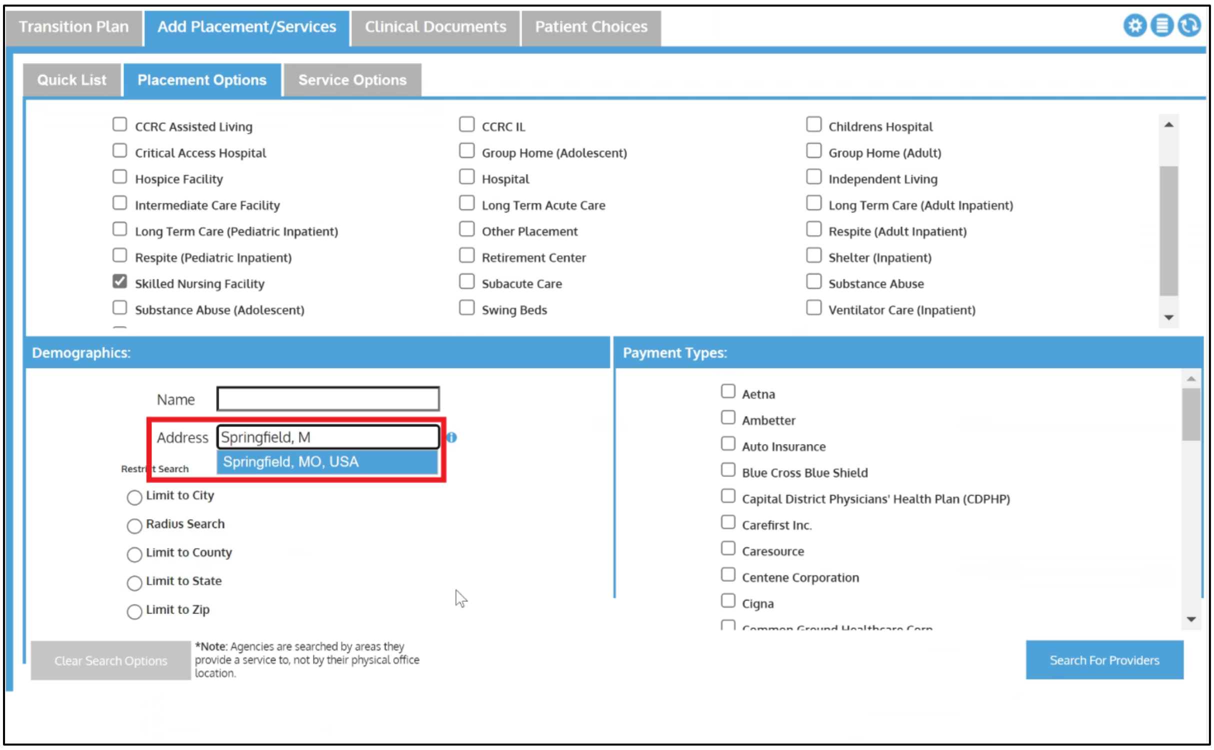
Figure 57. Detail of Name Search



2. To search by address, type the address in the **Address** field at the bottom part of the screen.

Note: Once the user has started entering the Address search criteria, Ensocare Transition will autofill as they type and suggest an address.

Figure 58. Detail of Autofill

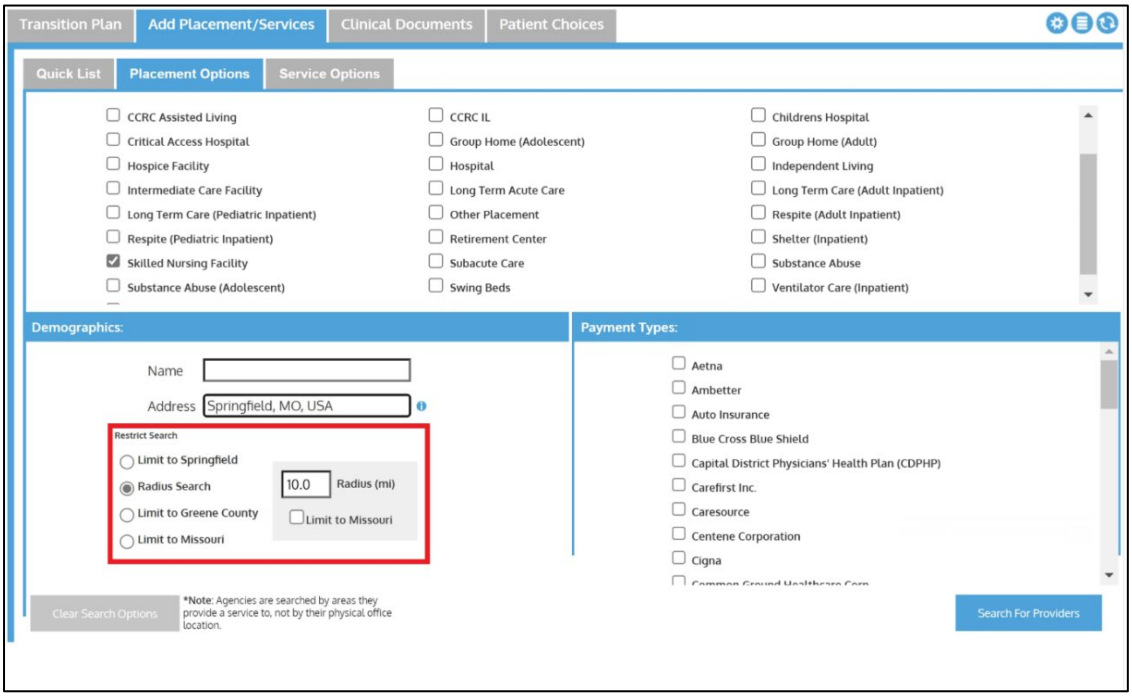


Select the correctly formatted address. Once selected, the search will allow the user to change the parameters.

The user must enter the county or zip code into the **Address** field and select the corresponding radio button to search by county or zip code served.

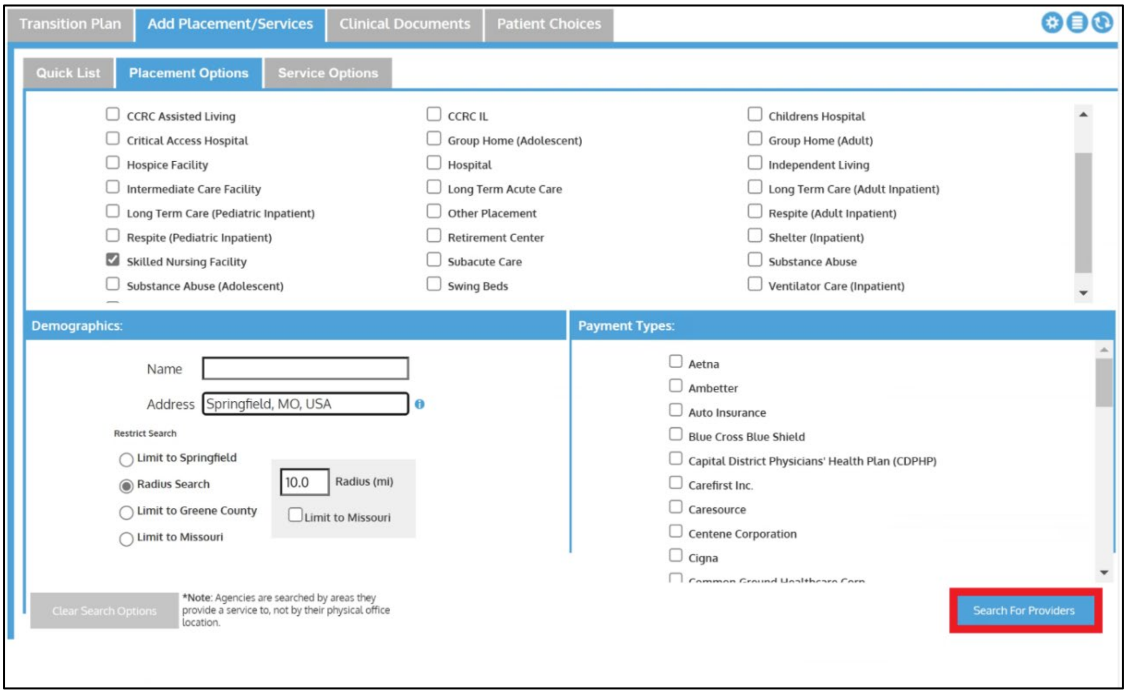
> **Note:** Providers can update the counties and zip codes that they service. The search defaults to a 10-mile radius around what was typed into the Address search, but this can be changed.

Figure 59. Detail of Selected option and Radius search



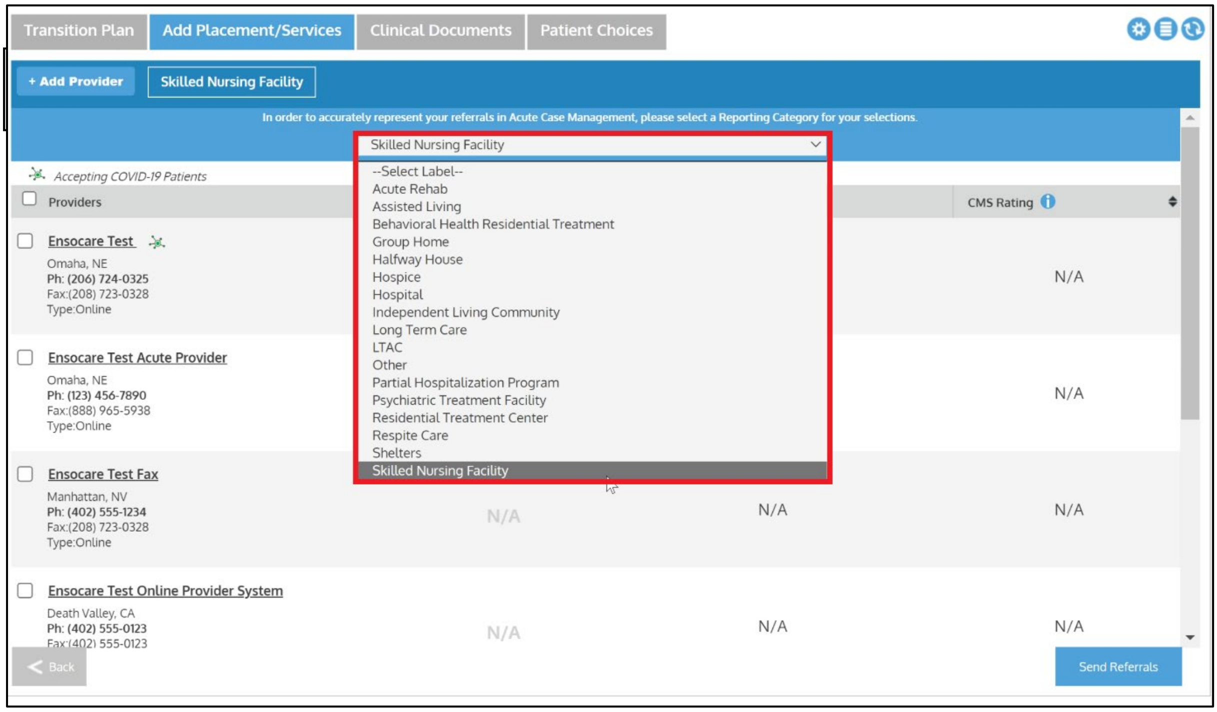
3. Click the **Search for Providers** button in the bottom-right corner of the screen.

Figure 60. Detail of Search Providers Button



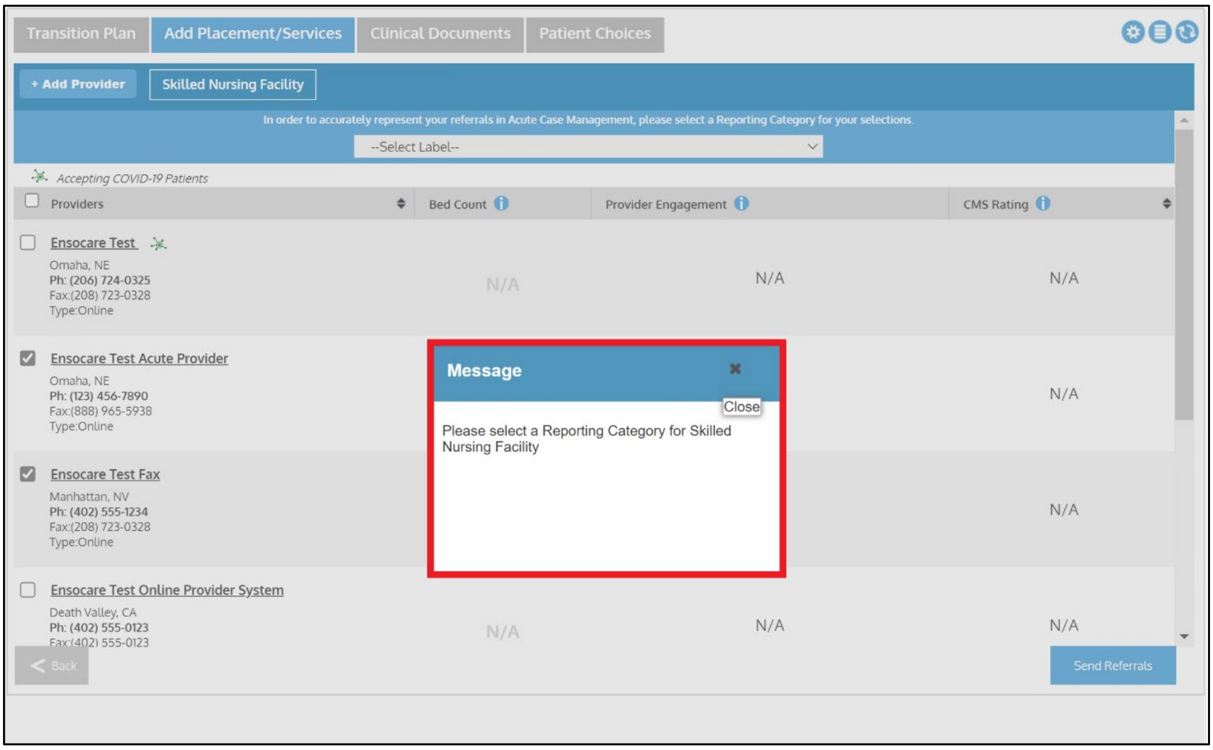
4. Select the **reporting category** from the drop-down list.

Figure 61. Detail of Reporting Category drop-down list



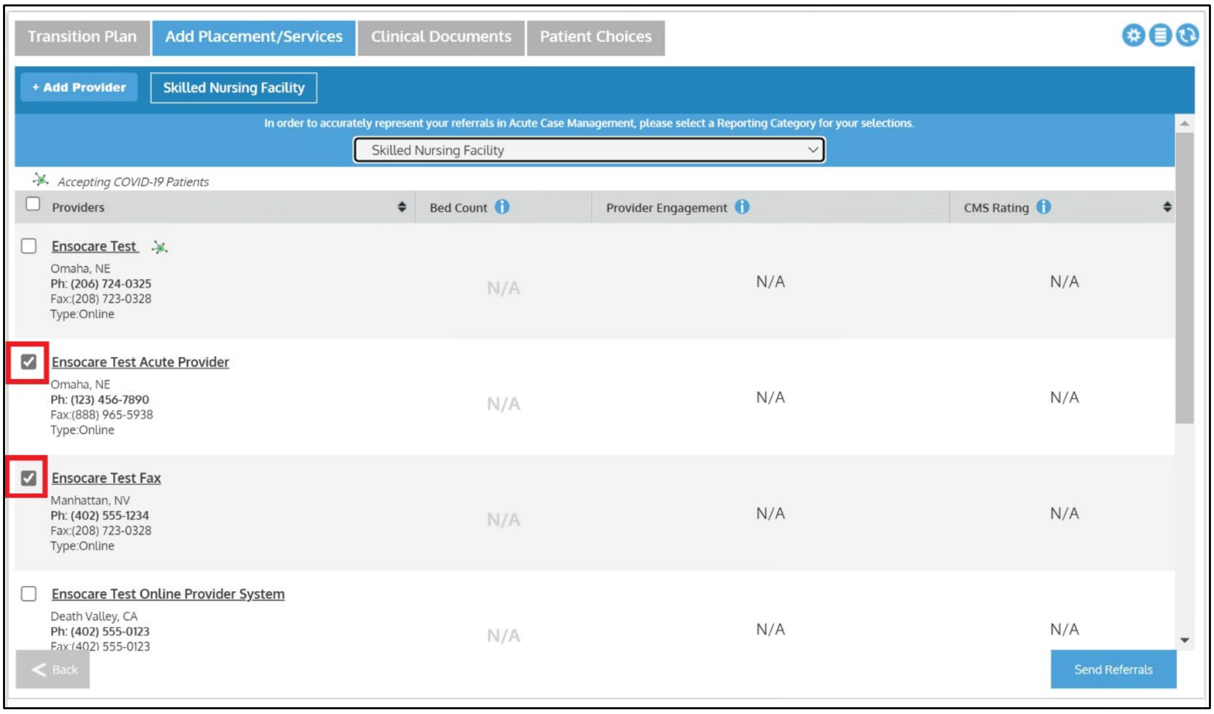
Note: If the user does not select the reporting category, a pop-up will appear instructing them to do so before they can proceed.

Figure 62. Detail of Reporting Category pop-up



5. Check the boxes to the left of the provider names to send referrals to.

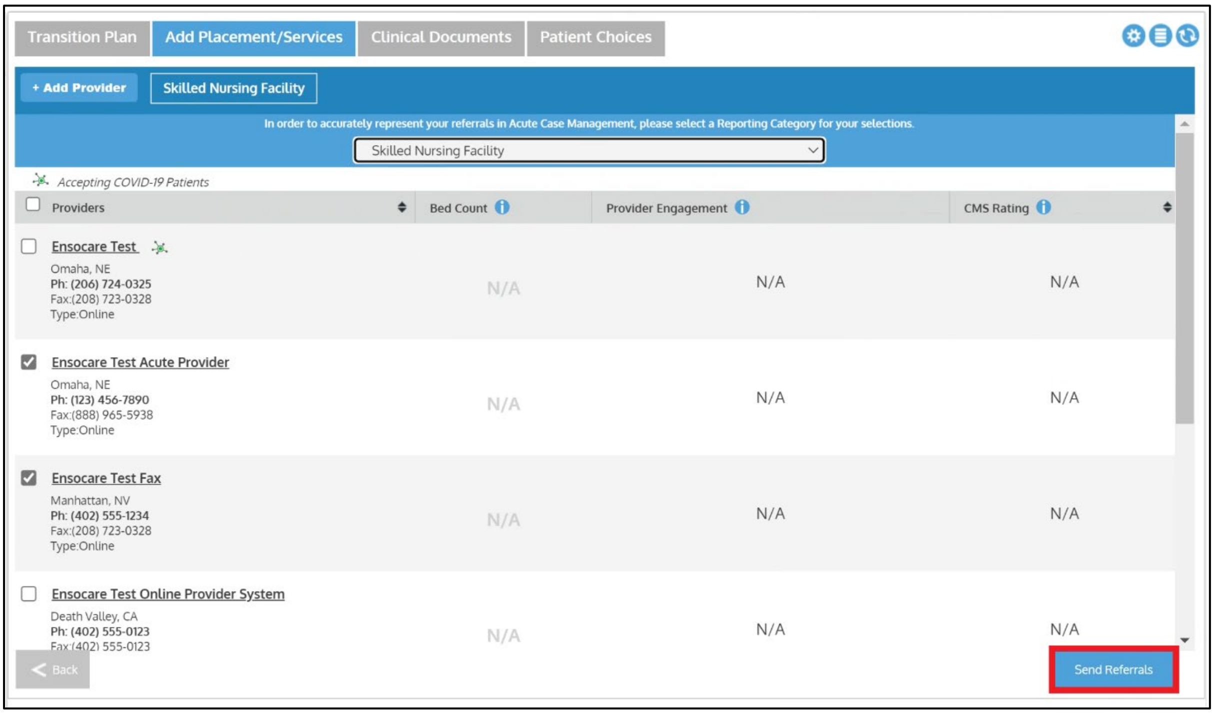
Figure 63. Detail of Selected Providers



Note: If the user checks the box next to **Providers** at the top of the list, it will select all providers in that level of care.

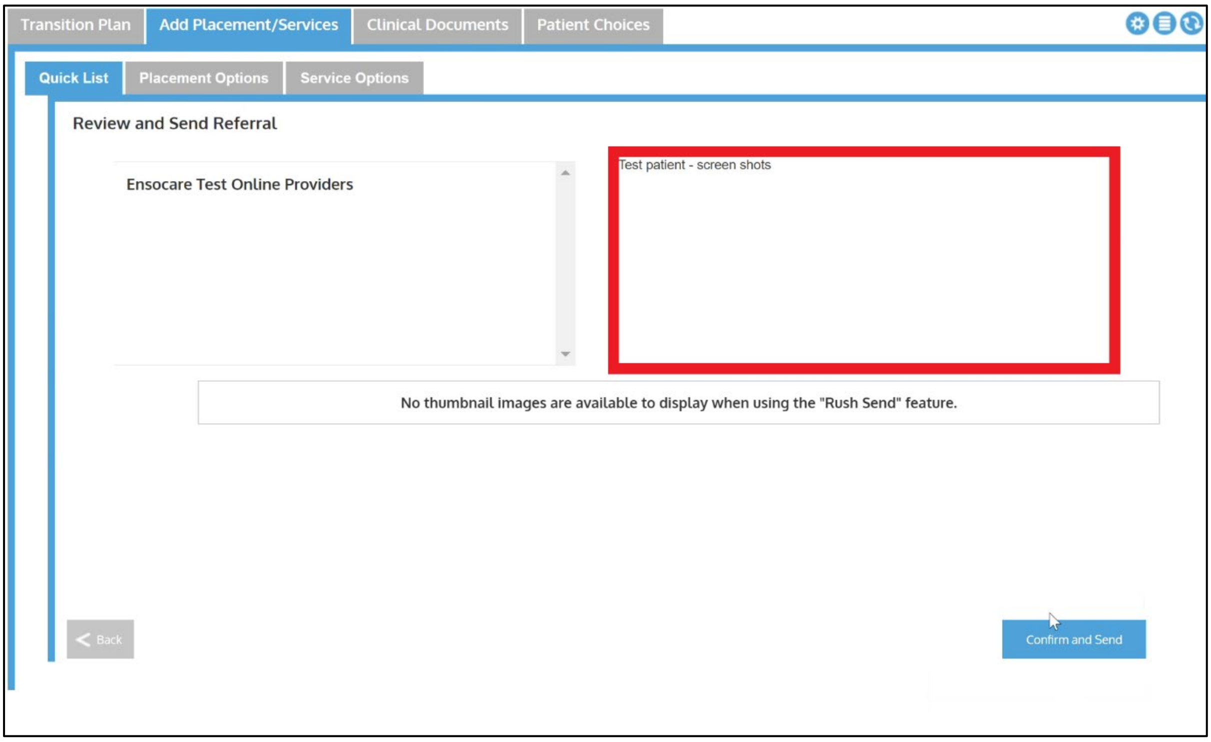
6. After the user has selected providers, click the **Send Referrals** button at the bottom-right corner of the screen.

Figure 64. Detail of Send Referrals



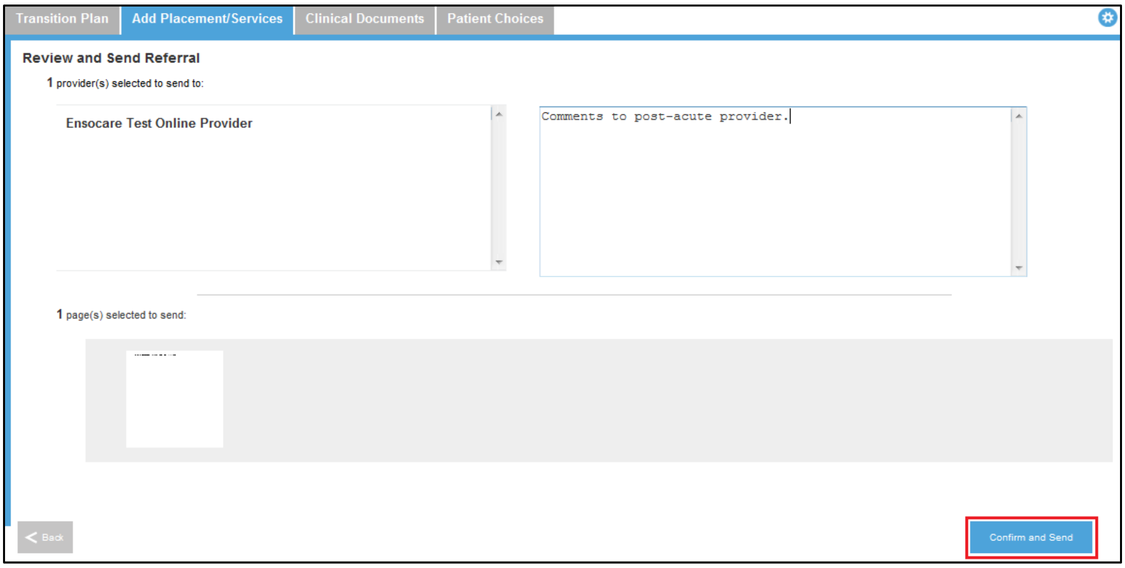
7. Select the clinical data to send by selecting the box to the left of the packet and click **Rush Send** and click the **Select Clinicals** button at the bottom-right corner of the screen.
8. Review selected facilities and confirm that clinicals are attached.
9. Add any notes to the post acute providers that need to be attached to the referrals in the free text box.

Figure 65. Detail of Free Text box



10. Click the **Confirm and Send** button at the bottom-right corner of the screen.

Figure 66. Detail of Confirm and Send button



The referrals have been sent and will appear in the **Transition Plan** for the Patient.

11. Review the Transition Plan for details on any inquiries and previous inquiries sent.

> **Note:** By clicking on the arrows next to **Activity** or **Providers**, the user can sort their list of post acute providers by their responses or sort the providers alphabetically.
>
> The default sorting will always be by most recent activity. There are buttons that can sort by Activity or Provider.

12. The **Post Acute Placement** or the **Post Acute Service** component in Cerner updates to reflect Pending referrals at the facilities to which users sent clinicals.
    - Responses of **Accepted**, **Declined**, or **Considering** populate automatically as providers respond to the referral. These can be found under the Status column of the component.

Figure 67. Detail of Post Acute Placement

13. Additional **Post Acute Placement** or **Post Acute Service** inquiries can be sent by clicking the **Add Placement/Services tab**, which will return the user to the **Advanced Search** page.

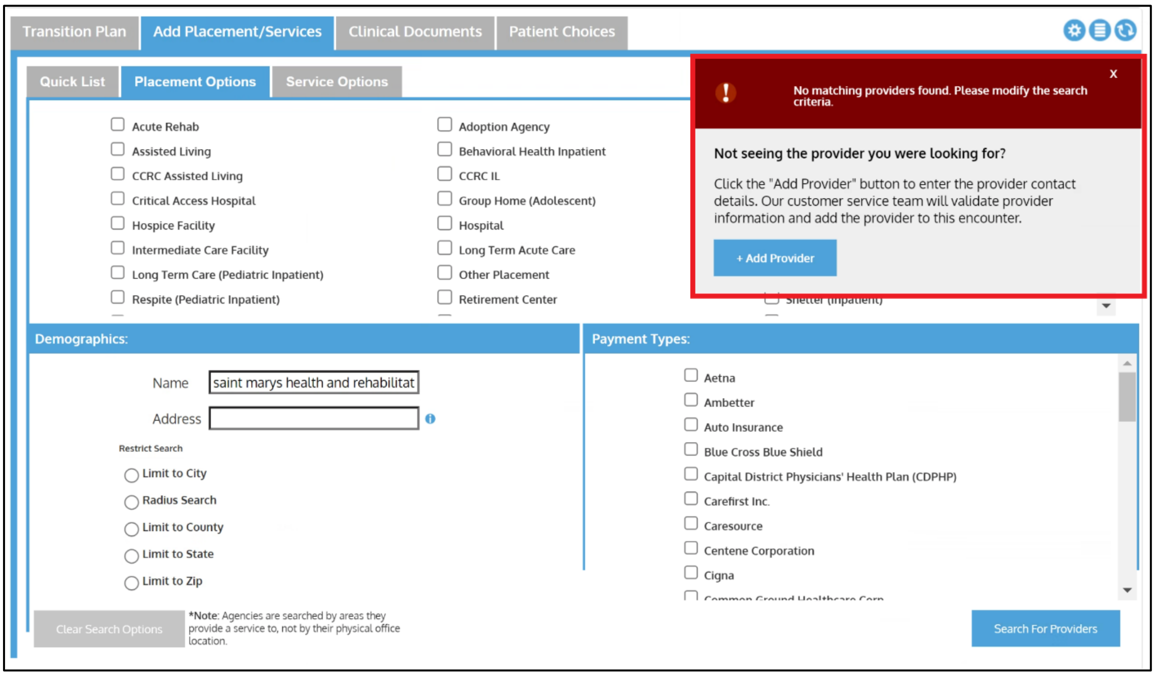
> **Note:** The user is notified of responses via text message or email, based on the user preferences they defined. For additional information on setting these preferences, refer to the **Initial Setup** section of this guide.

No Search Results found

If no search results are found, a pop-up will appear, and the user will either edit the search or click the **+ Add Provider** button.

> **Note**: When using the Name search, every character of the name must match how it is entered in the Ensocare Transition network or no search results will be found.

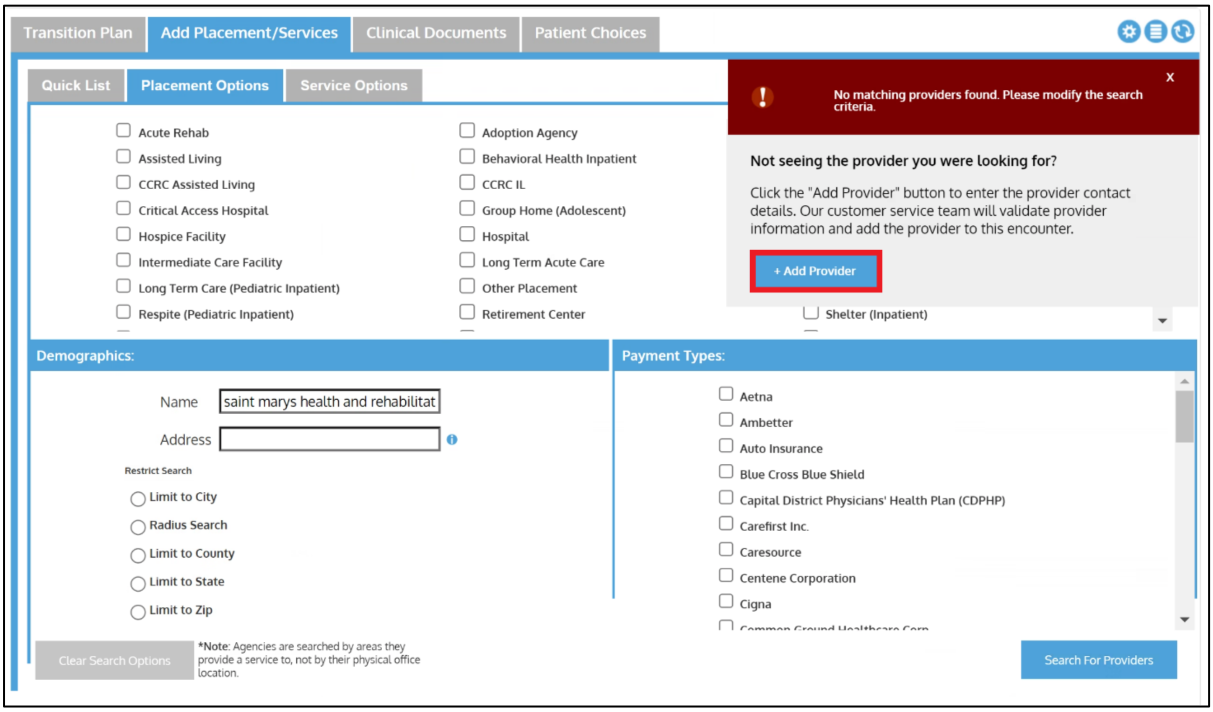
Figure 68. Detail of pop-up



To add a provider:

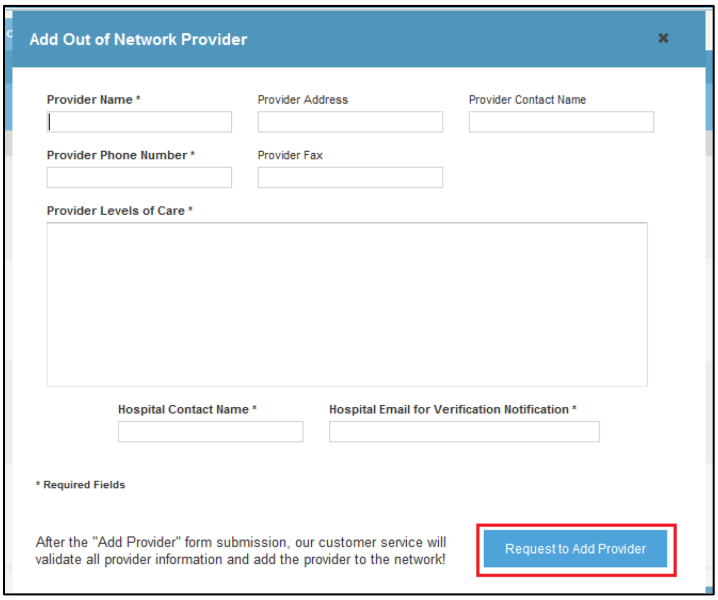
1. Click the **+ Add Provider** button at the bottom of the pop-up.

Figure 69. Detail of + Add Provider button



2. A dialog box will appear and ask the user to fill out the information for the requested facility.
    - This form will be sent to **Ensocare Customer Support** to validate all provider information and add the provider to the network.
    - Customer Support will reach out to the user as soon as they are added into the Network, and they may then send the referral to the requested provider.
3. Click the **Request to Add Provider** button at the bottom-right corner of the dialog box.

Figure 70. Detail of Request to Add Provider button



5. Send Additional Clinical Documents

After the user has made an initial referral to a provider, use the workflow below to send additional clinicals that were uploaded into Ensocare Transition.

To add clinical information in a pre-defined packet, see section **Send Additional Clinicals already uploaded to Ensocare**.

To add clinical information not in a pre-defined packet, see the section **Add Clinical Information that is not in a Pre-Defined Packet and Send to Provider**.

6. Book to Post Acute Placements

Once the user has confirmed the facility for placement, it is important to book the placement for the Patient.

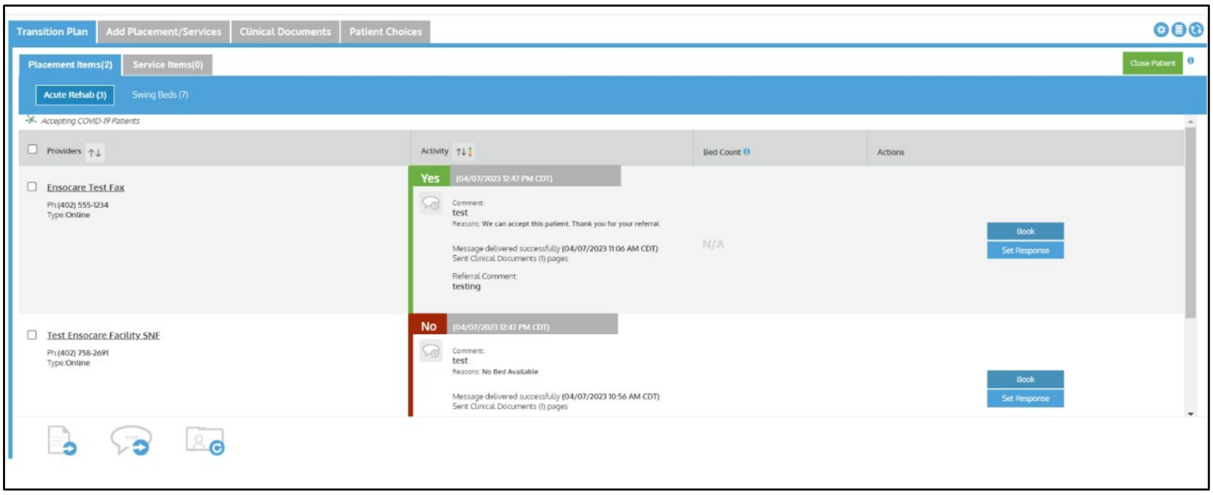
Booking notifies the selected provider that they are receiving the Patient, closes the other inquiries for the given level of care, and notifies the other providers that they were not selected.

Marking the referral as booked at the time the post acute facility accepts the placement will provide accurate reporting. Once booked, Ensocare retracts the referrals from the other facilities in that level of care and they will no longer have access to the records.

To book the placement for a Patient:

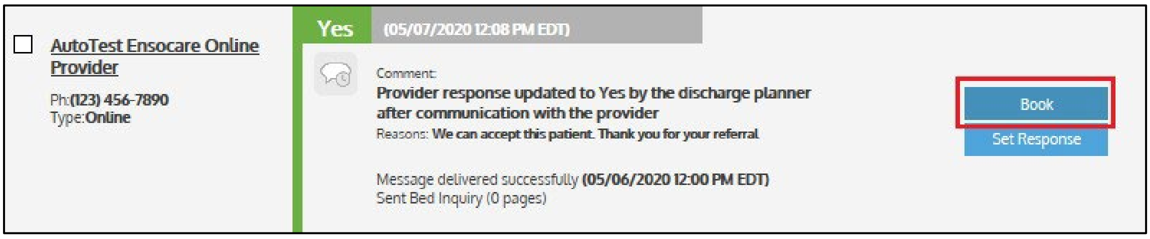
1. From the **Transition Plan** tab, select the level of care to book for the Patient.

Figure 71. Detail of Transition Plan



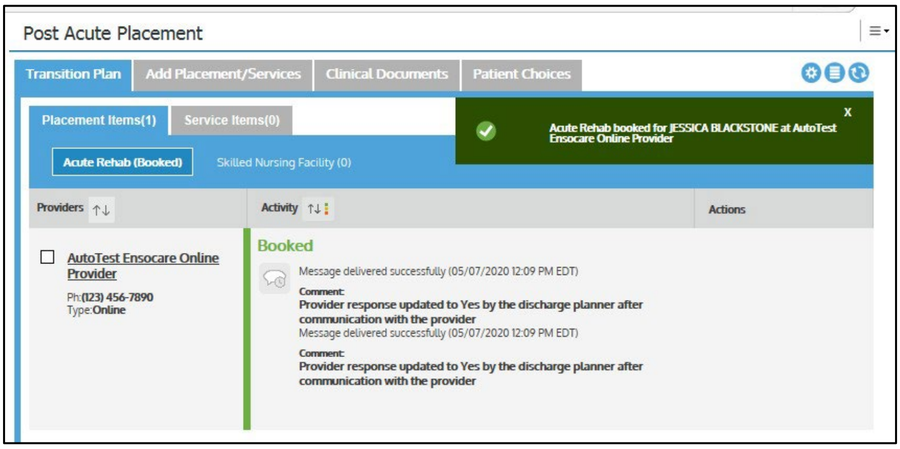
2. Find the specific **Placement** or **Service** to book for the Patient.
3. Click the **Book** button for the given **Placement** or **Service**.

Figure 72. Detail of Book button



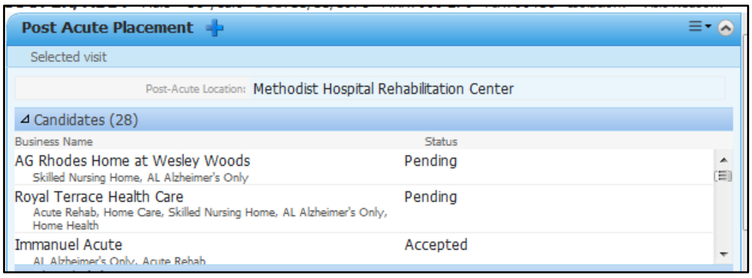
4. The screen will update to show **Booked**, and a green confirmation box will appear in the top-right corner of the screen.

Figure 73. Detail of Booked state



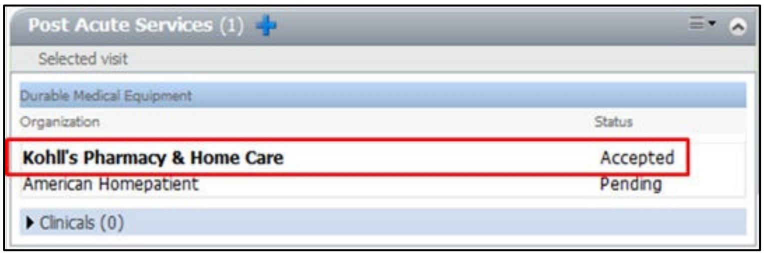
5. Booking a post acute placement for the Patient identifies the selected organization to the top of the **Post Acute Placement** component.

Figure 74. Detail of Post Acute Placement



Booking a post acute service bolds the selected organization in the **Post Acute Services** component.

Figure 75. Detail of Bolded Post Acute Service



6. After booking a provider, all other providers will receive a **Booked Elsewhere** notification and clinicals will no longer be available.

7. Close Patient

Closing a Patient in Ensocare Transition results in a notification to the **Post Acute Placement** and/or **Post Acute Service** providers that were booked that the Patient has been discharged.

Note: Any level of care that was not booked will be canceled.

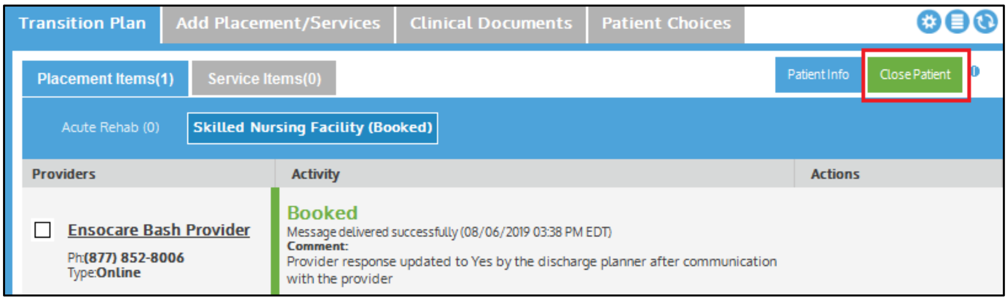
Users can close the Patient at any time but requires the Patient to have a placement item booked.

Note: To completely close the record, the user will need to discharge the Patient within Cerner.

To close a patient in Ensocare Transition:

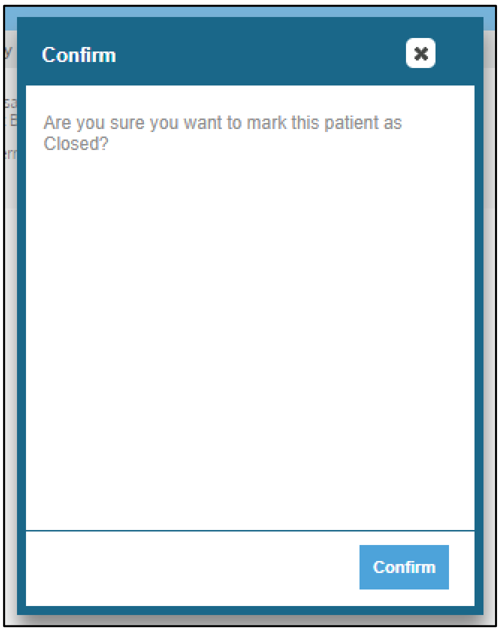
1. In the Transition Plan page click the **Close Patient** button in the top-right corner of the screen.

Figure 76. Detail of Close Patient button



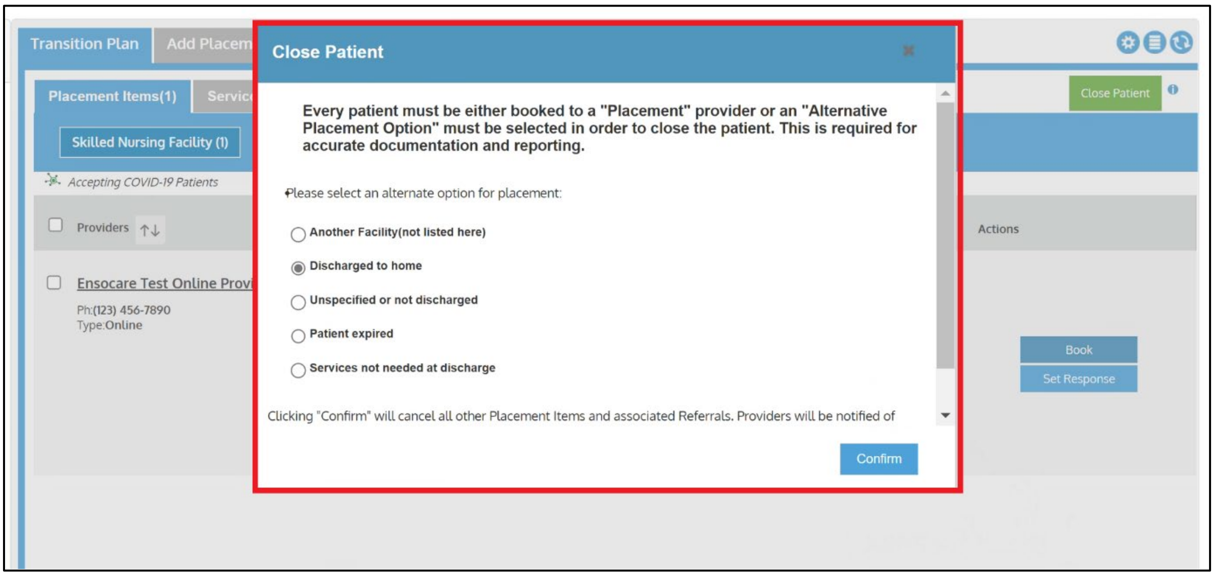
2. If booked to a placement, a dialog box will appear asking the user to confirm that they would like to mark the Patient as closed.
3. Click the **Confirm** button in the bottom-right corner of the dialog box to continue or click the **X** in the upper-right corner to cancel.

Figure 77. Detail of Confirmation dialog box



4. If the user has not booked a placement, a dialog box will appear asking them to select an alternative placement. Select the option and click the **Confirm** button in the bottom-right corner of the dialog box.

Figure 78. Detail of Close Patient dialog box

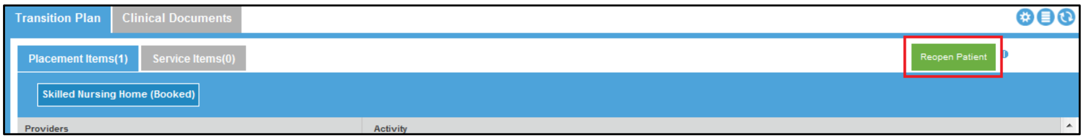


5. The Patient is closed, and the user is no longer able to communicate or send additional clinicals to the facility.

Figure 79. Detail of Confirmation message

6. If additional communication and/or referrals are needed for the Patient, click the **Reopen Patient** button in the top-right of the screen to reopen the record.

Figure 80. Detail of Reopen Patient button.



Note: After the patient encounter is closed, clinicals will be available to the booked facility for **14 days**.

Inactive Patient Closing

Inactive Patient Closing is a function of the ABOUT Ensocare system that will automatically close open patients that have been inactive for 60 calendar days.

By default, all inactive patients will be closed on a 60-day basis. However, this period can be shortened, extended, or the functionality turned off.

If any of the following actions occur, the patient will remain open:

- Commenting
- Adding Clinicals
- Sending Referrals
- Receiving Provider Responses

Transition Plan Navigation

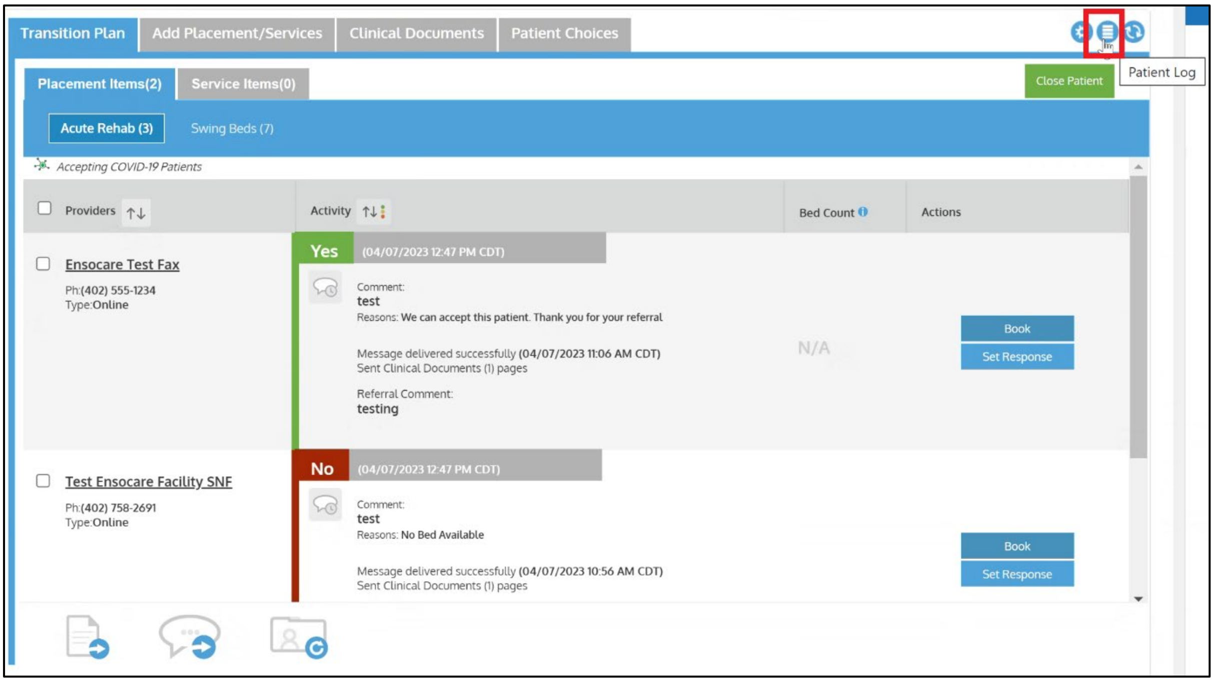
Viewing the Patient Log

Ensocare Transition allows a view of the Patient Log, which includes all activity that has occurred on the patient within the Ensocare system.

<u>To view the Patient log:</u>

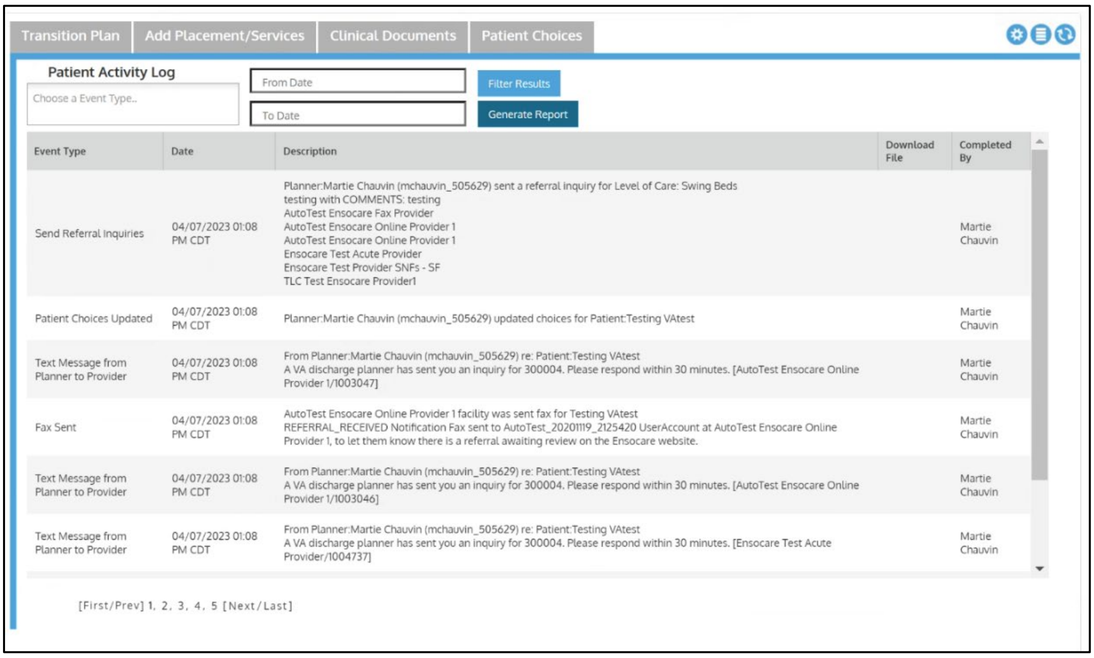
1. Click the **Patient Log** icon in the upper-right corner of the screen between the settings and refresh buttons.

Figure 81. Detail of Patient Log icon



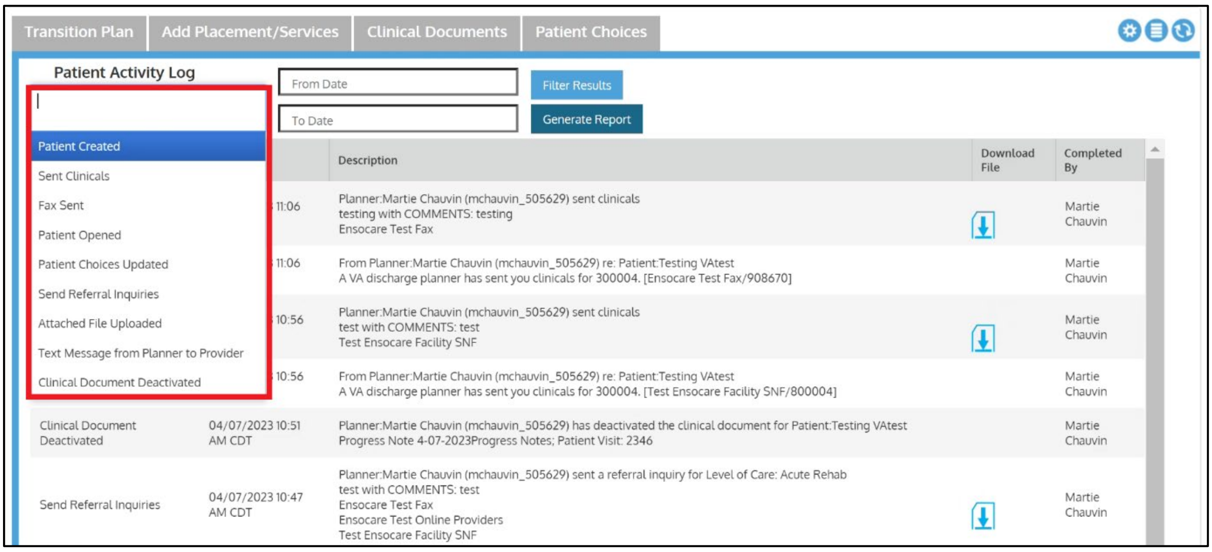
2. The Patient Log displays a list of the events that took place in the Ensocare system along with the user that accomplished each event.

Figure 82. Detail of Patient Log



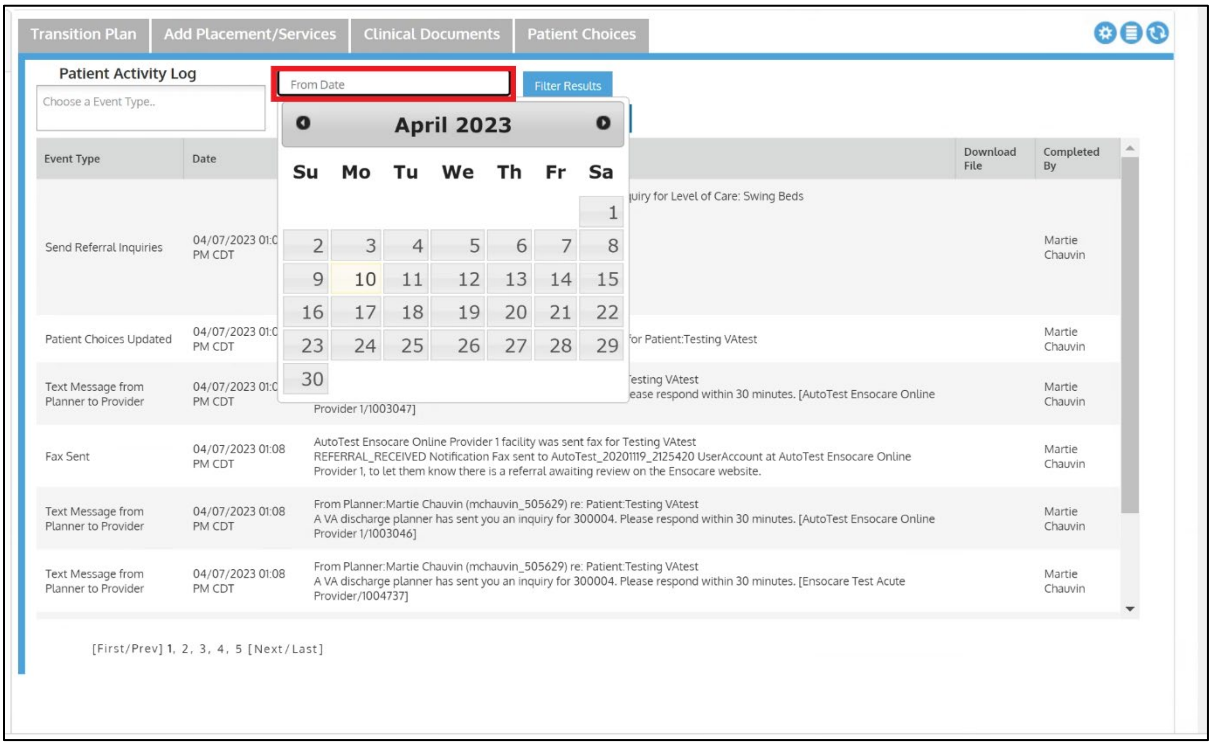
3. Click the box beneath **Patient Activity Log** to select <u>one or more</u> **Event Types** to find specific types of activities that were undertaken for the Patient.

Figure 83. Detail of Event Types



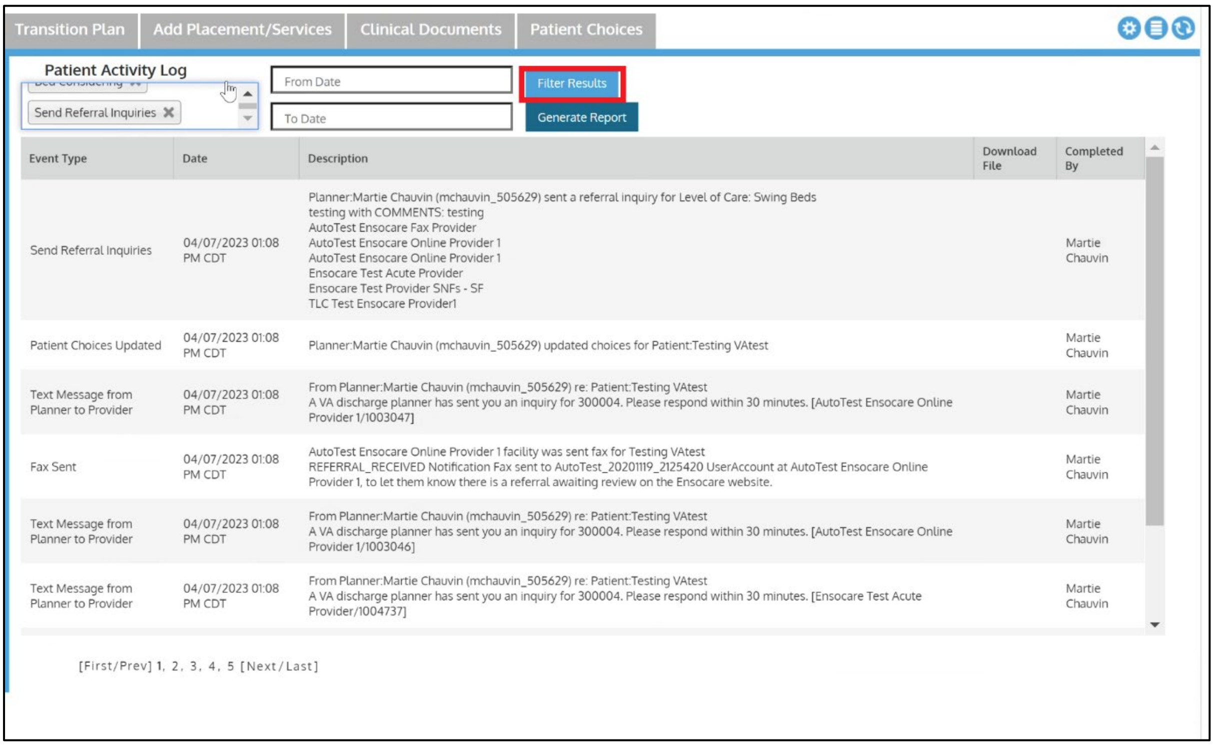
4. Click in the **From Date** and **To Date** fields to open a calendar where the user can choose a date range. If these fields are blank the search will not be limited by date.

Figure 84. Detail of Calendar



5. Click the **Filter Results** button next to the **From Date** field to update the view to include results in the table below.

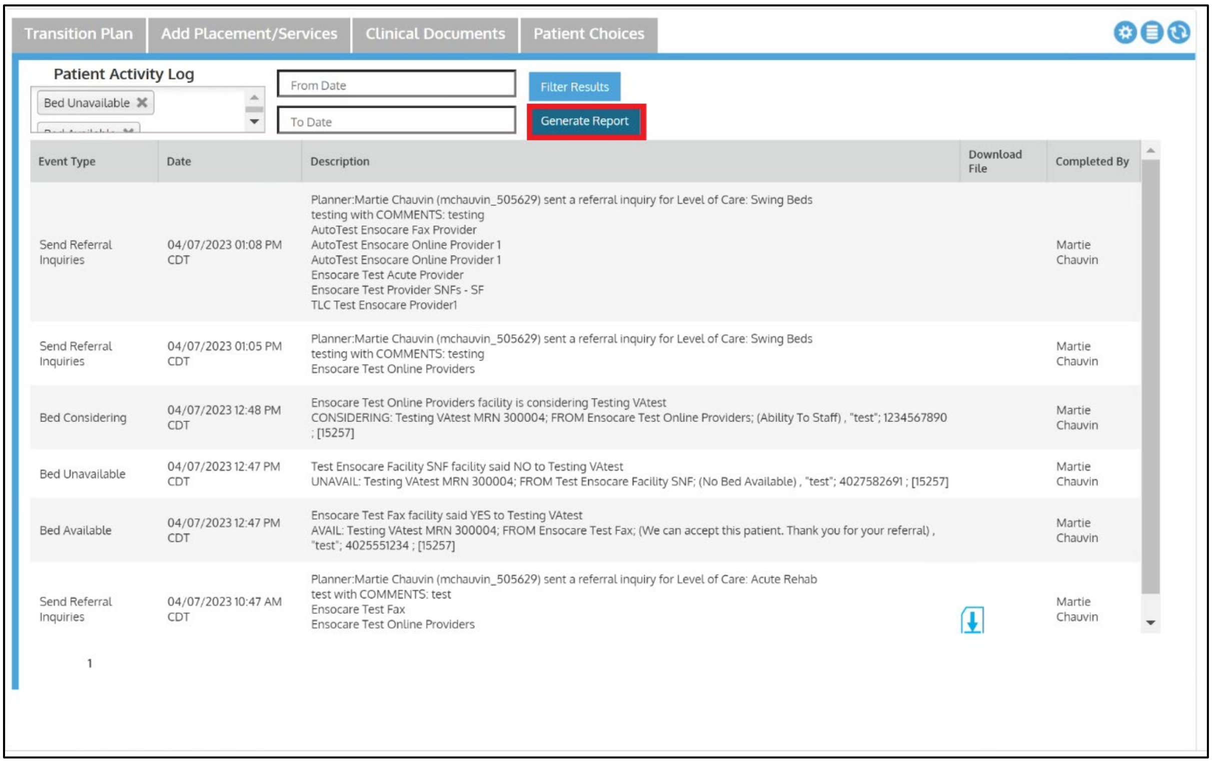
Figure 85. Detail of Filter Results button



To generate a report of the log in PDF form and print:

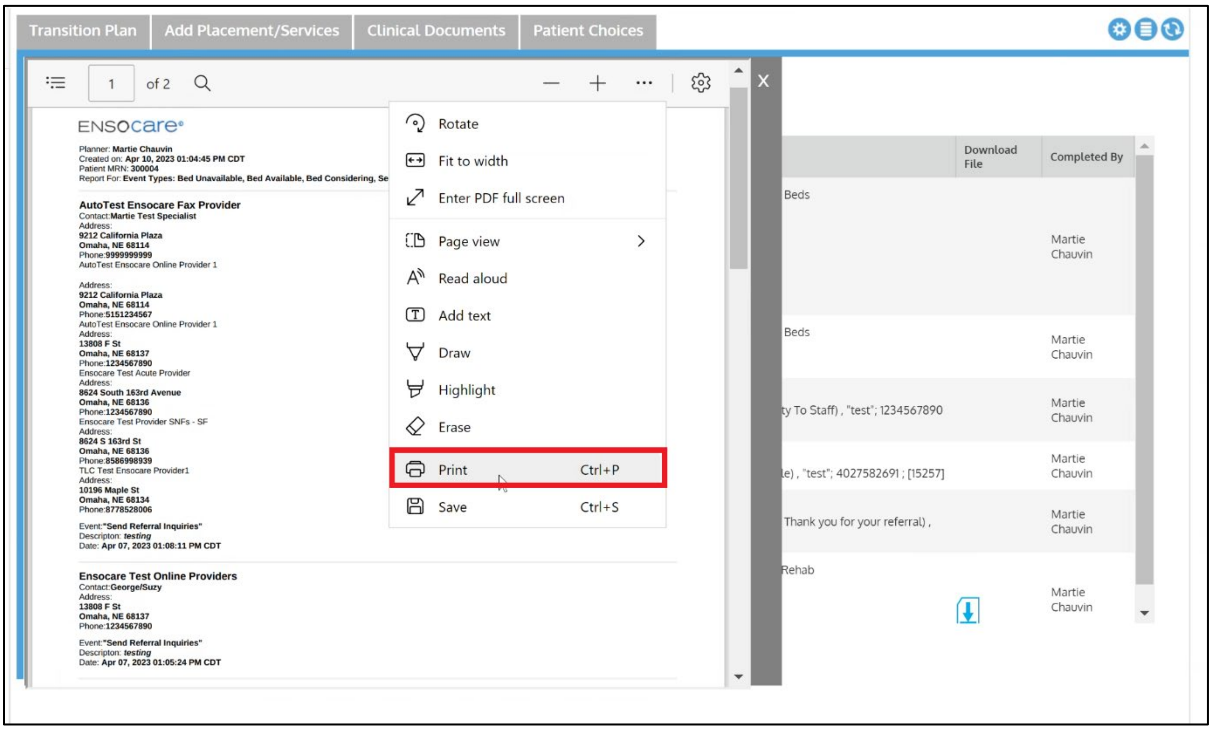
1. Click the **Generate Report** button next to the **To Date** field to generate a PDF document.

Figure 86. Detail of Generate Report button



2. Click the three dots and click **Print**.

Figure 87. Detail of Print Icon



Manually Setting a Response for a Provider

Use this workflow when a provider does not send a response using Ensocare Transition.

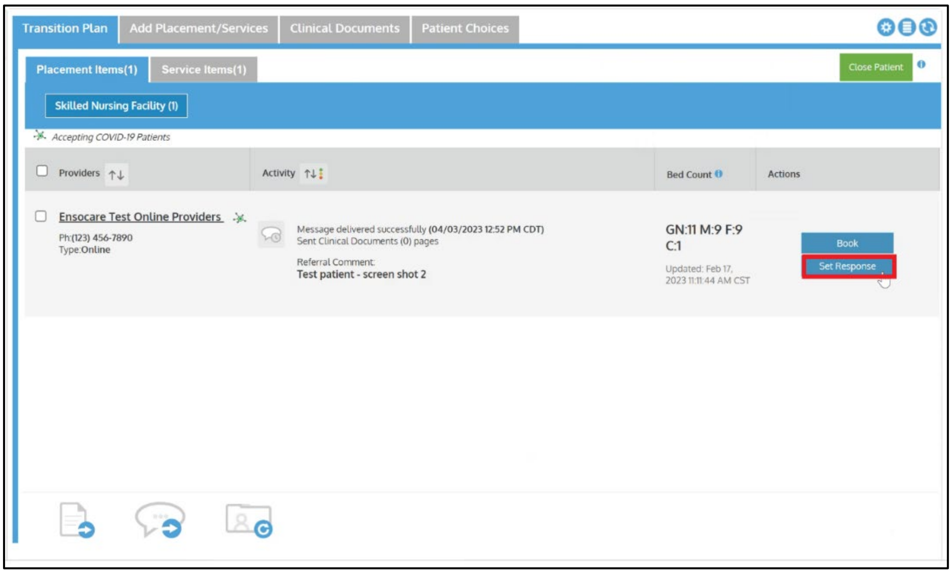
An example would be a provider notifying the user via the phone that they are accepting the Patient, so they need to manually set the response in Ensocare for tracking purposes.

> **Note**: If there are multiple referrals that need manual responses set, the user must set the response individually for each referral.

Complete the following steps to manually set a response from a provider:

1. From the **Transition Plan** tab, in the referral to set the response for, click the **Set Response** button.

Figure 88. Detail of Set Response button



2. Select **Yes**, **No**, or **Considering** for the response.

For a **No** or **Considering** response, the user must select a reason.

Figure 89. Detail of Yes Response

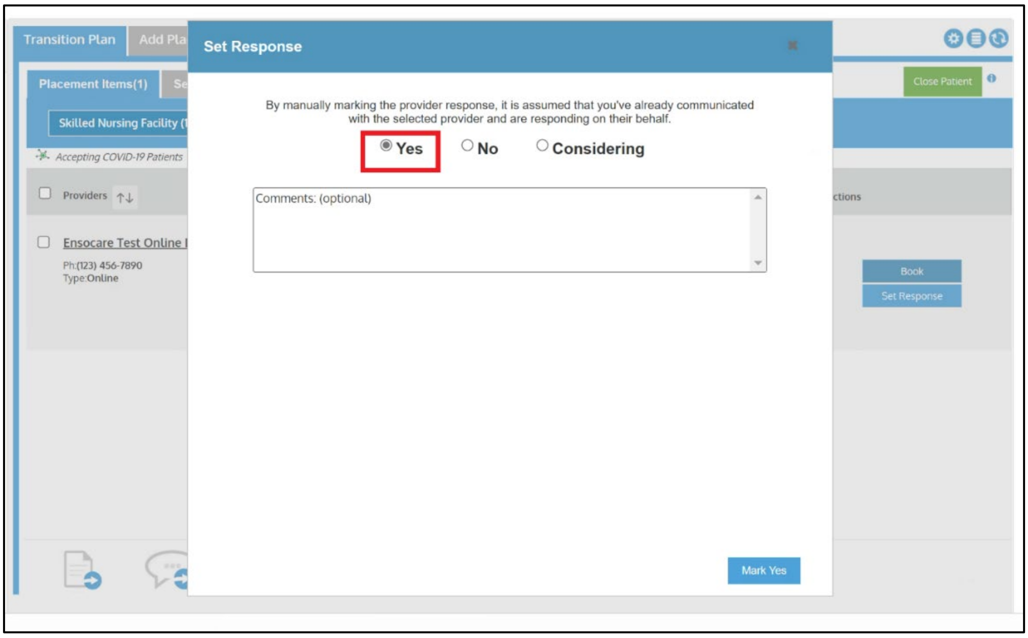


Figure 90. Detail of No Response

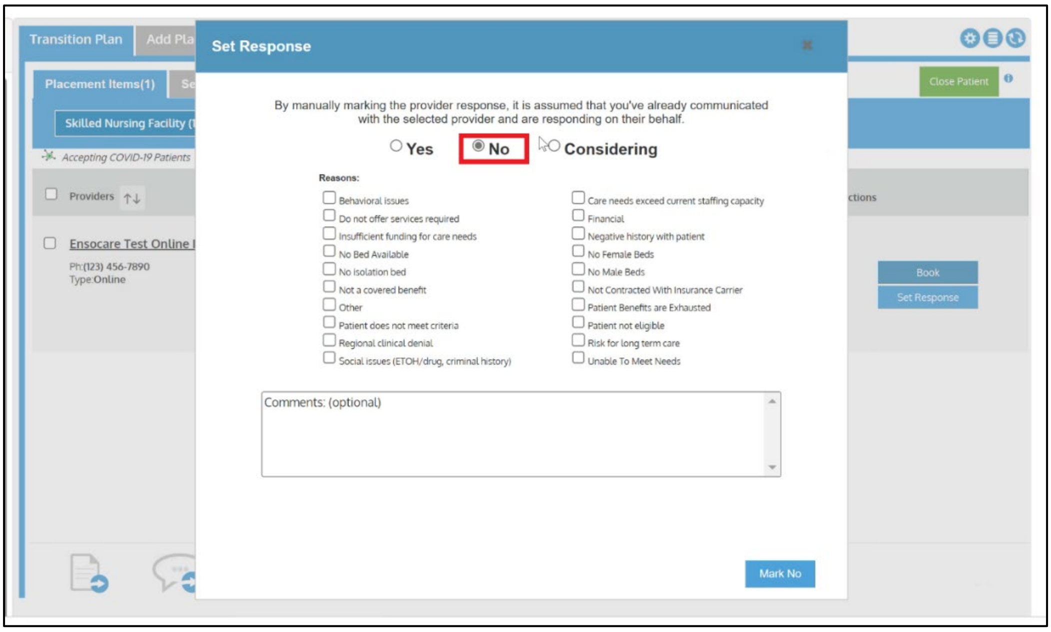
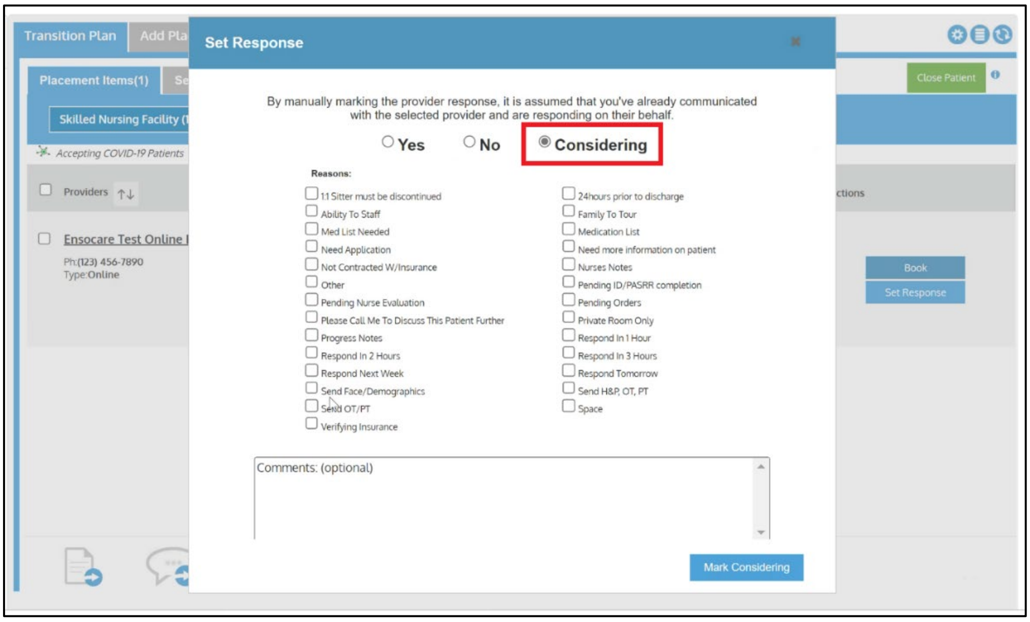


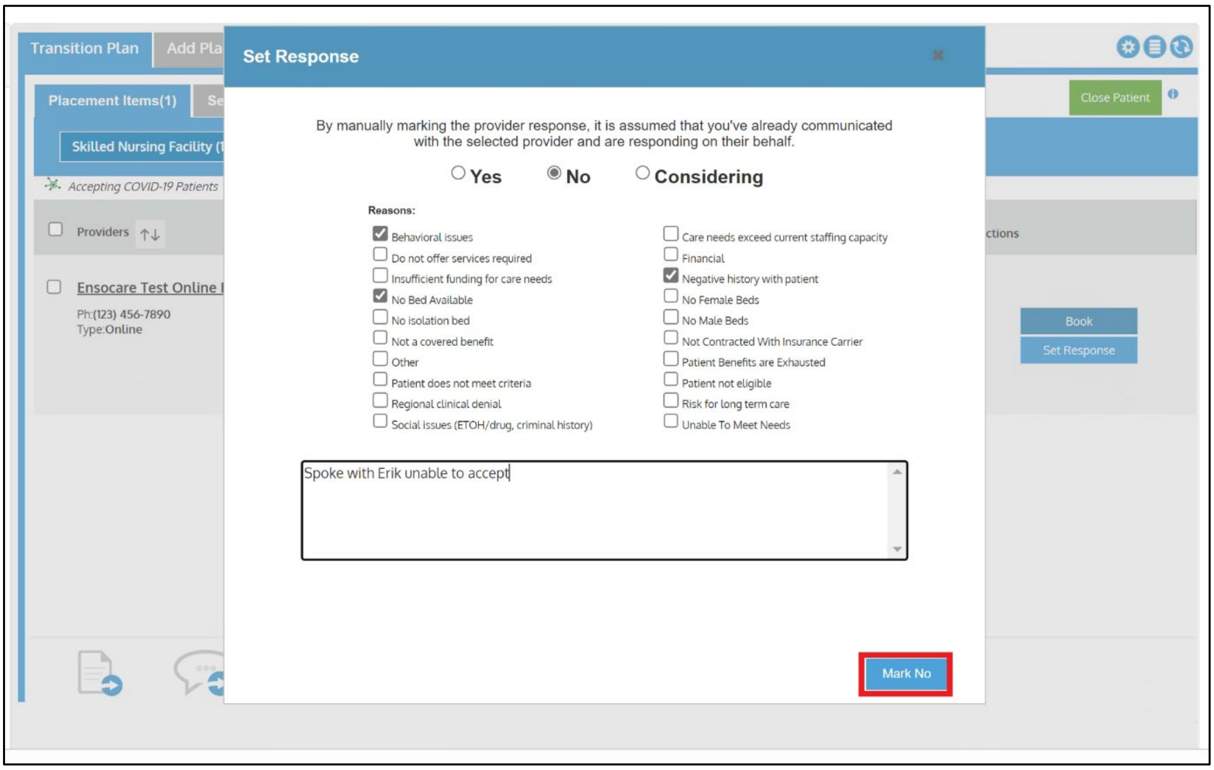
Figure 91. Detail of Considering Response



Note: Leave a comment including the person that the user contacted at the facility/agency that gave response.

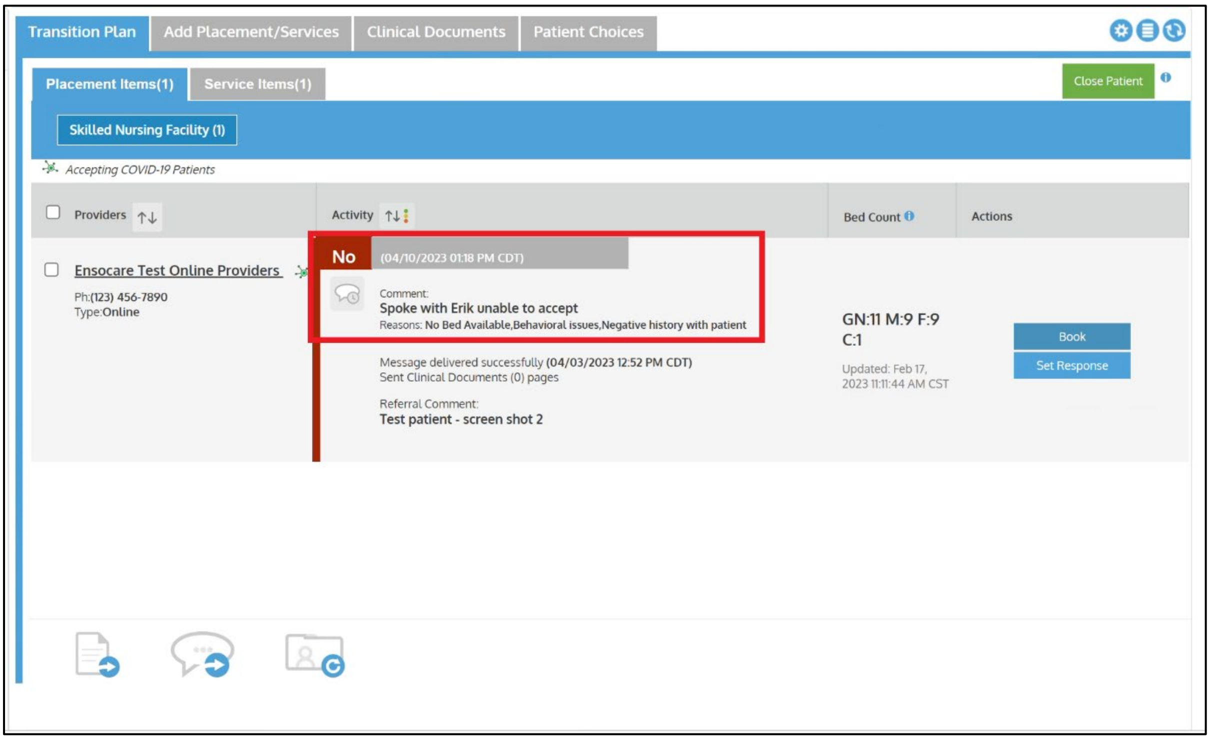
3. Click the **Mark Yes**, **Mark No**, or **Mark Considering** button in the bottom-right corner of the dialog box. The text on the button changes with each response type selected.

Figure 92. Detail of Mark Button



4. The item updates to include the response and comment with the reason for that response.

Figure 93. Detail of No Response with comment

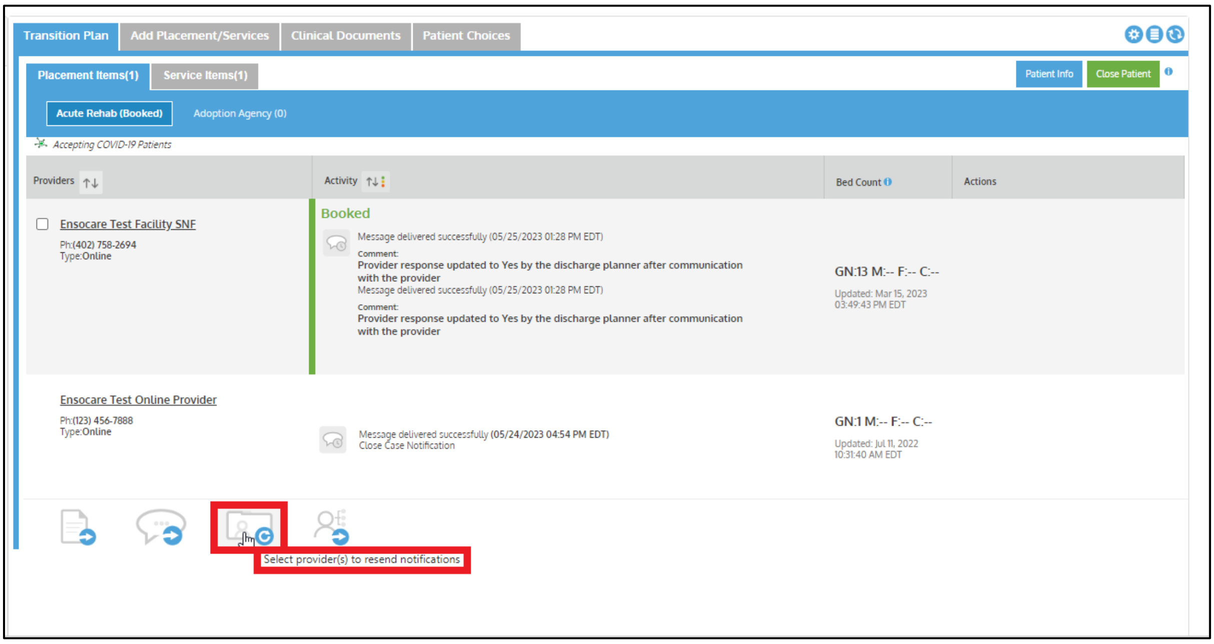


Resend Notifications

If a post acute provider reports they did not receive a referral, complete the following steps to resend a referral:

1. From the **Transition Plan** tab, select the post acute provider to resend the notifications to.
2. Click the **Resend Notifications** icon at the bottom of the screen.

Figure 94. Detail of Resend Notifications icon

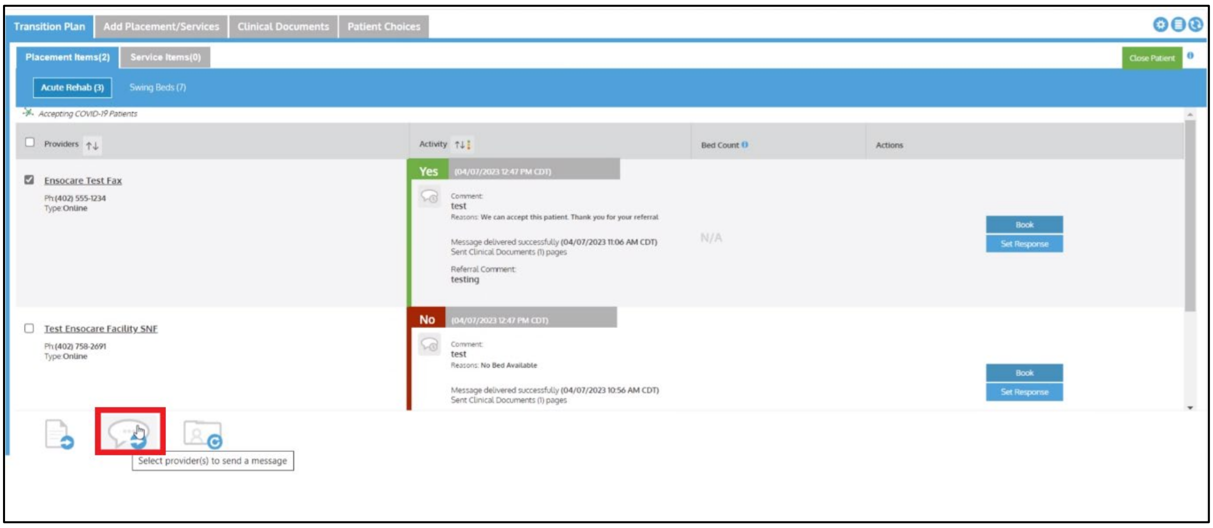


Send a General Message to a Provider

Complete the following steps to send a message to a provider:

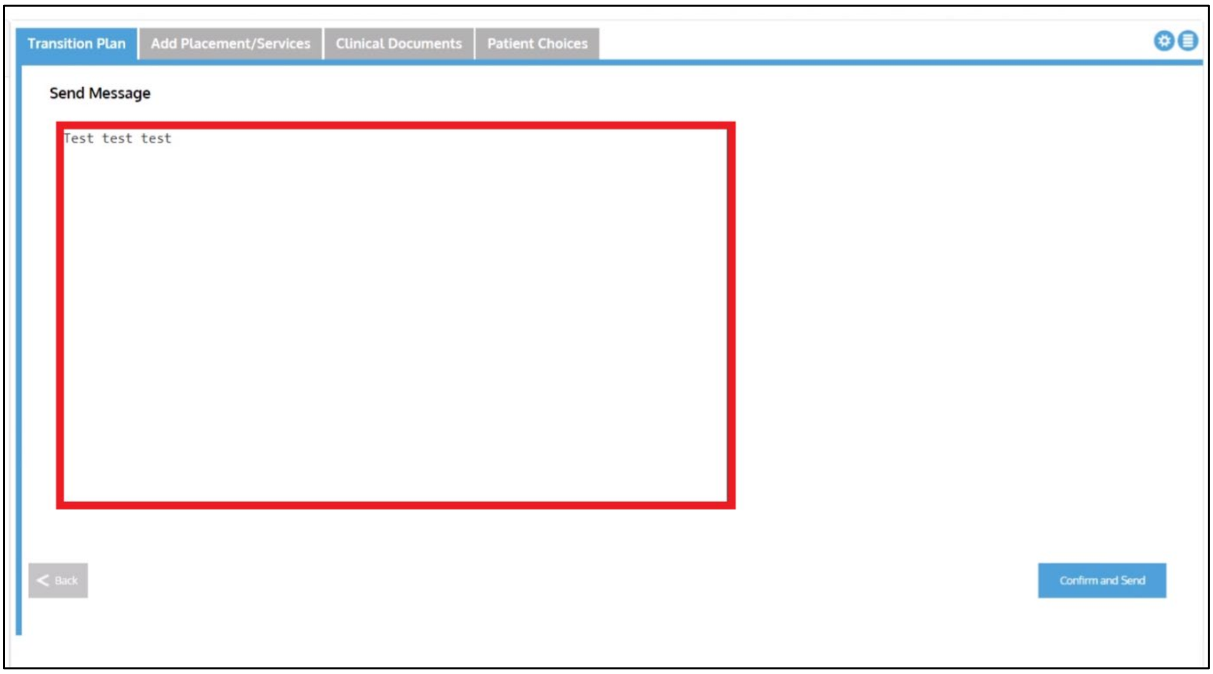
1. From the **Transition Plan** tab, select the post acute provider(s) to send a message to.
2. Click the **Send Message** icon at the bottom left corner of the screen.

Figure 95. Detail of Send Message icon



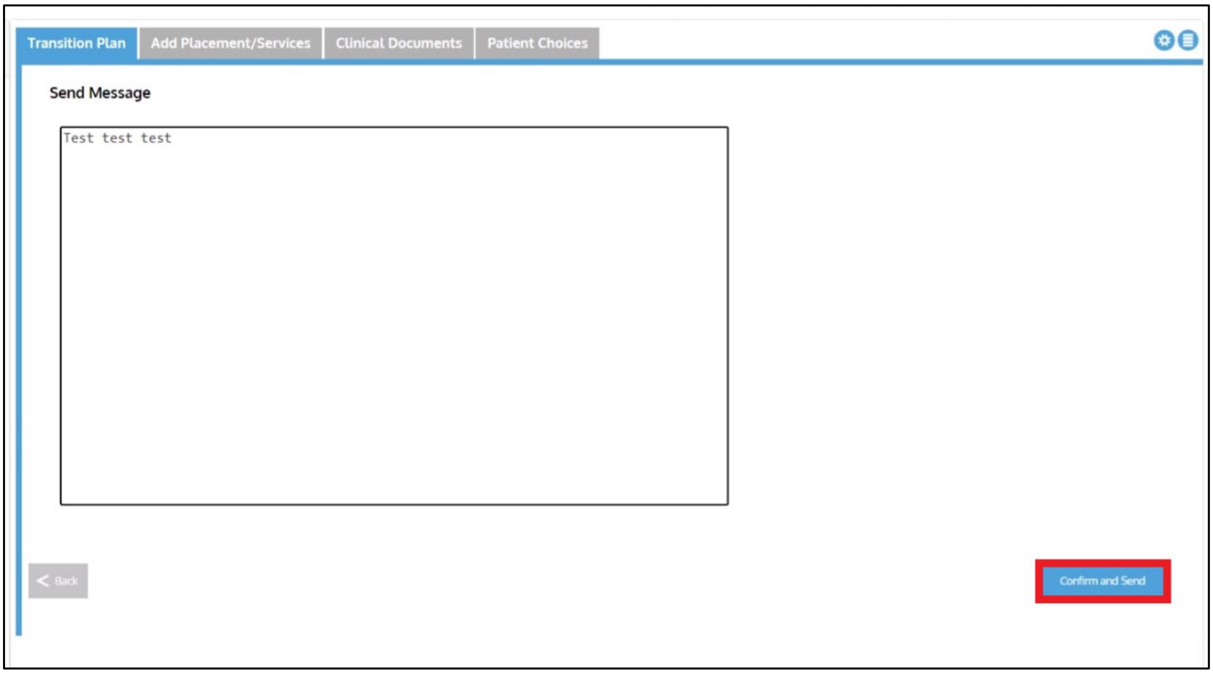
3. Type a free-text message to send to the post acute provider.

Figure 96. Detail of Message example



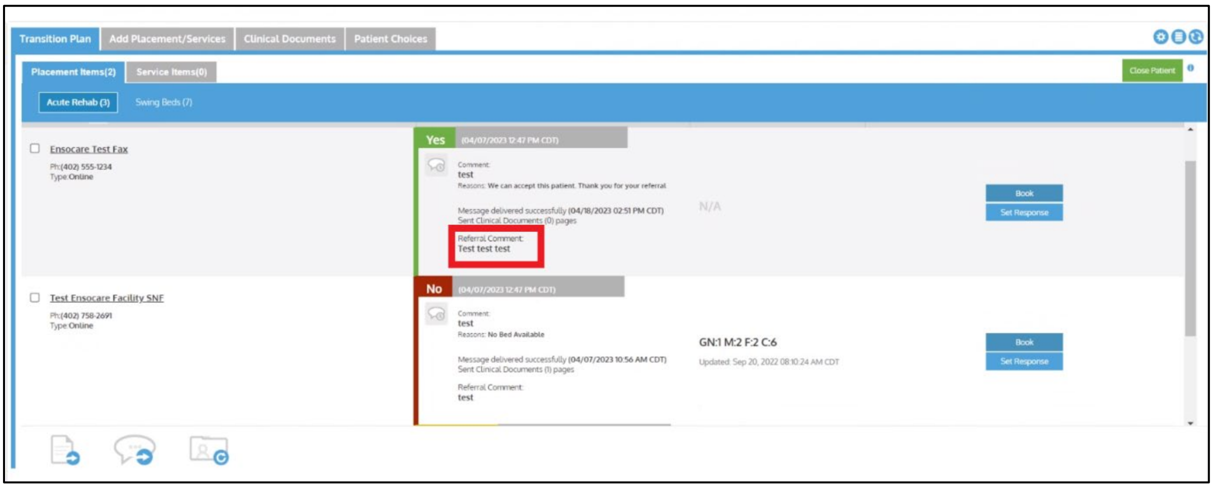
4. Click the **Confirm and Send** button in the bottom-right corner of the screen.

Figure 97. Detail of Confirm and Send button



The **Transition Plan** will update with the message.

Figure 98. Detail of Updated message



Cancel Placement or Service in Cerner

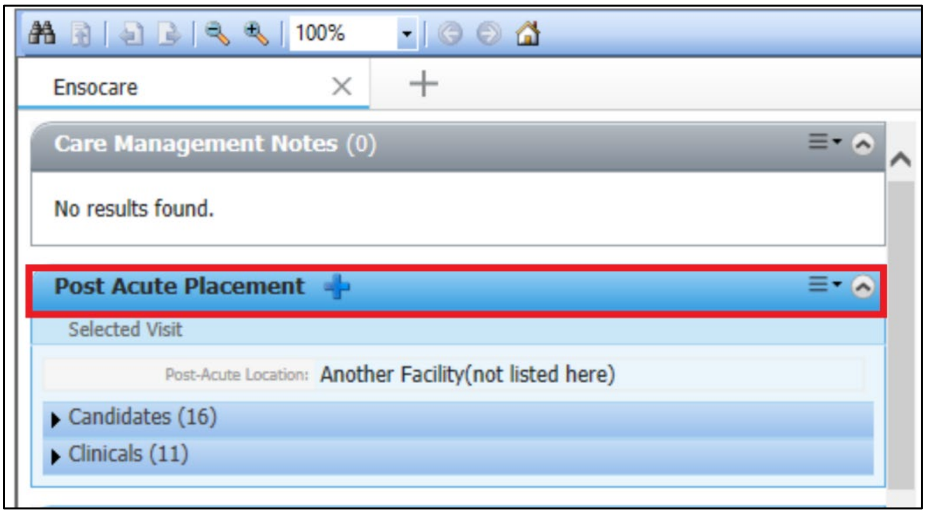
> **Note:** Canceling any referral within a level of care cancels all providers for that level of care.

Complete the following steps to cancel a placement:

> **Note:** The example in this guide is to cancel a placement, but this workflow can be followed for Post Acute Services as well.

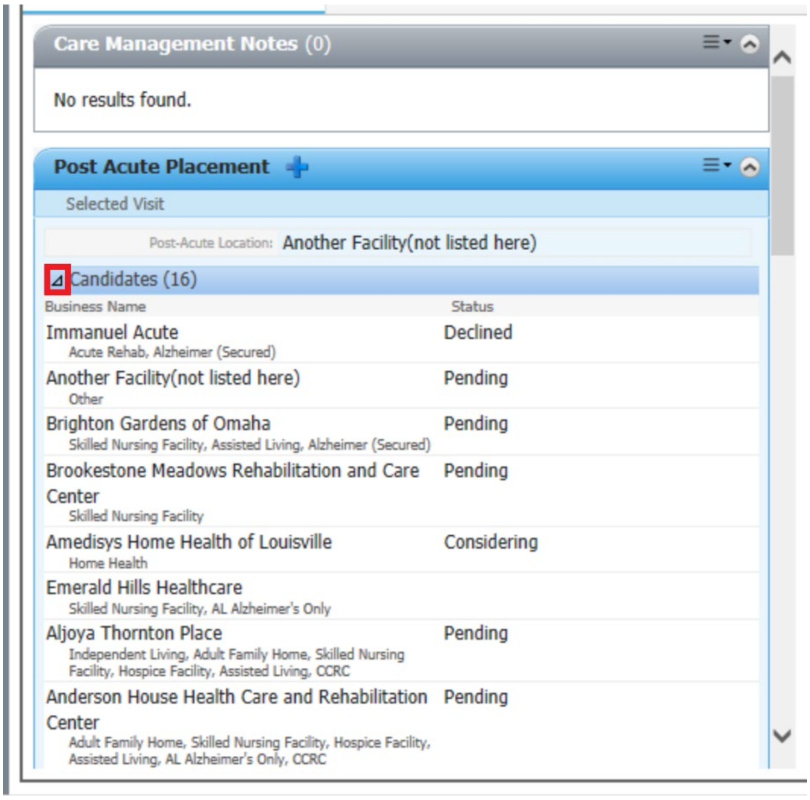
1. Find the **Post Acute Placement** widget in PowerChart.

Figure 99. Detail of Post Acute Placement in Cerner



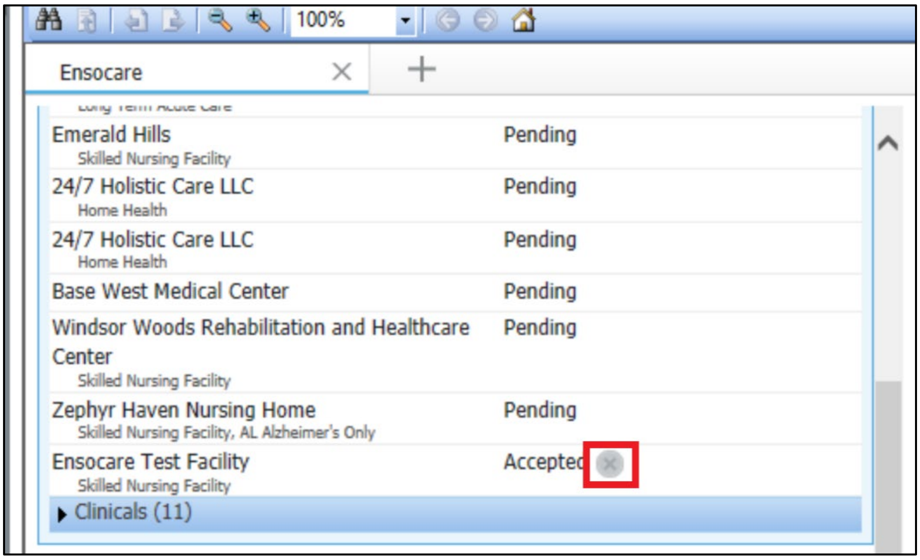
2. Expand the carat for **Candidates**.

Figure 100. Detail of Carat



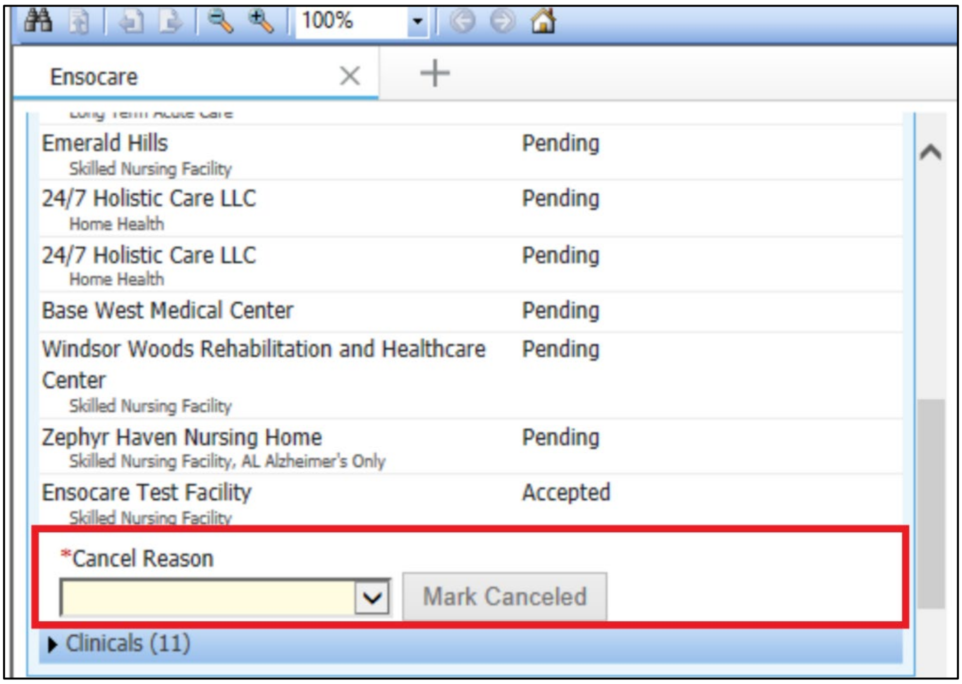
3. Position the cursor over the status of the placement to be canceled to display an **X**.

Figure 101. Detail of Displayed X



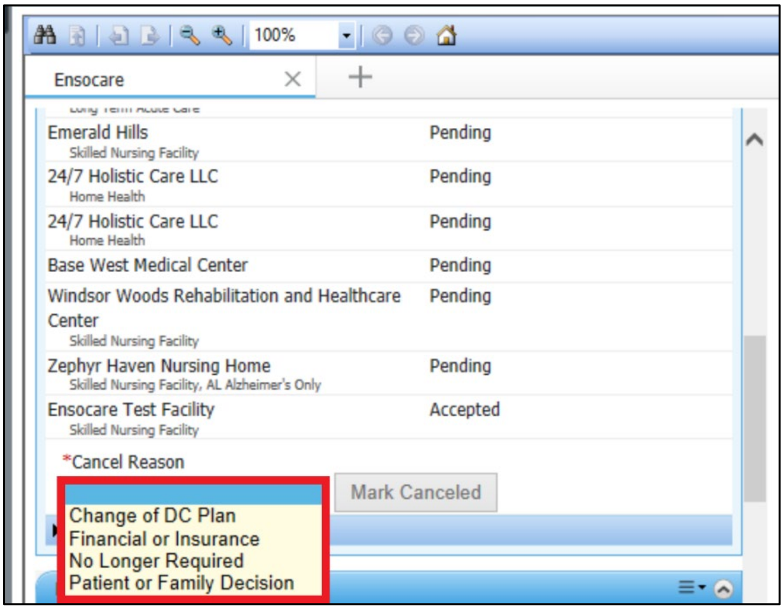
4. Click the **X** to display a **Cancel Reason** drop-down list.

Figure 102. Detail of Cancel Reason drop-down list



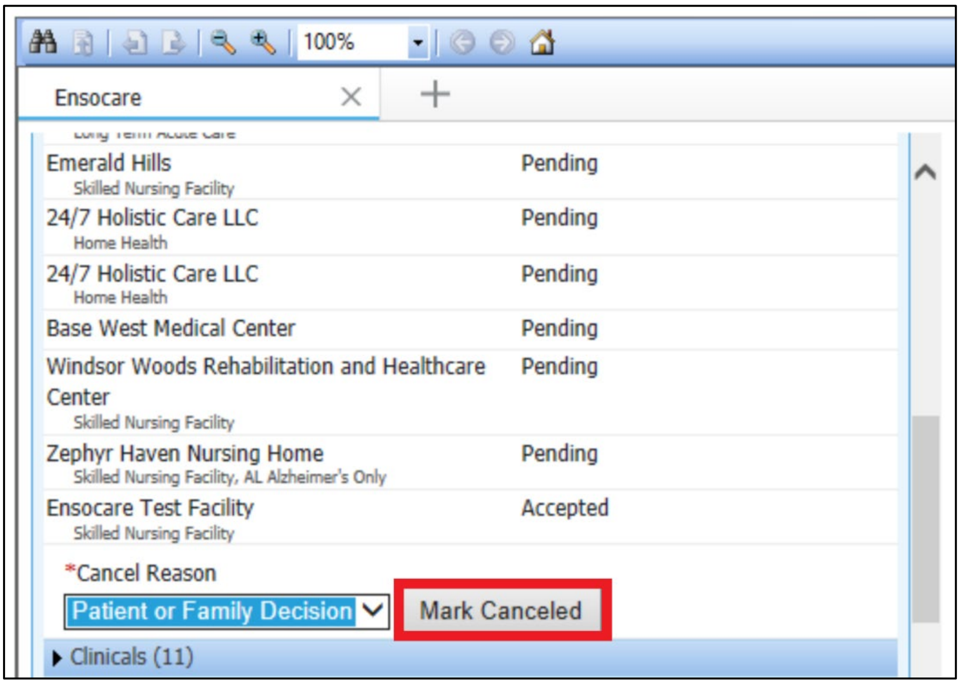
5. Select a **Cancel Reason** from the drop-down list.

Figure 103. Detail of Canceled Reason drop-down list



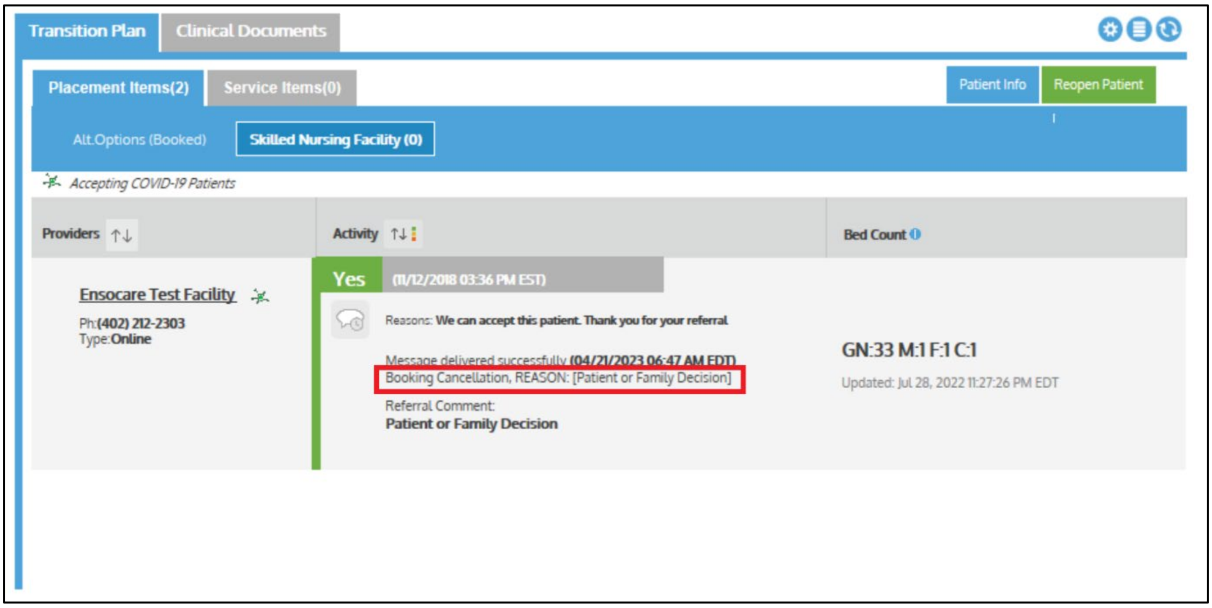
6. Click the **Mark Canceled** button to the right of the cancel reason.

Figure 104. Detail of Mark Canceled button



Ensocare will update to reflect the canceled status.

Figure 105. Detail of Booking Cancellation

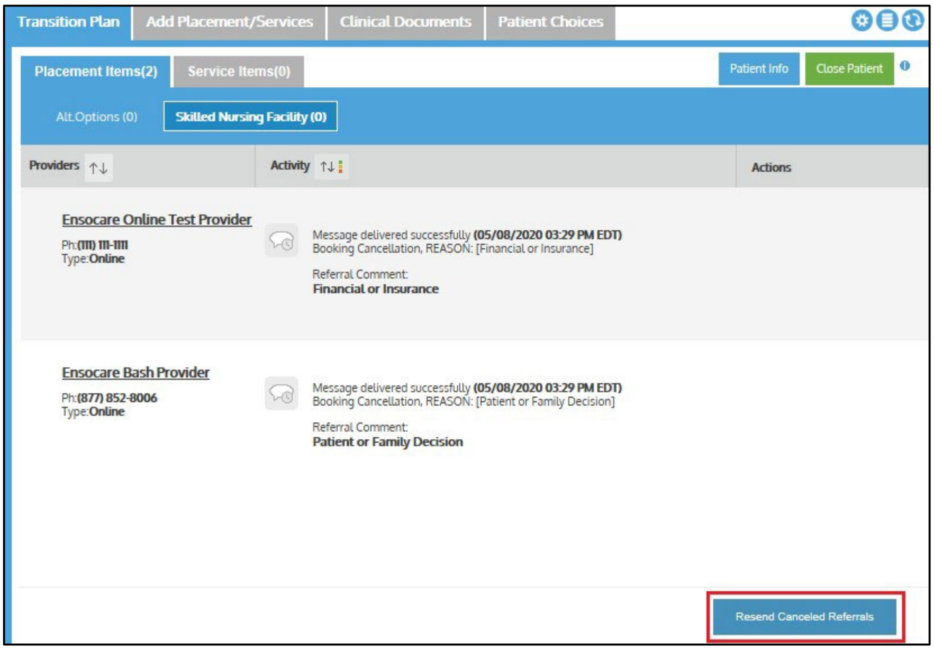


Resend After Canceling

Complete the following steps to resend a referral that has been canceled without having to search again:

1. From the **Transition Plan** tab, click the **Resend Canceled Referrals** button at the bottom-right corner of the screen.

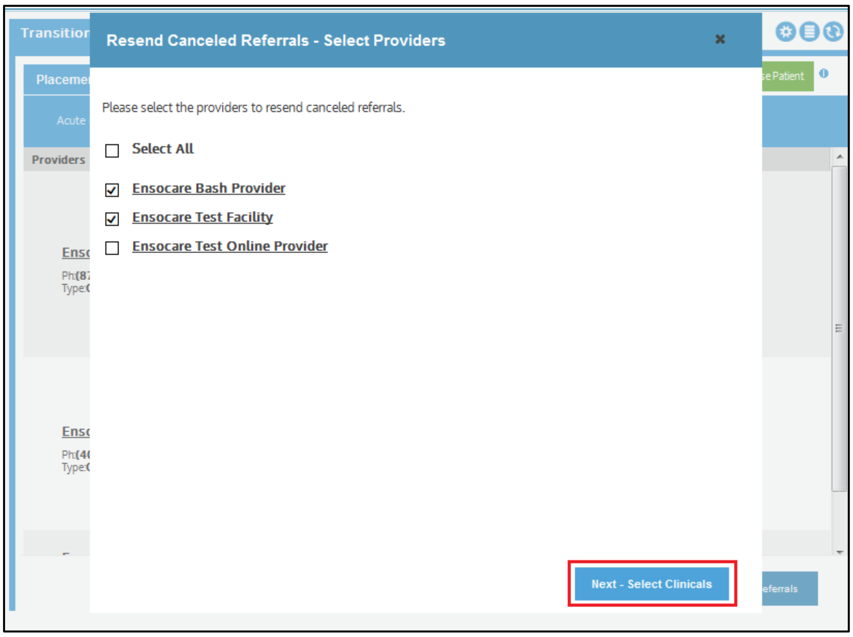
Figure 106. Detail of Resend Canceled Referrals button



2. A dialog box displays a list of post acute providers that have previously been sent referrals. Check **Select All** to send to all providers or check only those to resend the referral to.

3. Select the clinicals to attach and click the **Next -Select Clinicals** button in the bottom-right corner of the dialog box.

Figure 107. Detail of Next - Select Clinicals button



4. Verify the list of post acute providers and add any comments to include. Click the **Confirm and Send** button.

The referrals have now been sent to the providers and are visible in the Transition Plan.

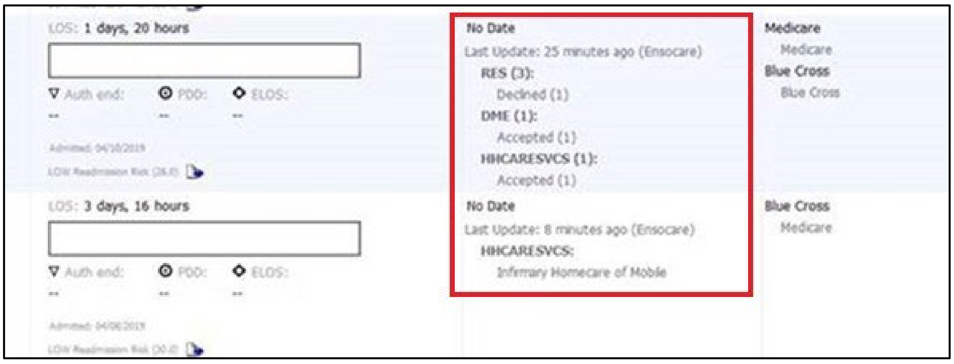
Patient Worklist

Any time there is an update on a Patient within Ensocare, the "Next Assessment" column in Cerner will update the date and time of the Last Ensocare Update for any recent action.

The end user will need to ensure they are actively refreshing the Discharge Planning worklist to see the updates.

Note: To entirely close out a Patient it will need to be discharged within Cerner.

Figure 108. Detail of Patient Worklist Activity



Ensocare Choice

Making Post Acute Referrals and Using the Patient Choice Application

Ensocare Choice is a feature to assist in providing patients with an effortless way to choose where they would like to receive their care.

Below are the two workflows for using the **Patient Choice** application:

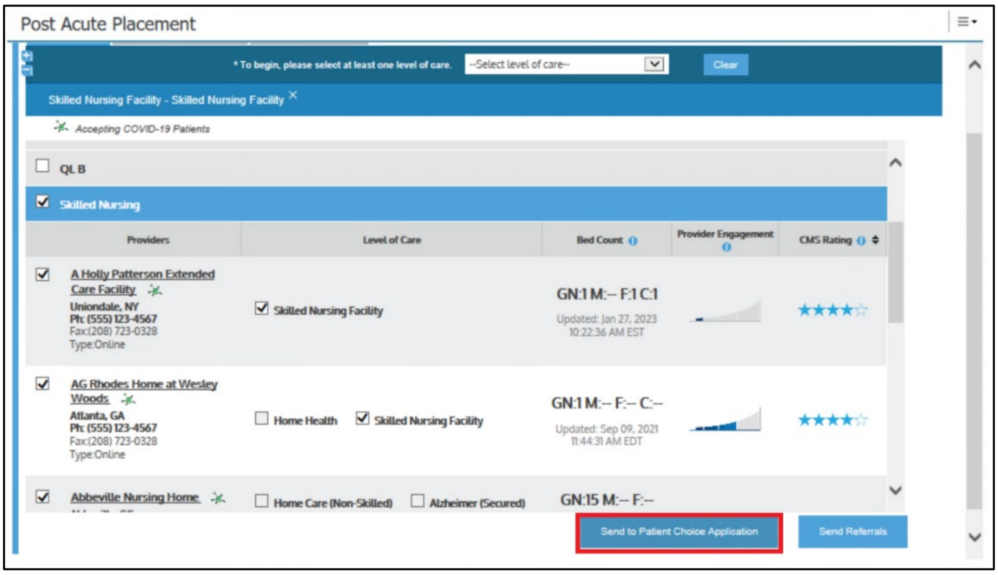
Workflow #1: Send to Patient Choice Application Before Sending Referrals

This workflow allows users to have the patient rank the post acute providers before sending the referrals. Sending before the referral ensures the patient has interest in the choices offered before patient information is transmitted to the potential providers

This will allow the patient to indicate their preference before referrals are sent.

1. After selecting providers, click the **Send to Patient Choice Application** button.

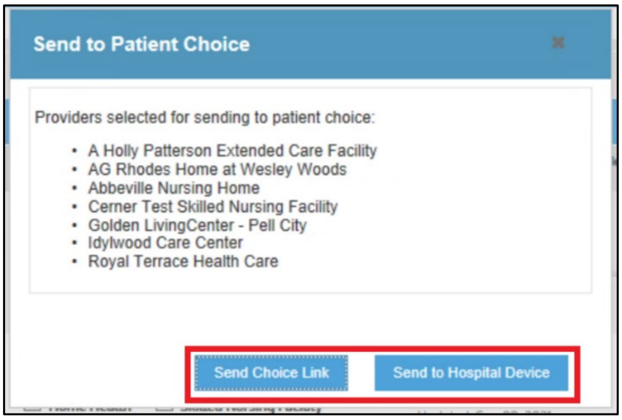
Figure 109. Detail of Send to Patient Choice Application button



After clicking **Send to Patient Choice**, users are given the option to select the providers with the "Yes" response and click Send Choice Link or Send to Hospital Device.

Using the **Send Choice Link** button will allow users to send a link via text or email and **Send to Hospital Device** will allow users to send the post acute providers to a hospital owned Ensocare Choice tablet.

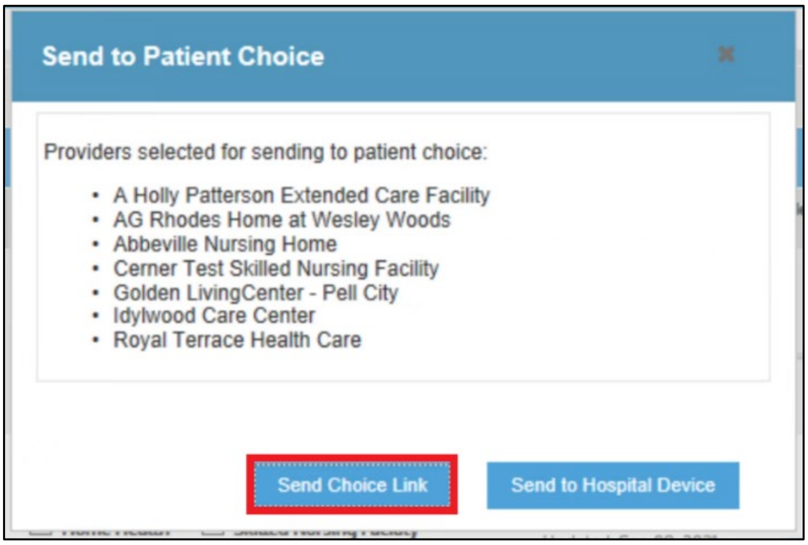
Figure 110. Detail of Send Choice Link and Send to Hospital Device button



Send Choice Link Workflow

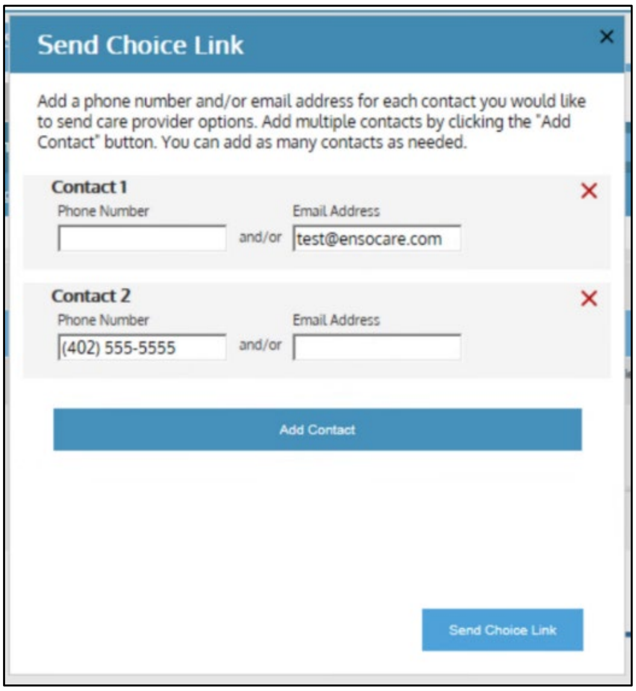
1. Click **Send Choice Link**.

Figure 111. Detail of Send Choice Link button



2. Enter the phone number and/or email address to send the Choice Link to.

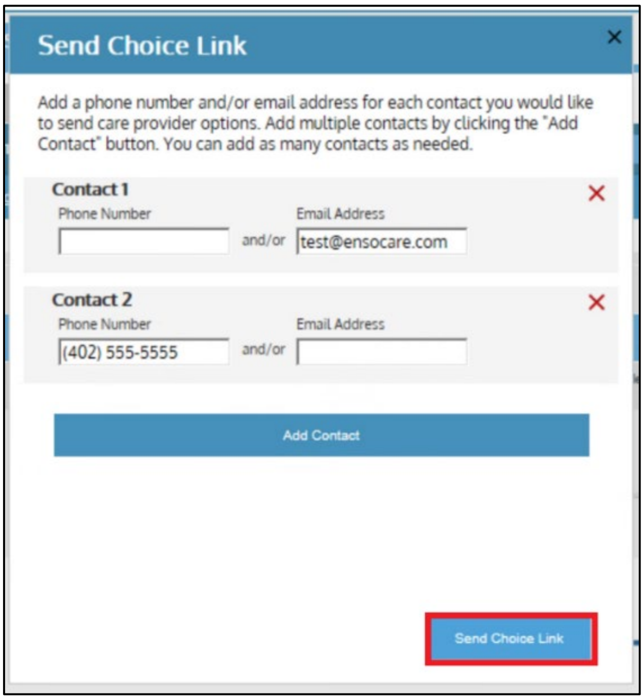
Figure 112. Detail of contact information



> **Note**: Users can add additional contacts by clicking on Add Contact and remove a contact by clicking the red X next to their line.

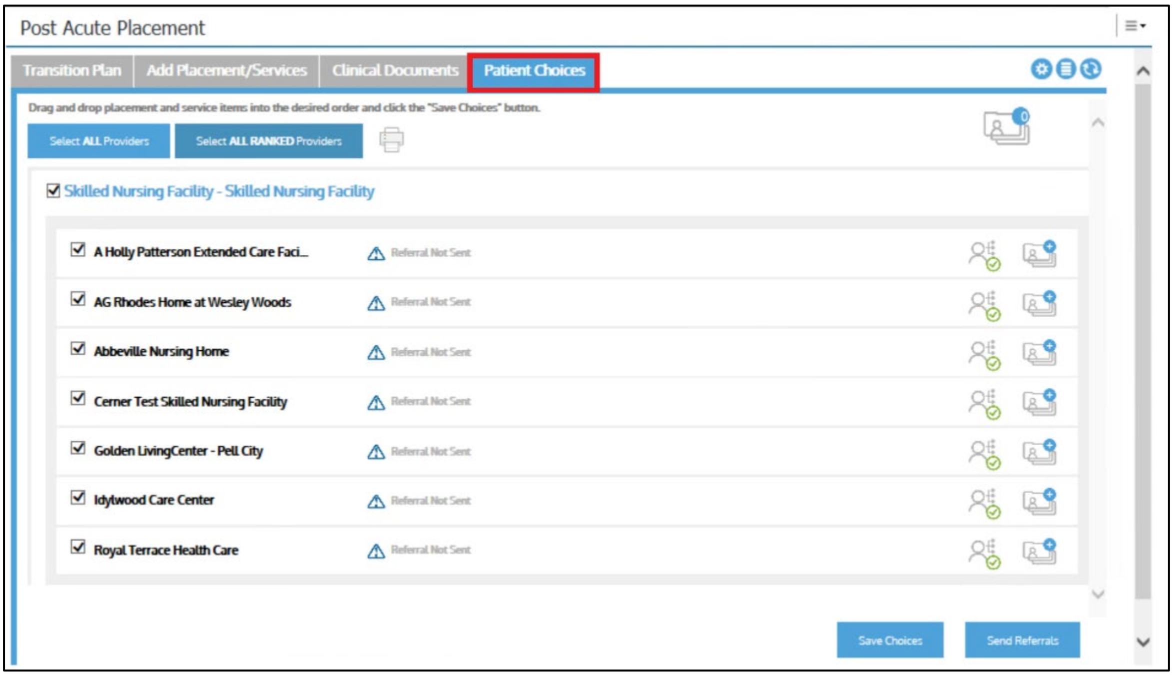
3. Click **Send Choice Link**.

Figure 113. Detail of Send Choice Link button



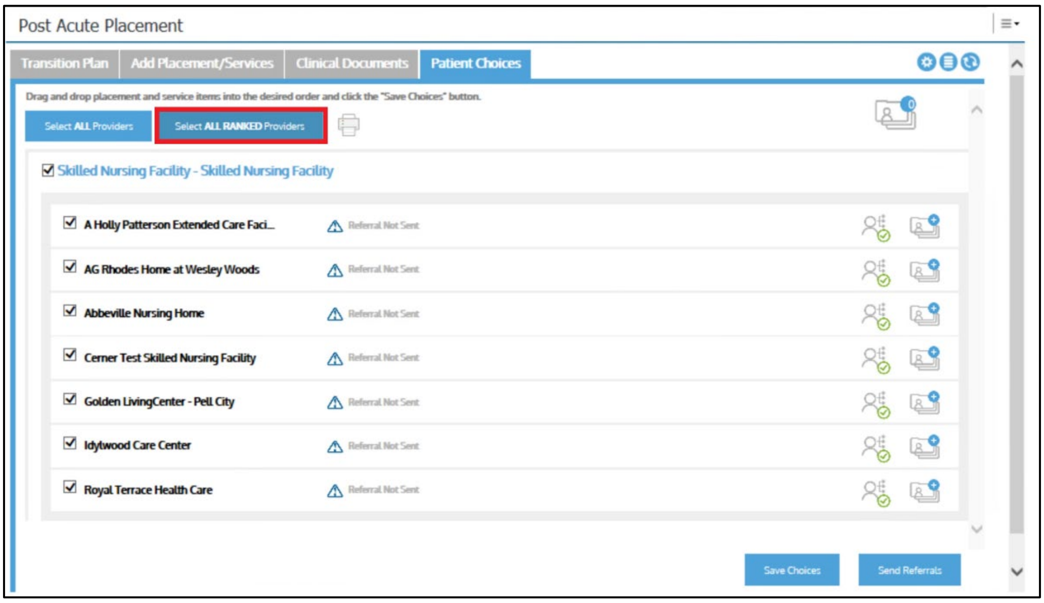
The patient/family that received the link will complete the ranking within Choice. Once completed, their ranked choices will appear on the **Patient Choices** tab.

Figure 114. Detail of Patient Choices tab



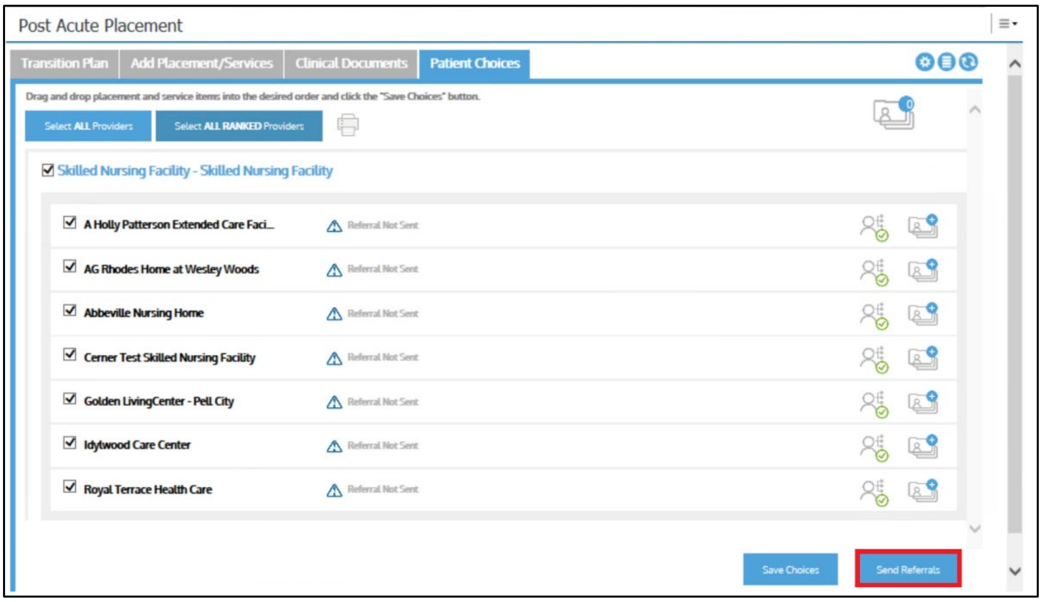
4. To send referrals from the **Patient Choices** tab based on the patient's selections, click **Select ALL RANKED Providers**.

Figure 114. Detail of Select ALL RANKED Providers button



5. Click **Send Referrals.**

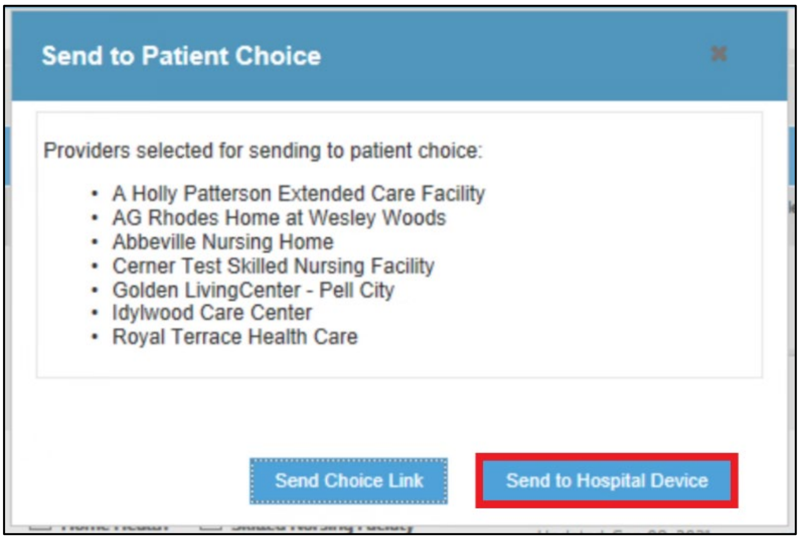
Figure 115. Detail of Send Referrals button



Send to Hospital Device workflow

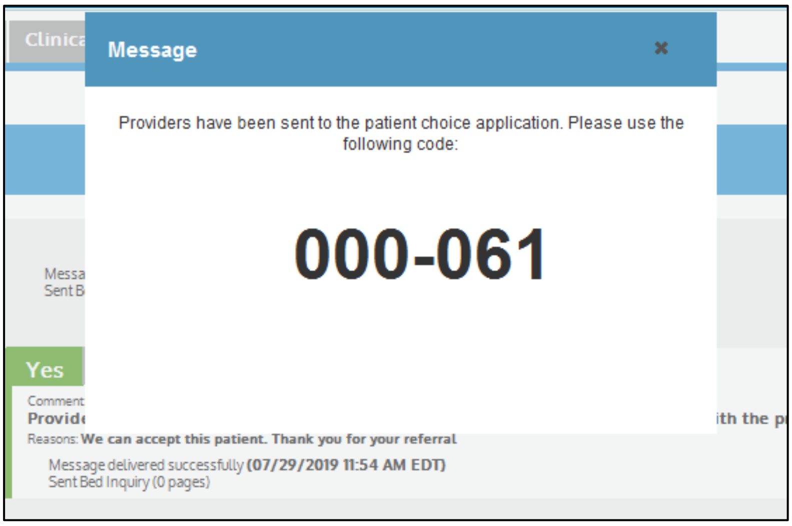
1. Click Send to Hospital Device.

Figure 116. Detail of Send to Hospital Device button



2. Enter the patient's MRN into the Ensocare Choice tablet.

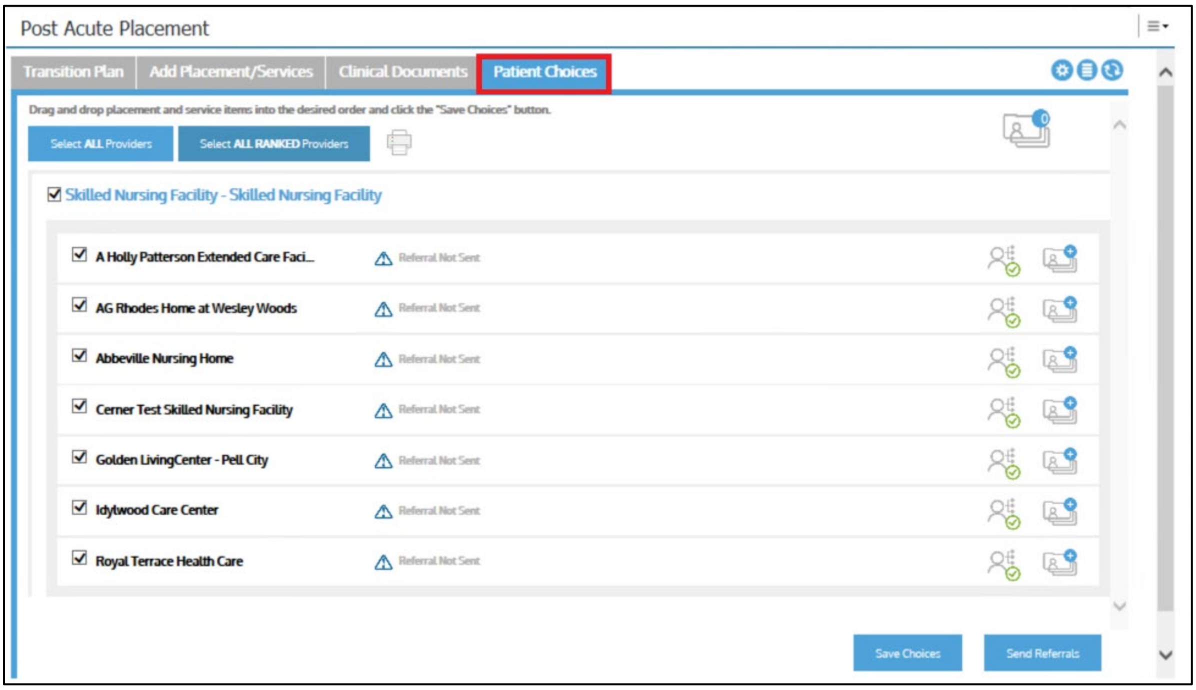
Figure 117. Detail of MRN



3. Give the tablet to the patient to rank the facilities or services they would like to book.

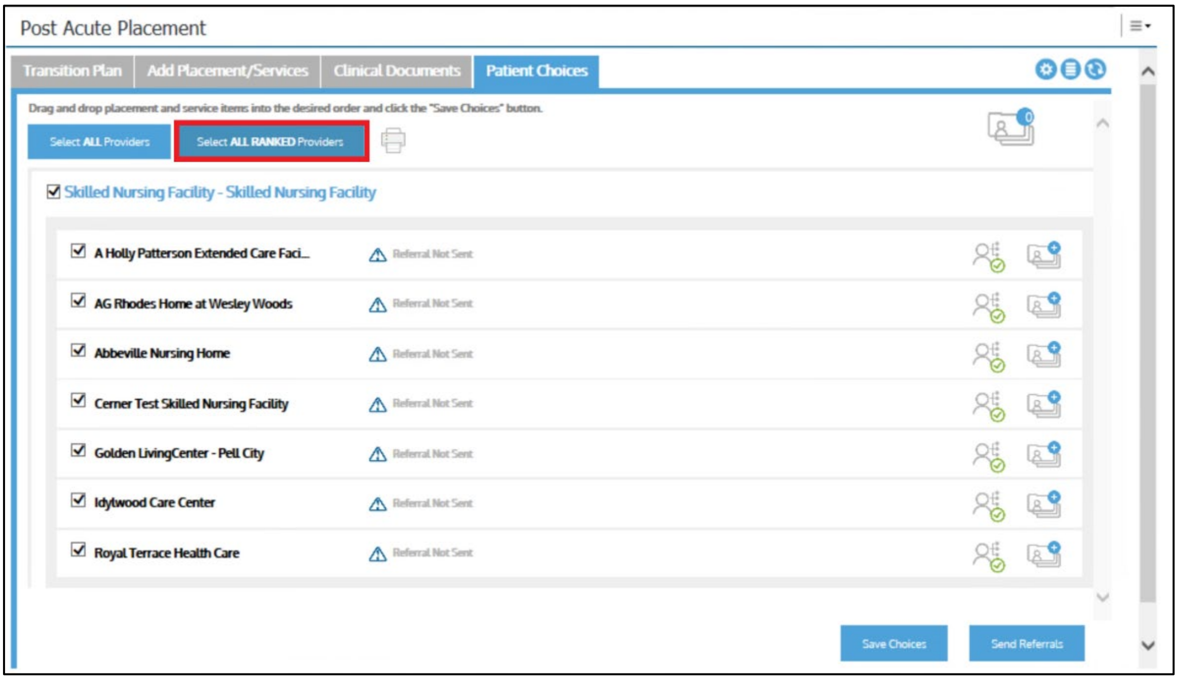
The patient/family that received the link will complete the ranking within Choice. Once completed, their ranked choices will appear on the **Patient Choices** tab.

Figure 118. Detail of Patient Choices tab



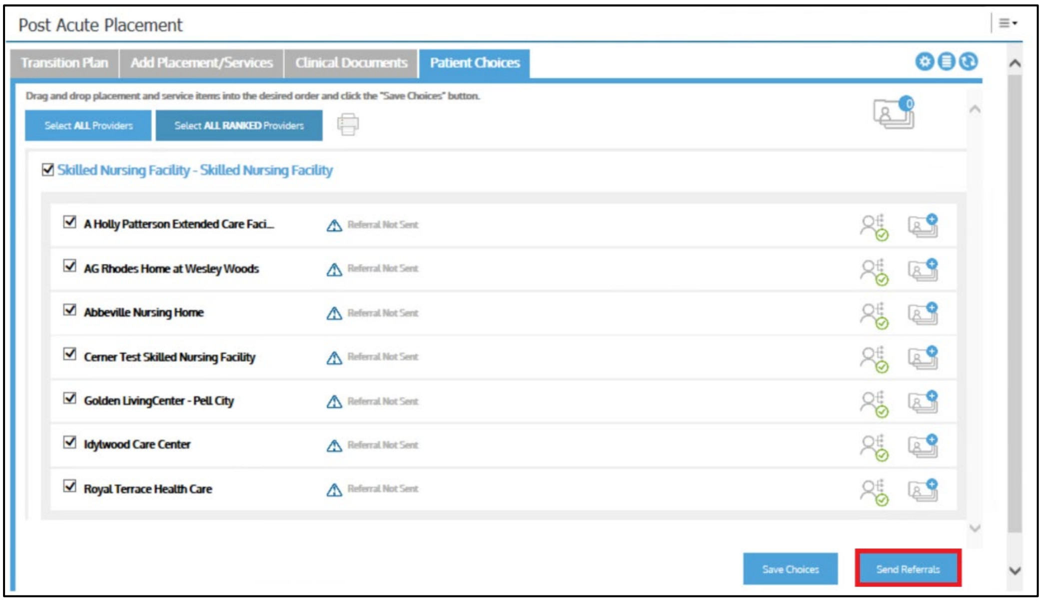
4. To send referrals from the **Patient Choices** tab based on the patient's selections, click **Select ALL RANKED Providers**.

Figure 119. Detail of Select ALL RANKED Providers button



5. Click **Send Referrals.**

Figure 120. Detail of Send Referrals button

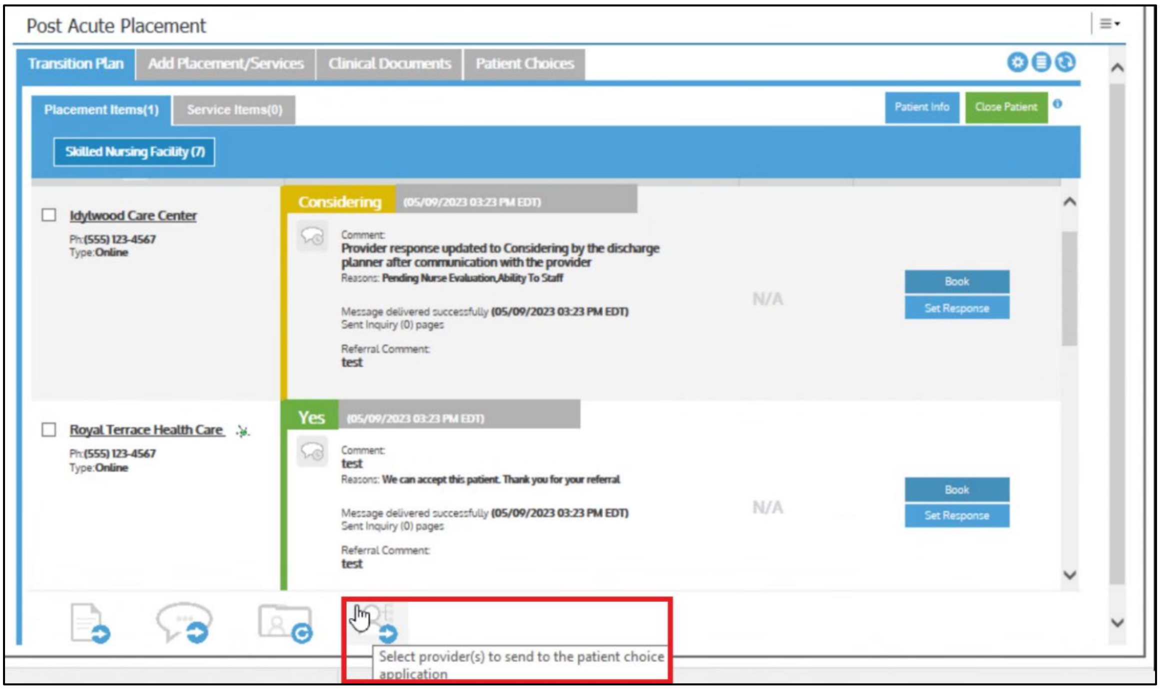


Workflow #2: Send to Patient Choice Application After Sending Referrals

This workflow allows users to communicate with post acute providers and ensure they can take a patient before documenting a patient's choices. This will allow the patient to select from the list of accepted providers.

1. Follow the normal workflow of uploading clinicals and sending them to providers.
2. The referrals that have been sent will appear in the **Transition Plan** for the patient.
3. Select the providers with the **Yes** response and click **Send to Patient Choice Application**.

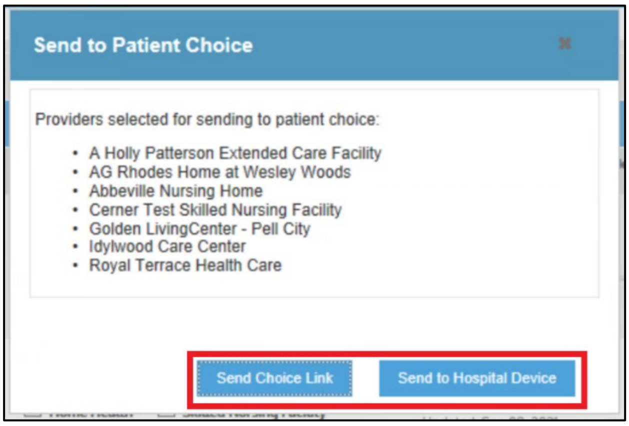
Figure 120. Detail of Select Provider(s) to send to the patient choice application button



After clicking **Send to Patient Choice**, users can select the providers with the "Yes" response and click **Send Choice Link** or **Send to Hospital Device**.

Using the **Send Choice Link** button will allow users to send a link via text or email and **Send to Hospital Device** will allow users to send the post acute providers to a hospital owned Ensocare Choice tablet.

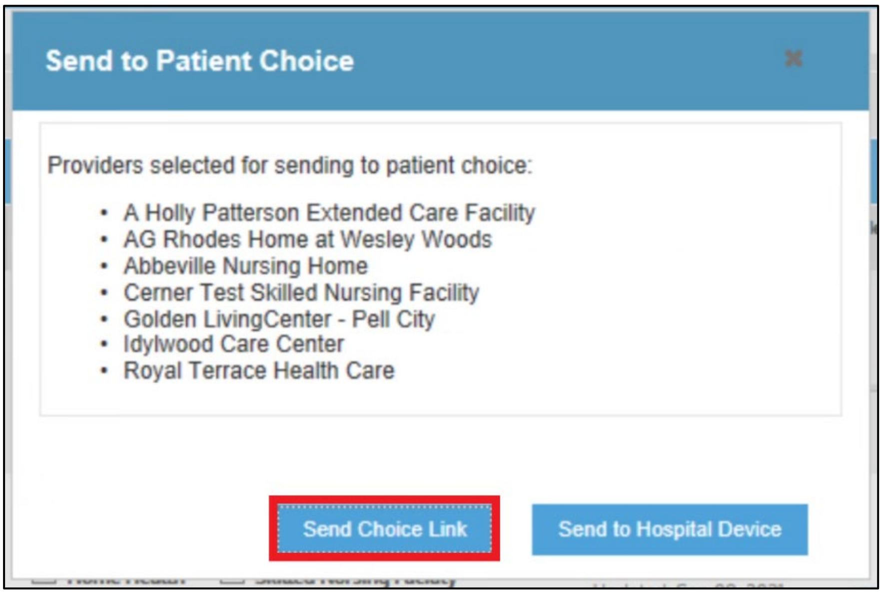
Figure 122. Detail of Send Choice Link and Sent to Hospital Device buttons



Send Choice Link Workflow

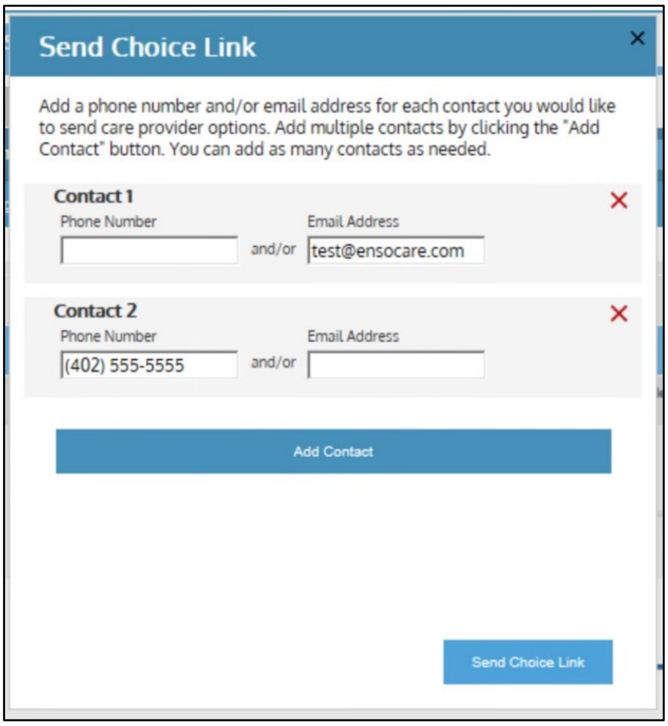
1. Click **Send Choice Link**.

Figure 123. Detail of Send Choice Link button



2. Enter the phone number and/or email address to send the Choice Link to.

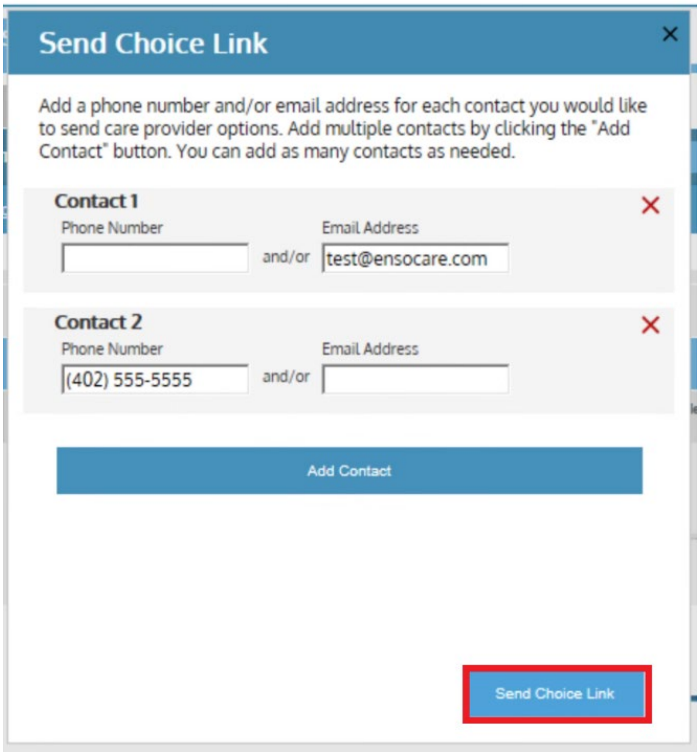
Figure 124. Detail of contact information



Note: Users can add additional contacts by clicking on Add Contact and remove a contact by clicking the r ed X next to their line.

3. Click **Send Choice Link**.

Figure 125. Detail of Send Choice Link button

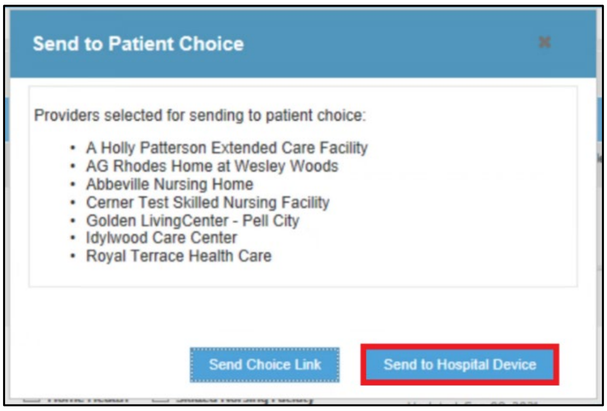


The patient/family that received the link will complete the ranking within Choice. Once completed, their ranked choices will appear on the **Patient Choices** tab.

Send to Hospital Device workflow

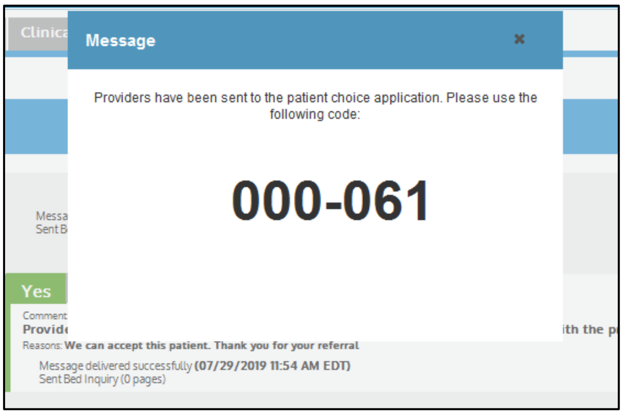
1. Click Send to Hospital Device.

Figure 126. Detail of Send to Hospital Device button



2. Enter the patient's MRN into the Ensocare Choice tablet.

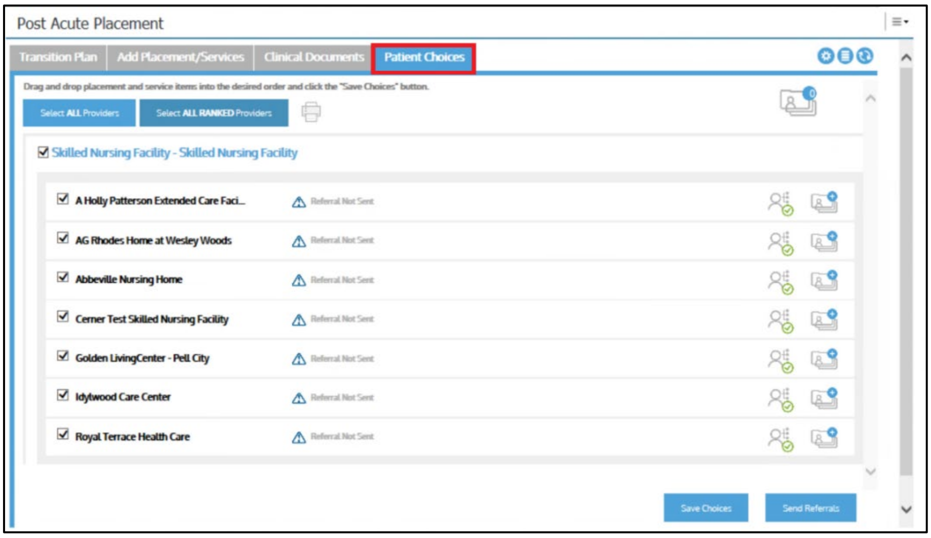
Figure 127. Detail of MRN



3. Give the tablet to the patient to rank the facilities or services they would like to book.

Once completed, their ranked choices will appear in the **Patient Choices** tab.

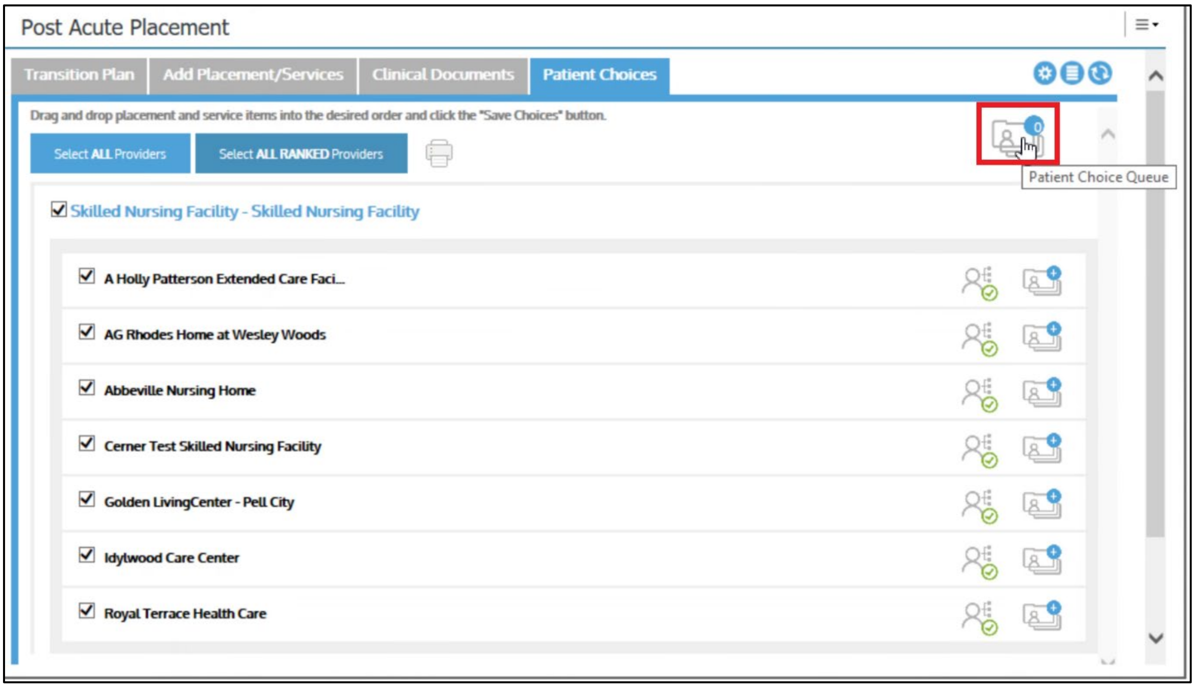
Figure 128. Detail of Patient Choices tab



Resend to Patient Choice Application

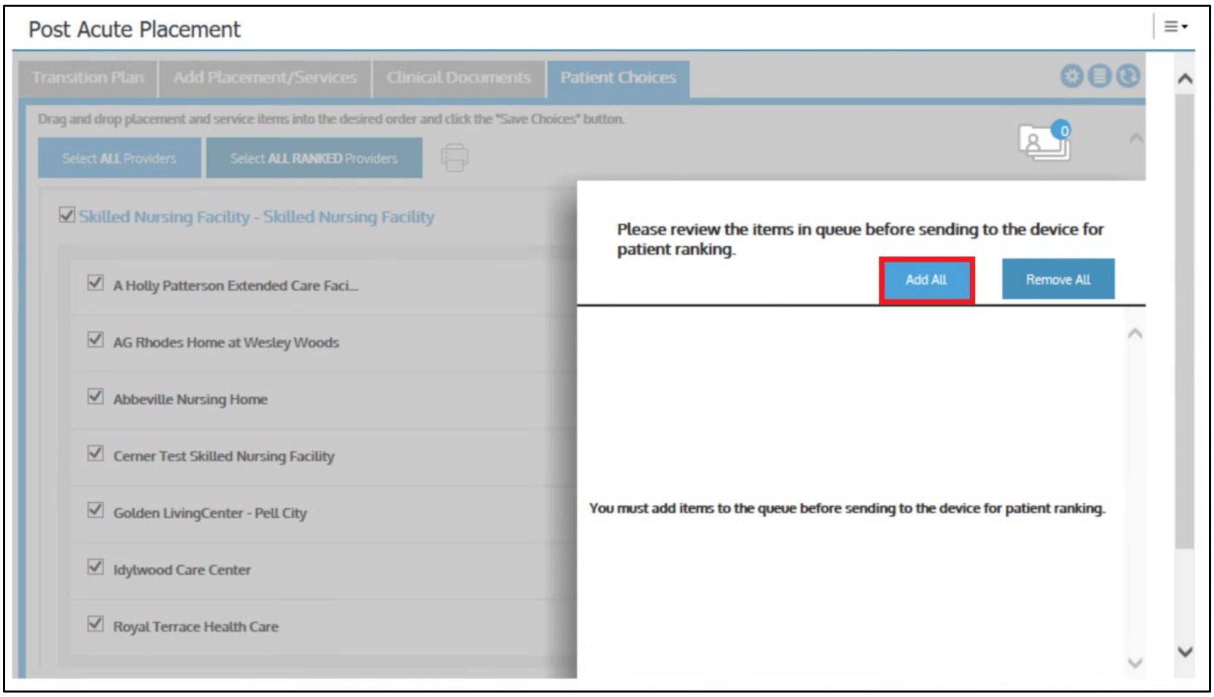
1. Click the **Patient Choices** tab.
2. Click **Patient Choice Queue** to review all the selected providers.

Figure 129. Detail of Patient Choice Queue button



3. Click **Add All** to add all the post acute providers from the Patient Choice screen to the Patient Choice Queue.

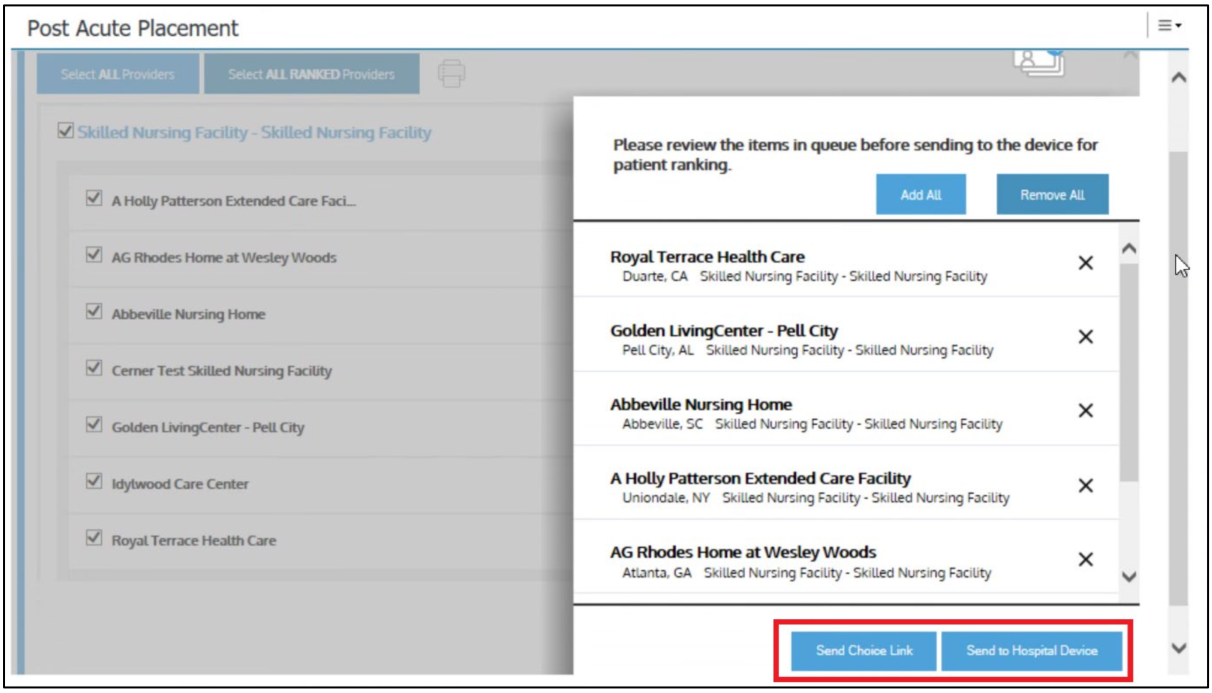
Figure 130. Detail of Add All button



Note: Clicking **Remove All** will remove all the post acute providers from the Patient Choice Queue. Click the X next to the item to remove from the queue.

4. Depending on the workflow, click **Send Choice Link** or click **Send to Hospital Device**.

Figure 131. Detail of Send Choice Link and Send to Hospital Device buttons



Managing and Printing Patient Choices

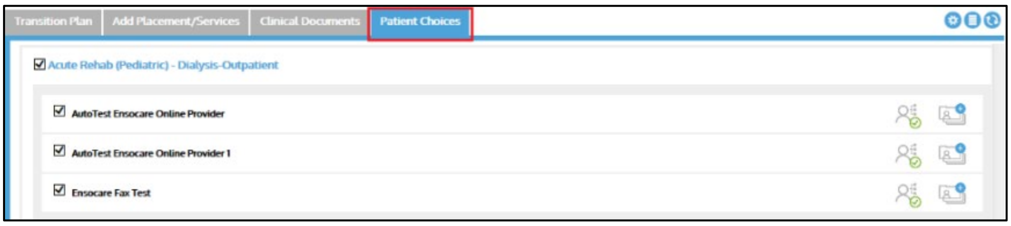
A user can save choices for the patient, or make updates as needed. Users can drag and drop providers in rank order based on patient preference within each level of care.

<u>Rank Patient Choices</u>

To rank Patient choices:

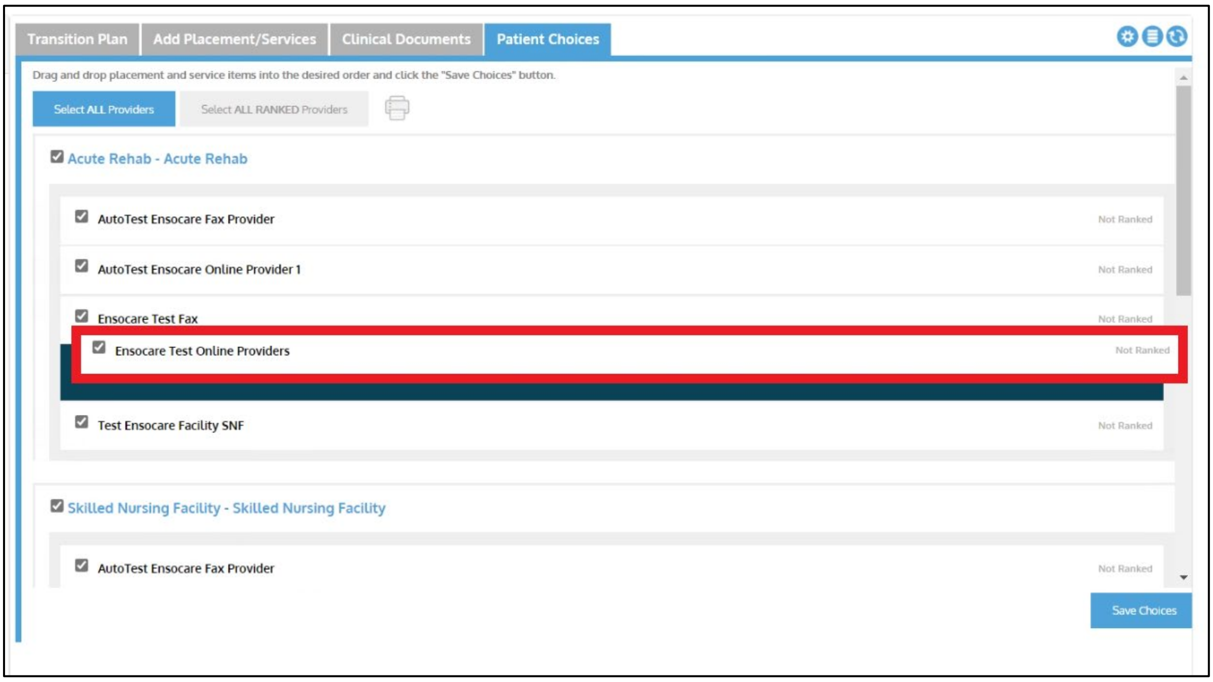
1. Click the **Patient Choices** tab to view the available providers for ranking.

Figure 132. Detail of Patient Choices Tab



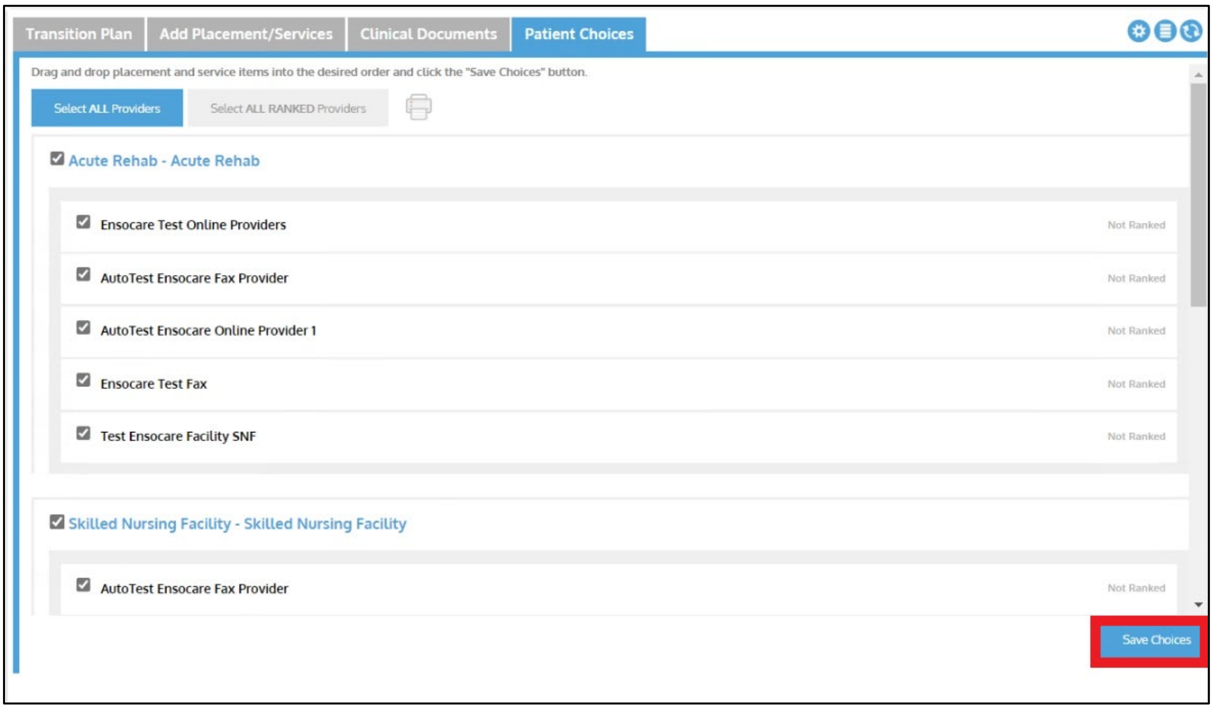
2. Drag and drop the providers in the order based on the Patient's ranking.

Figure 133. Detail of Ordering Providers



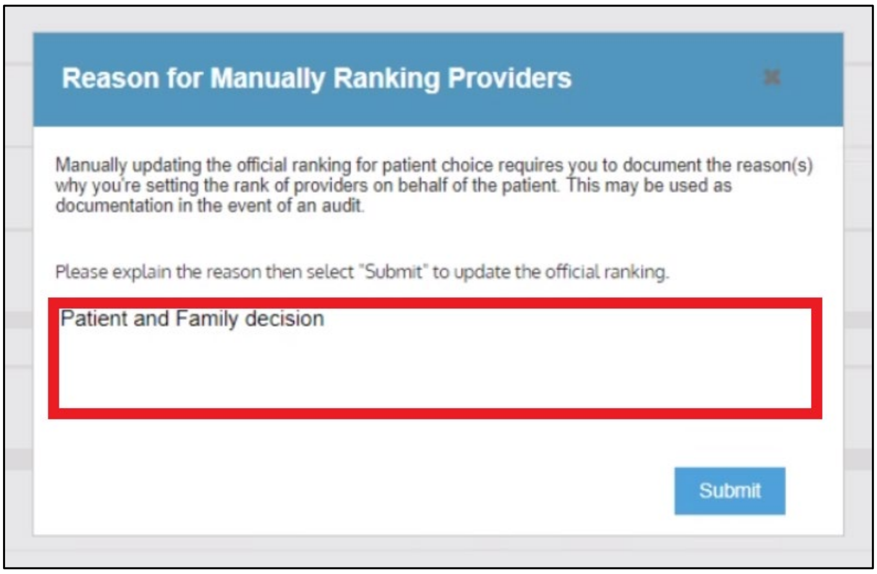
3. Click the **Save Choices** button in the bottom-right corner of the screen.

Figure 134. Detail of Save Choices button



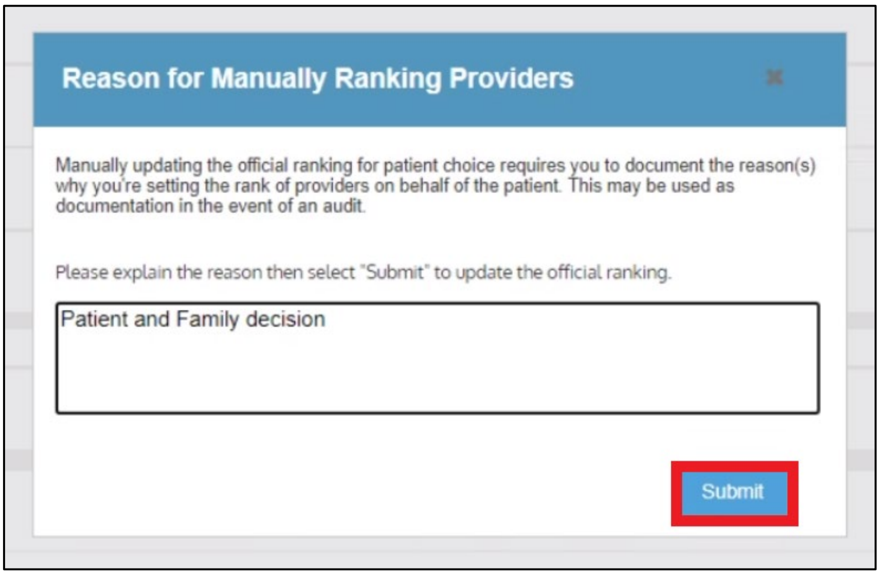
4. A dialog box will appear. In the dialog box, document the reason for manually ranking the providers.

Figure 135. Detail of Reason example



5. Click the **Submit** button in the bottom-right corner of the dialog box.

Figure 136. Detail of Submit icon



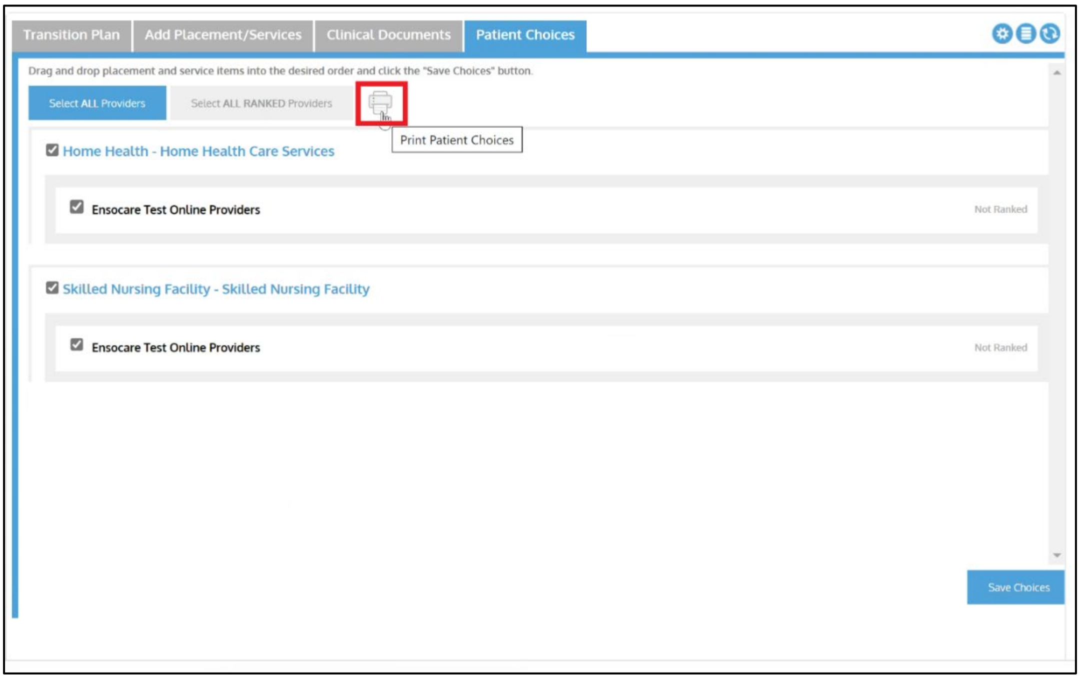
Print Patient Choices

Users can generate a version of this page to print. The generated printer-friendly page can be used to physically document the Patient's signature, upload into the Patient's chart for documentation, or to meet any other Patient choice documentation requirement.

To print Patient choices:

1. Select the post acute providers to display on the printout and click the **Print Patient Choices** icon.

Figure 137. Detail of Print Patient Choices icon



2. Click the three dots and click **Print**.

Figure 138. Detail of Print button