# Sticky Notes for Patient Care Management Staff

Sticky Notes

- Are used for interdepartmental communication regarding discharge planning, clinical review updates, and general information.
- Are not a legal form of documentation and do not become part of the permanent medical record.
- May be created and viewed from the Transition Planning Worklist, the UR Worklist, and the Care Management section of the patient chart.
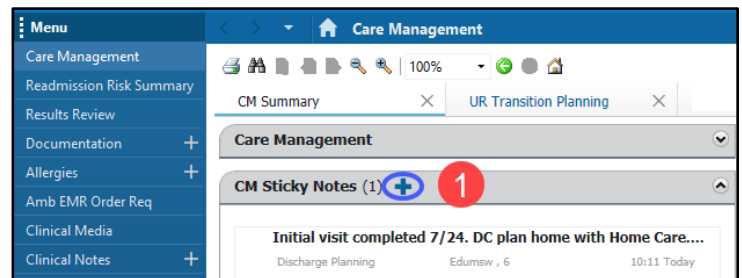
Viewing and Creating in Care Management

To View:

1. Select **Care Management** on the dark blue Menu of the patient's chart.

2. Select either **CM Summary** or **UR Transition Planning**.

3. Expand the CM Sticky notes folder by clicking on the arrow to view the information.
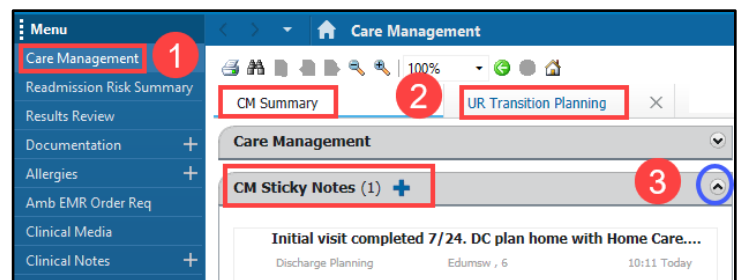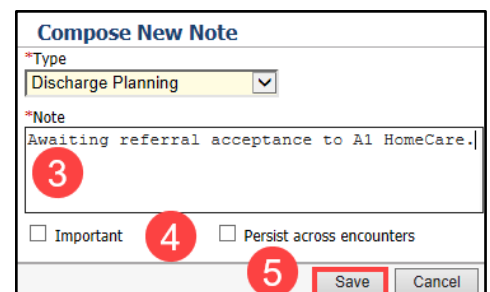

To Create:

1. Click the blue ➕ on the CM Sticky Notes folder.

2. Select the note **Type** from the drop-down menu.
   - Utilization Management notes will populate on the UR Worklist also.
   - Discharge Planning notes will also populate on the Transition Planning Worklist.
   - General notes will populate on both the UR Worklist and Transition Planning Worklists.
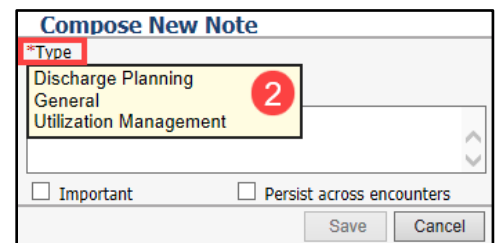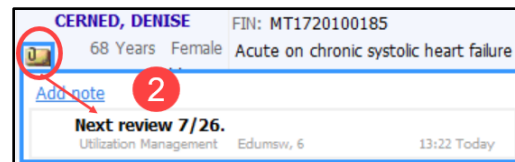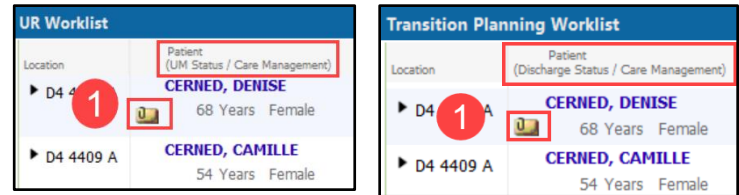

3. Enter documentation.

4. Optional feature is available to mark the sticky note as:
   - **Important** and/or **Persist across encounters**.

5. Click **Save**.

Sticky Notes for Patient Care Management Staff

## Viewing and Creating from the Transition Planning and UR Worklists

To View:

1. Locate the folder icon displaying in the Patient column (indicates a Sticky Note is present).
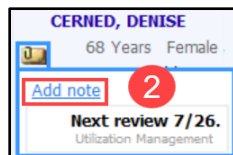
2. Hover over the folder icon to view the information.

To Create:

1. Hover over the folder icon displayed in the Patient column.

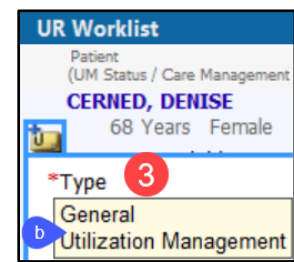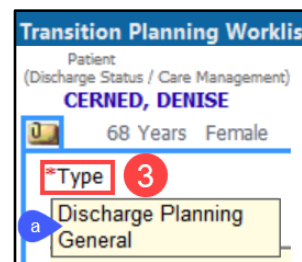   a. If a folder icon is not displayed, hover below and to the left of the patient name until the icon appears.
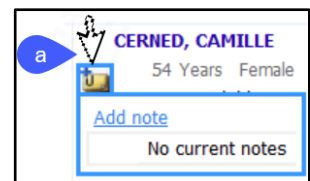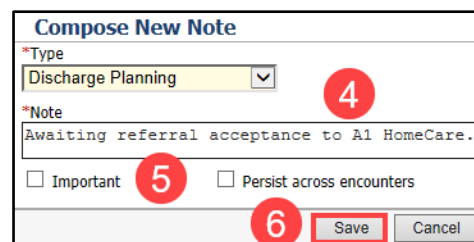
2. Click **Add Note**.

3. Select **Note Type:**
   a. When using the Transition Planning Worklist, select
      - Discharge Planning or
      - General

   b. When using the UR Worklist, select
      - General or
      - Utilization Management

4. Enter documentation.

5. Optional feature is available to mark the sticky note as:
   - **Important** and/or **Persist across encounters**.

6. Click **Save**.

- Utilization Managements notes also populate on the UR Worklist.
- Discharge Planning notes also populate on the Transition Planning Worklist.
- General notes populate on both the UR and Transition Planning Worklists.