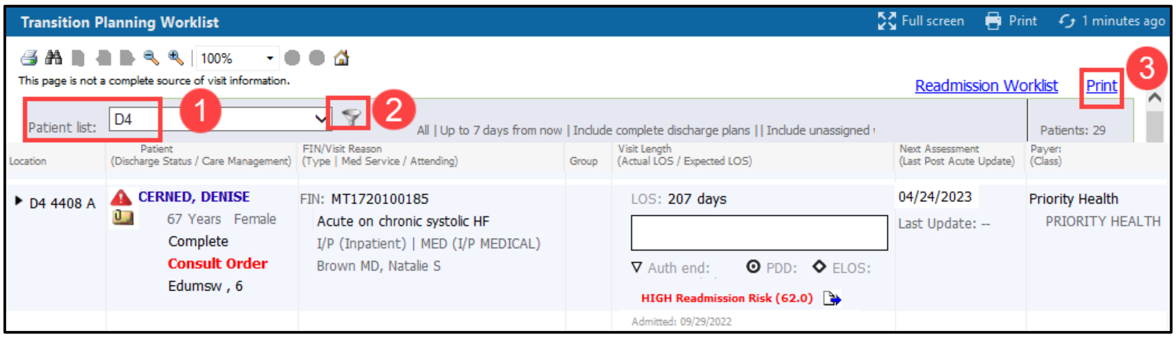
Transition Planning Worklist for Patient Case Managers

Overview

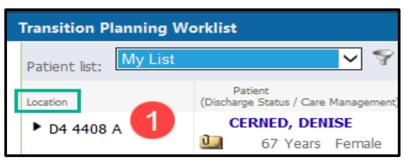
The Transition Planning Worklist is the online work organizer for Case Managers.

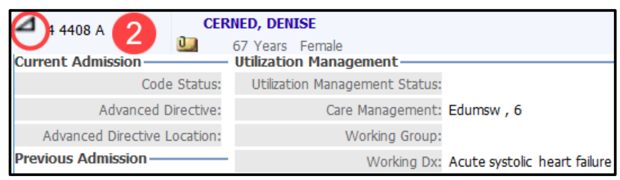
1. The Patient List may be organized by unit or custom list.
2. Filters need to be set initially for information to populate the Worklist.
3. Print the list daily for workload organization and reference.



Location Column

1. The Location column displays:
   - Unit name
   - Room number
   - Patient bed



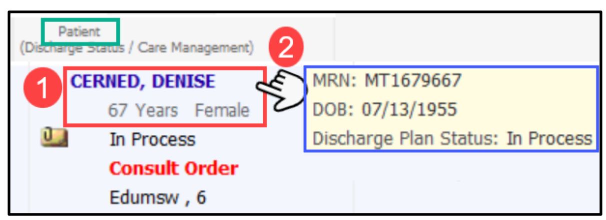


2. Click the caret to expand the view.

Patient Column

1. Click on the patient's name to open the chart.

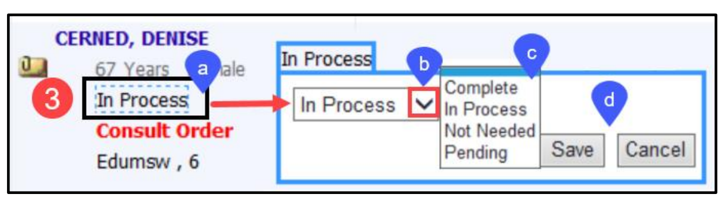
2. Hover over the patient's name to view:
   - MRN: Medical Record Number
   - DOB: Date of Birth
   - Discharge Plan Status



3. Discharge Plan Status:

   To modify:

   a. Click the displayed status text to open the modification window.
   b. Click the drop down arrow.
   c. Select the new discharge plan status.
   d. Select Save or Cancel.



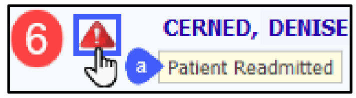
4. Hover over **Consult Order** to view current referrals.

5. The assigned Case Manager name displays.

6. Hover over icons that are present to view information.
   a. The red alert indicates hospital readmission.

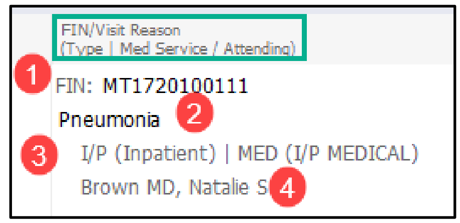
   b. The folder indicates a Sticky Note. Hover to view.

   c. Click **Add Note** to document a new Sticky Note.



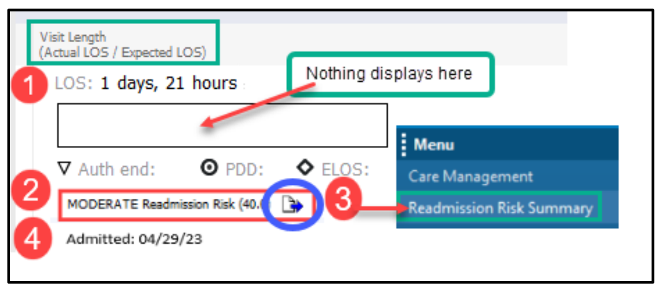
FIN/Visit Reason Column

1. FIN: Financial Institution Number.
   - A new FIN is associated with each Munson facility encounter.
2. Reason for this hospital visit.
3. Indicates Patient Status for this encounter.
4. Attending Physician.



Visit Length Column

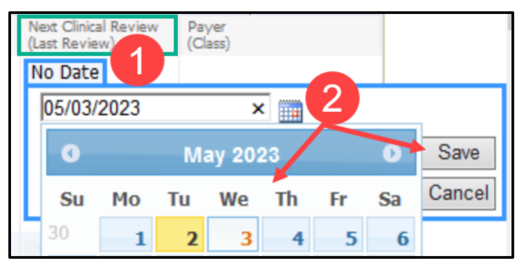
1. LOS: Length of stay this hospital encounter.
2. Readmission Risk level and score display here.
3. The paper icon is a hyperlink to the Readmission Risk Summary on the dark blue Menu in the patient's chart. The icon displays when a Readmission Risk score is present.
4. Date of this hospital admission.



Next Clinical Review Column

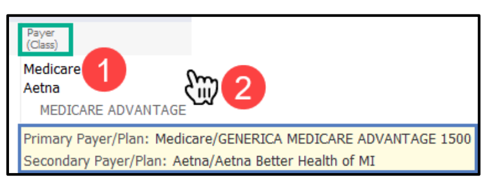
To add the **Next Clinical Review** date for insurance authorization:

1. Click into the field displaying **No Date.** A calendar icon will appear.
2. Click the calendar icon to view and select a date. Save or Cancel.



Payer Column

1. Health Insurance displays.
2. Hover over the insurance name to view the Primary and Secondary Payer/Plan.



3. View insurance plan numbers and contact information from the **Insurance** section of the dark blue Menu in the patient's chart.