

Transition Planning Worklist for Patient Case Managers

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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.

Transition P	lanning Worklist				💱 Full screen 🛛 🖶 Pr	int 🥠 1 minutes ago
A his page is not a	a complete source of visit information.	All Up to 7 days from nov	/ Include	e complete discharge plans Include unassigned	Readmission W	Orklist Print Patients: 29
Location	Patient (Discharge Status / Care Management)	FIN/Visit Reason (Type Med Service / Attending)	Group	Visit Length (Actual LOS / Expected LOS)	Next Assessment (Last Post Acute Update)	Payer: (Class)
▶ D4 4408 A	CERNED, DENISE Complete Complete Consult Order Edumsw , 6	FIN: MT1720100185 Acute on chronic systolic HF I/P (Inpatient) MED (I/P MEDICAL) Brown MD, Natalie S		LOS: 207 days ✓ Auth end: O PDD: ♦ ELOS: HIGH Readmission Risk (62.0)	04/24/2023	Priority Health PRIORITY HEALTH
				Admitted: 09/29/2022		

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.











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Insurance

Transition Planning Worklist for Patient Case Managers

- 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.



FIN/Visit Reason (Type | Med Service / Attend

Brown MD, Natalie S 4

I/P (Inpatient) | MED (I/P MEDICAL)

FIN: MT1720100111
Pneumonia







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