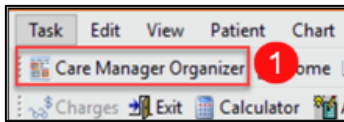# Dashboard Overview and Case List Management for Care Managers
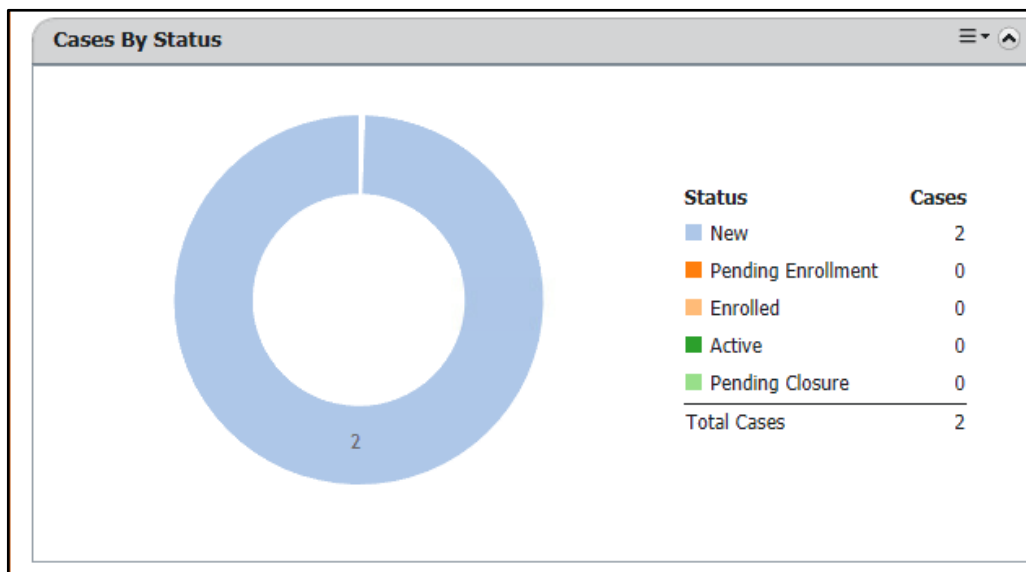
Cerner PowerChart Ambulatory **EDUCATION**

Accessing the Care Manager Organizer

1. Open the Care Manager Organizer.

Case by Status

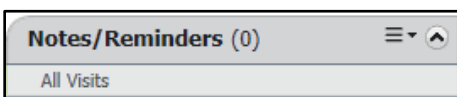New – Case(s) that have been assigned to the care manager, but no action has been taken.

Pending Enrollment – Case(s) that are opened but the Enrollment and Consent portion has not been completed.

Enrolled – Consent and Enrollment are completed, but a care management encounter needs to be completed.

Active – A care management encounter is complete, and the care manager is actively working with the patient.

Pending Closure – The initial identification reason is no longer applicable; the patient cannot be reached, or the patient has declined services.

Notes/Reminders

This component displays reminders assigned to the care manager.
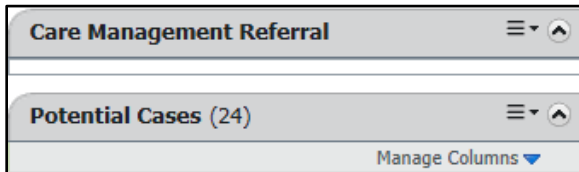
Organizer Observation Notifications
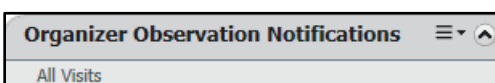
The Organizer Observation Notifications shows a list of patients (in any status) that have recently had contact with the emergency department or inpatient setting. This information can be sorted by notification type and date.
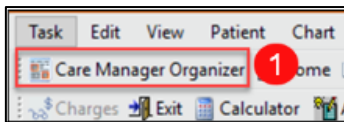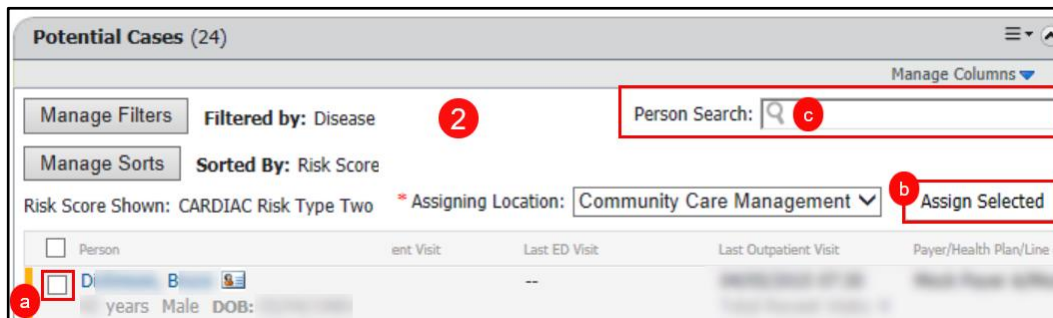
Care Management Referrals

Care Management Referral allow manual assignment of patients.

Potential Cases are identified by three algorithms: Disease Management, High Risk Adult and PMCA – Complex Chronic Care Management(Peds).
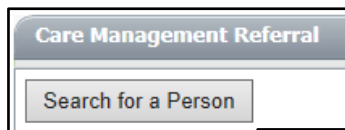
Add a Patient to Case List

1. Open the Care Manager Organizer.

2. Add the patient from the Potential Case list.
a. Click on the box next to the patient's name.
b. Click Assign Selected.
OR
c. Search for a specific patient by entering the name in the search field.

3. If a referral is received, the patient can be added manually, by clicking on Search for a Person within the Care Management Referral tab. The Enter Case Details window will open.
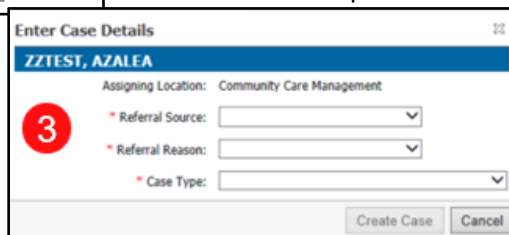
a. Enter the required details.
b. Click Create Case.

Adjust Filters to Search for Eligible Patients Suggested by Automated Record Review

The system will automatically search for patients that are high risk and add these patients to the Potential Cases list. This task may yield high numbers of patients, which can be narrowed down through filters.

1. Click the Manage Filters button within the Potential Cases tab, to locate patients.

a. Select the desired Program from the drop-down menu.
b. Select the desired Health Plan from the drop-down menu.
c. Click Apply.

2. Click the Manage Sorts button to further sort the patient list.

a. Select the desired Primary Sort from the drop-down menu.
b. Click Apply.

Viewing Potential Case Information

1. Within the Potential Cases tab, click on the patient's name to open the patient's chart.
2. Click on the Program Identified hyperlink to open the Potential Case Details (image below).
3. Click on the View Visit Details hyperlink to view the patient's Last ED Visit.
4. Click on the View Visit Details hyperlink to view the patient's Last Outpatient Visit.

Viewing Patient Information from the Case List

1. Within the Case List tab, patient information can be viewed at a glance by clicking in the field next to the patient's name.

Note: Clicking on the patient's name will open the patient's full chart. Click in the blank portion of the field next to the patient's name will open to the preview pane.

2. Click on the Filter button.
3. A commonly used filter is Communication Events Duration This Month. This will assist with Medicare and care coordination billing.