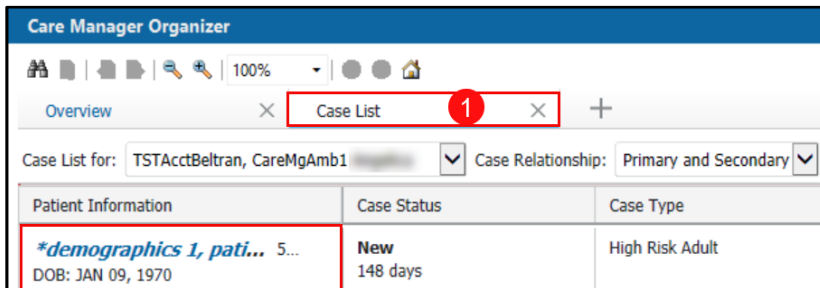


# Care Manager Documentation Overview for Care Managers

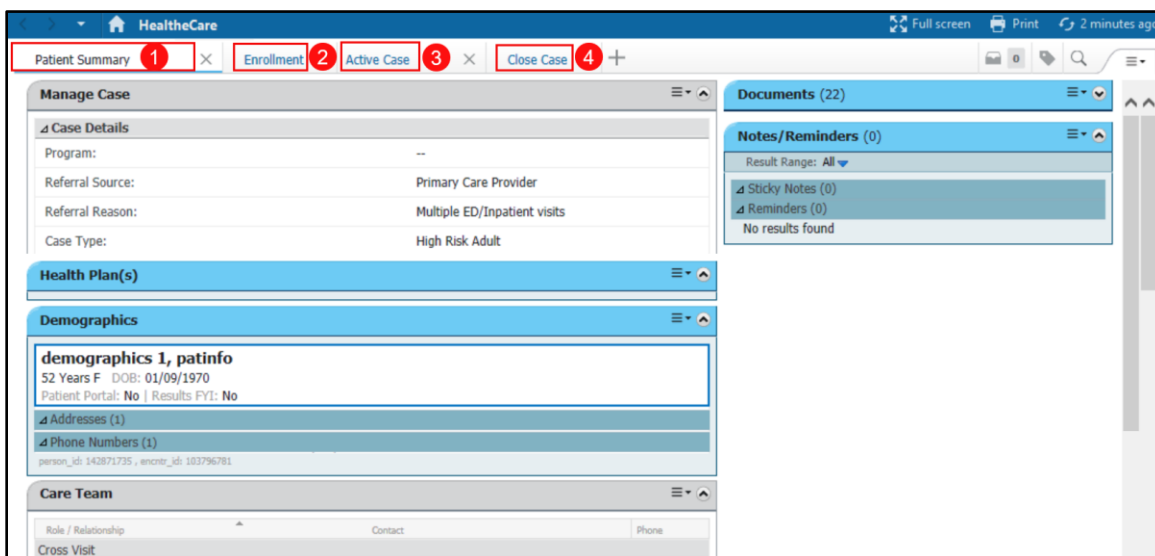
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## Case List Overview



1. Within the Care Manager Organizer, select the Case List tab to view assigned patients

## HealthCare Component Overview

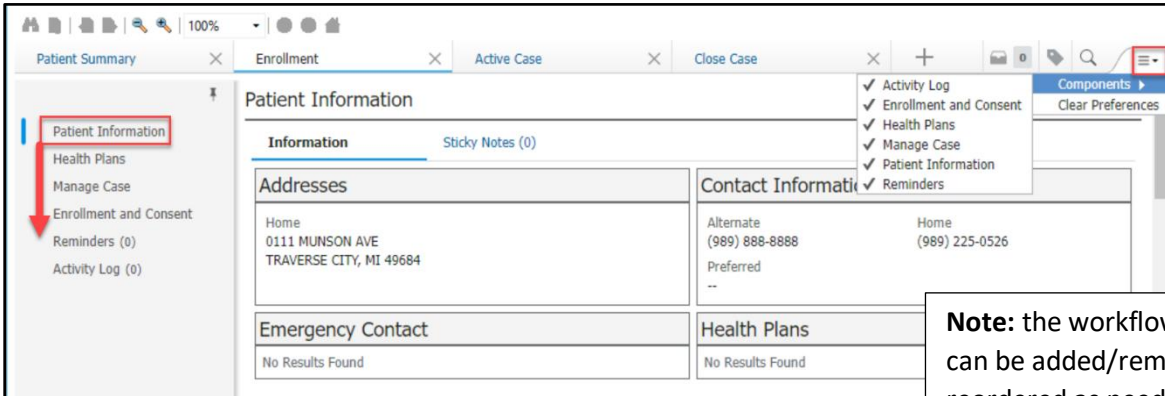


1. Patient Summary tab – includes information at a glance including: Case Details, Health Plan(s), Demographics, Care Team, Documents, and Notes/Reminders.
2. Enrollment tab – Includes Activity Log, Consents and Reminders for initial patient interaction.
3. Active Case tab – Includes Activity Log for on-going patient interactions and documentation.
4. Closed Case tab – Prior Case Information.

# Care Manager Documentation Overview for Care Managers

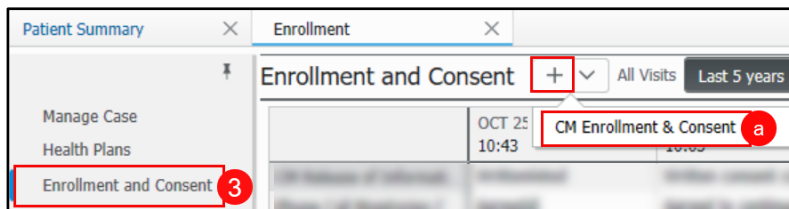
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## Initial Patient Outreach

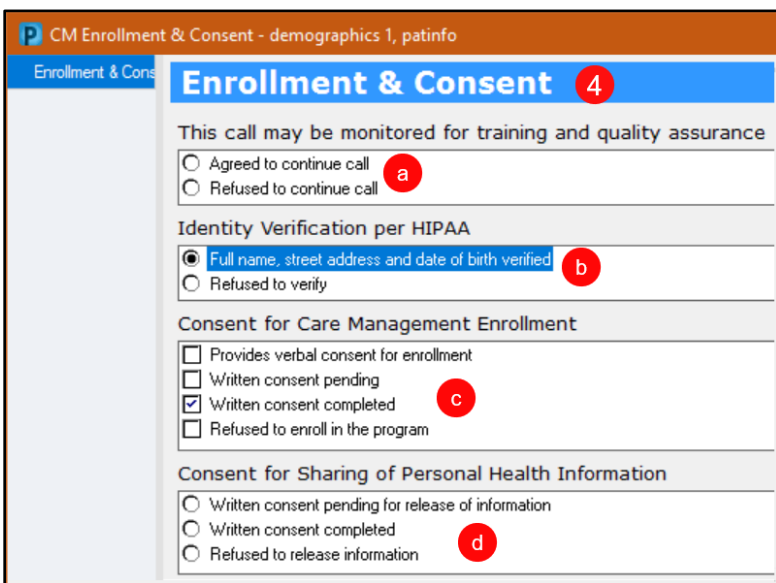


Select the Enrollment workflow after opening the chart by selecting the patient's name in the Case list.

**Note:** the workflow components can be added/removed or reordered as needed.



1. Click on the Enrollment and Consent Component.
- a. Click on the plus sign next to the component name and then select CM Enrollment & Consent.



2. Complete the form and click the green check mark to sign.
- a. Field should be left blank.
- b. Required Field.
- c. Required Field.
- d. Field should be left blank as the release of information document should be on file.

## Add an Activity Log Entry

The Activity Log is used to document a brief record of the interaction with the patient. The Activity Log is the primary record for the duration and type of contact with the patient (this information is used for billing and productivity data).

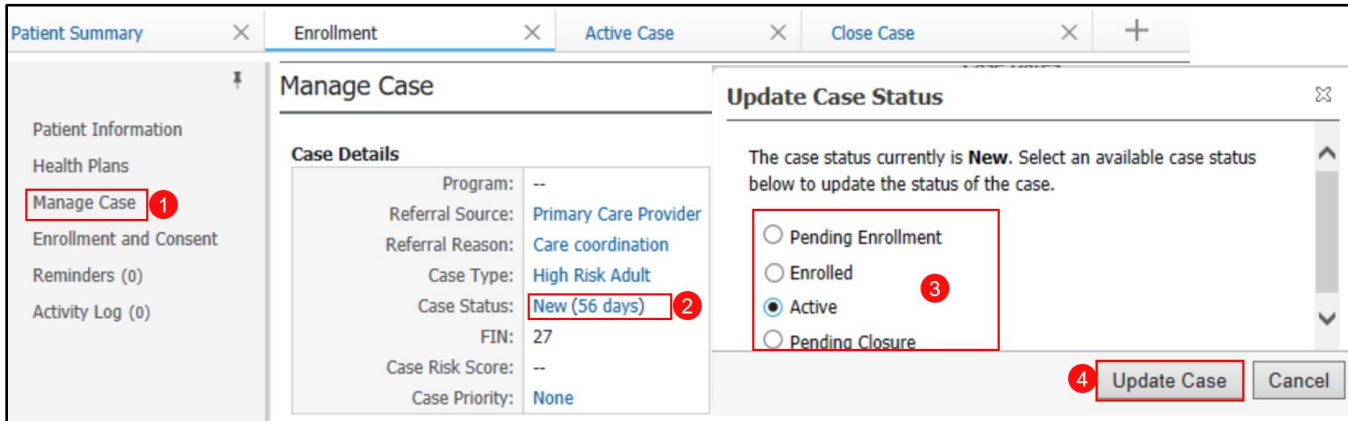
1. Select the Activity Log component.
2. Click the plus sign in the component header.
3. Complete the required fields.
4. Document a short summary of the interaction with the patient in the Notes field (this field has a 250-character limit).
5. Click Save.

**Note:** Duration, Method, Contact Type and Outcome are required field and will pull into the Case Summary Note. This information is required for billing.

# Care Manager Documentation Overview for Care Managers

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## Update Manage Case Component Status to Active



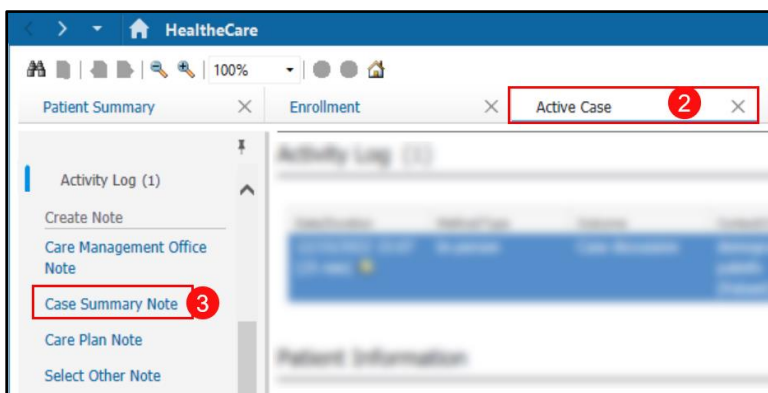
1. Click Manage Case.
2. Click the Case Status hyperlink.
3. Select Active.
4. Click Update Case.

**Note:** The patient will be automatically changed to Enrolled when the Consent form is completed. Pending Enrollment and Pending Closure are not required.

## Initial Encounter Documentation



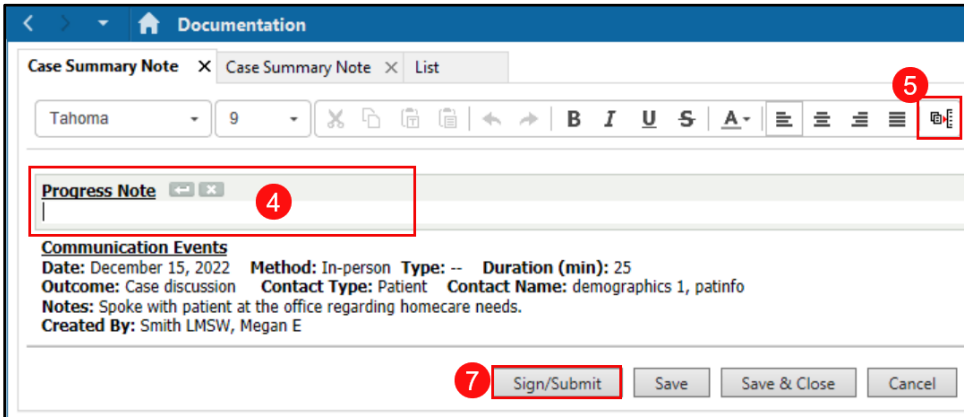
1. Click on the desired patient name to open the chart.



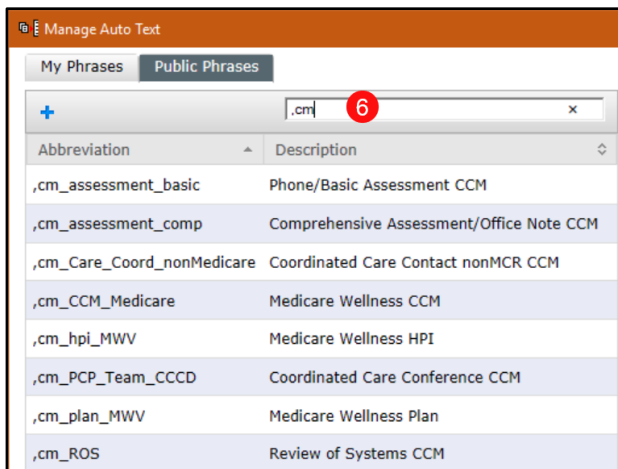
2. Click on the Active Case tab.
3. Scroll to the bottom of the component list and click on Case Summary Note.

# Care Manager Documentation Overview for Care Managers

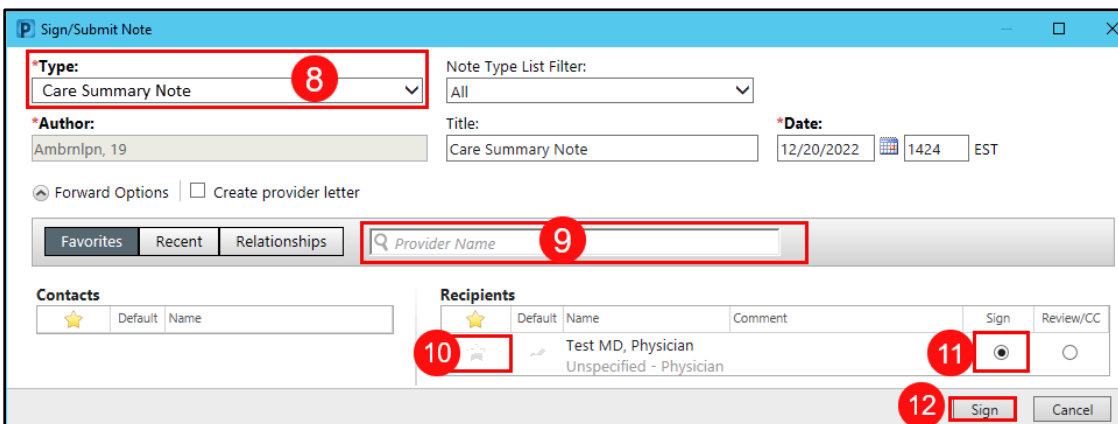
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4. Click on the Progress Note section.
5. Click on the Manage Auto text icon.



6. Within the Manage Auto Text window, search for the desired auto text as needed.
7. Click sign, when complete and the Sign/Submit Note pop-up will open.



8. Ensure that Care Summary Note is selected.
9. Search for the desired provider.
10. Click on the star to make the provider a favorite.
11. Click the Sign radial button.
12. Click Sign.

## Follow Up Documentation

1. Complete an Activity Log, the following are required fields:

- Duration – must be completed
- Method
- Contact type
- Notes (255 character limit)

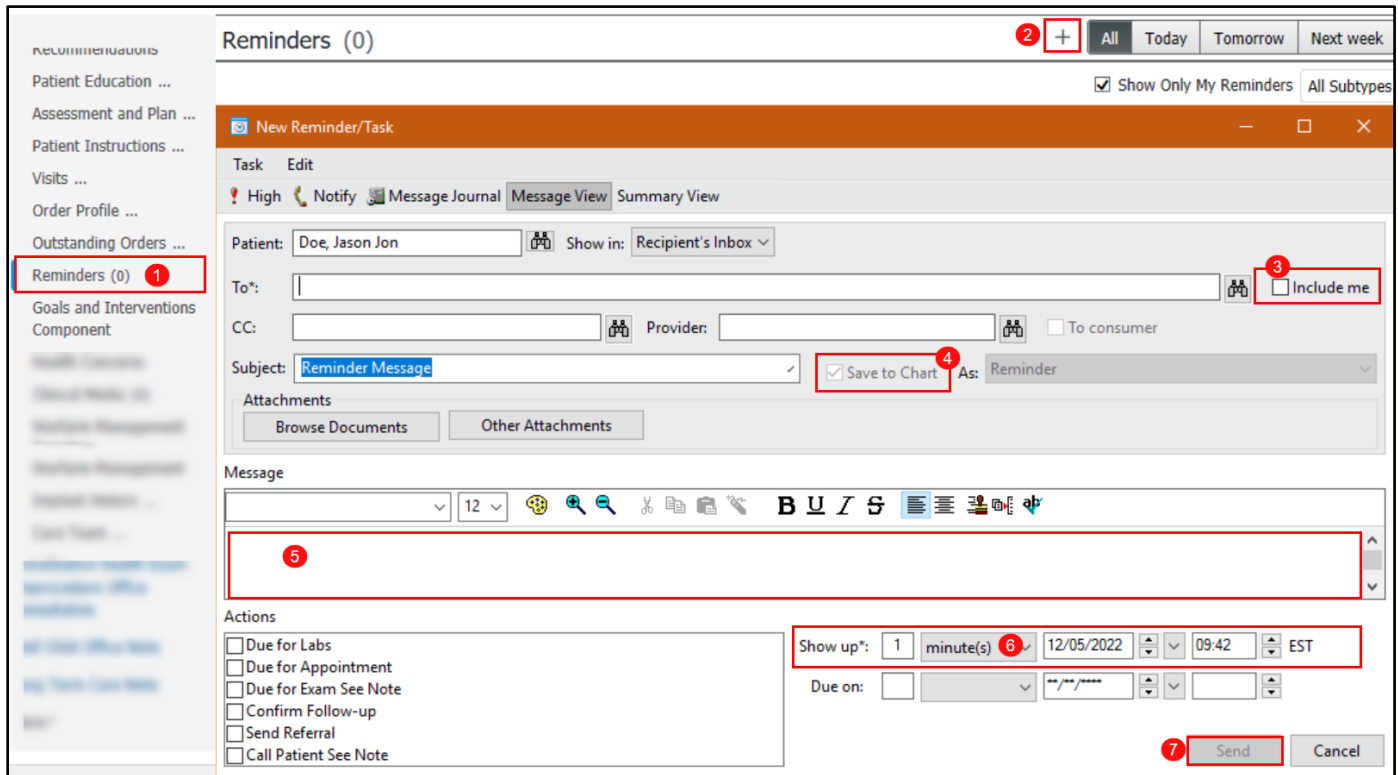
2. Complete a Case Summary Note:

- a. Ensure that Care Summary Note is selected.
- b. Search for the desired provider.
- c. Click on the star to make the provider a favorite.
- d. Click the Review/CC radial button.
- e. Click Sign.

3. Add a Reminder in the Reminders component, as needed.

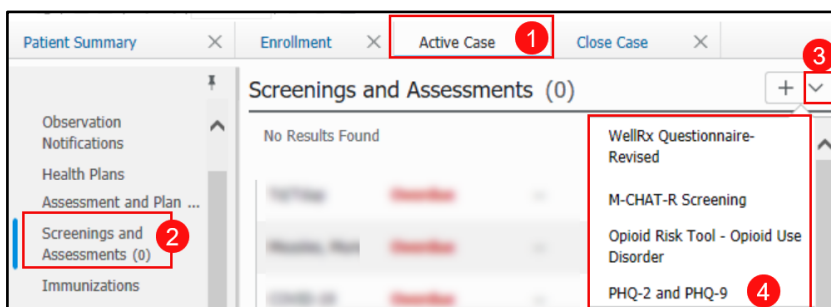
## Reminders

This component can be used to assist in planning for the next outreach.



1. Click on the Reminders component.
2. Click on the plus sign in the component header.
3. Ensure that the Include me box is checked.
4. Ensure that the Save to Chart box is checked.
5. Enter the message.
6. Set the Show up\* date and time.
7. Click Send.

## Screenings and Assessments



Screenings are not required as a part of each contact but can be documented as applicable.

1. Select the Active Case tab.
2. Select the Screenings and Assessments component.
3. Select the down-arrow in the component header line.
4. Select and complete the desired assessment.