From the Office of Health Informatics

Acute Care Management
Discharge Planning Worklist

July 28, 2025

The Discharge Planning Worklist is available to Care Management to assist in managing daily tasks.

Worklist Filters

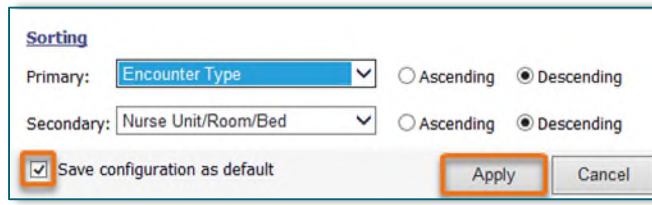
Within the Discharge Planning Worklist, click the filter button to display filter options.

- Filters are used to pull in the correct patients to the worklist.
  - **Encounter Type**, **FIN Class**, and **Payer** do not need to be modified unless the Care Manager is only working with a specific payer or insurance type.
  - **Relationship** – from the dropdown, select the desired relationship status to be pulled in.
    - **All** – patients who do not have a relationship with a Care Manager, patients with a relationship with other Care Managers, and patients that you have a relationship with, will display on the list.
      - **All** is the recommended filter.
  - Next Assessment:
    - From the dropdown, select the timeframe in which the Discharge Plan is due.
      - **All Future Assessments** is the recommended filter to select.
  - Include patients with:
    - **Completed discharge plan status:** Check this box to keep patients who have a completed discharge plan on the worklist.
    - **Not Needed Status**: Check this box to keep patients who do not need Care Management involvement on the worklist.
    - **No Next Assessment**: Check this box so patients without a next assessment due date documented will appear on the worklist.
    - **Discharge or Consult Orders with no assigned relationship**: Check this box so patients with a Discharge Order (DX) who have not had Care Management involvement populate on the worklist.
- **Sorting**
  - Sorting is an individual workflow decision by Care Managers.
    - **Primary** – from the dropdown, select how the list should be sorted.
      - It may be helpful to sort by **Encounter type**, so **Observation** patients appear at the top of the list.
    - **Secondary** – after the list is sorted by the primary selection, the list will be sorted by the secondary selection.

- If several nursing units are being covered by one Care Manager, sorting by **Nurse/Unit/Room/Bed** may be helpful.

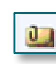
  - **Tertiary** – the **Discharge Planning Worklist** has a third option for sorting which may or may not be helpful.

NOTE: **Save configuration as a default should always be checked before clicking Apply. Each time the Filter Settings are opened, the box will default unchecked. If the configurations are not saved as default, each time the worklist is opened, the filters will need to be reset.**



- Click the wrench and green brush icon to modify **Patient Lists**. 

Hover Functionality

- **Patient name:** Displays the patient MRN, DOB, and the Discharge Plan Status.
- **Group (DRG) number**: Displays the name for the DRG.
- **Next Assessment column:** Select the notepad in the upper right corner to navigate to the **Discharge Planning MPage**. 
- **Insurance**: Displays additional patient insurance information.
- **Red triangle**: Displays various alerts. 
- **Yellow Note**: Appears when hovering in the **Patient** column and stays in view when a Care Management note has been documented. 
  - If a note has been created, hover over the note to view the last two notes documented.
  - If more than two notes have been created, all the notes can be viewed in the **Care Management Notes** component in the MPages.

Discharge Planning Worklist

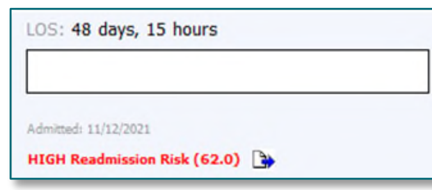
The **Discharge Planning Worklist** is used to manage Care Management consults and discharge planning.

- **Patient Column**
  - **Discharge Plan Status**: Displays below the patients age and gender.
  - **Not Available**: Indicates that a Discharge Plan Status has not been documented.
    - Click **Not Available** to add a Discharge Plan Status.
  - **Discharge Plan Status**: Updated from the worklist or the Care Management MPage component.
    - Both locations are updated when documented from either location.
- **FIN/Visit Reason**

- The FIN, encounter type, medical service, attending physician, and primary care physician are listed.

- **Group Column**
  - Displays the DRG number.
- **Visit Length**
  - LOS is displayed in days and hours.
  - Admission date is shown. If the patient has been readmitted, the date will display in red.

  - Readmission risk score is displayed as Low, Moderate, or High.
    - Click the link directly after the Risk Score to navigate to the patient's Readmission Risk Summary Page.



- **Next Assessment Column**
  - The timeframe in which the discharge plan is due displays. If the plan becomes overdue, the timeframe will turn red.
  - **Last Update**: A timeframe will populate when there is an update in WellSky (formally: CarePort, Curaspan, naviHealth) to prompt the Care Manager to open WellSky.
- **Payer Column**
  - Displays insurance/method of payment.

Printing the UM Worklist or Discharge Planning Worklist

- Click the blue **Print** link below the **Minutes Ago** button to print the worklist.

- Only the most recently documented **Care Management Sticky Note** will appear on the printed worklist.