The Acute Case Management Worklist reduces the need for Care Managers to toggle between multiple worklists. Key patient information has been consolidated into one worklist, improving Case Manager efficiency.

First Time Set Up

When accessing the **Acute Case Management Worklist** for the first time, Care Managers will select **List Maintenance** to select a patient list to display in the worklist.

➢ Using the **Patient List** dropdown, select the desired list from previously established patients lists.

- To add a new patient list or remove an existing list, select **List Maintenance**.
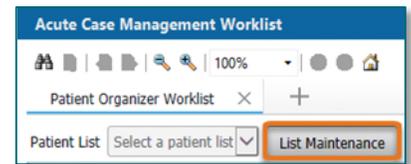
Configuring the Columns

STEP 1: To adjust column width, hover between columns to display the column editor. Click and drag column to desired size.

- ▪ To reset column widths, select **Reset column widths** in the Page Menu on the top right of the worklist.
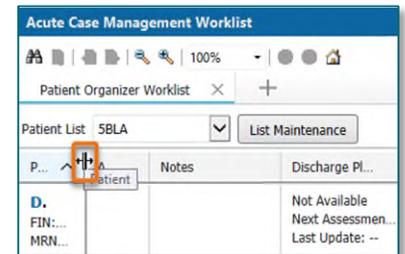
STEP 2: Users can modify the column order and remove columns. Navigate to the Page Menu and select **Layout Configuration**.

- ▪ Click the six dots to the right of the column name and drag to the desired location.
- ▪ Uncheck the box to the left of the column to remove the column from view. Columns can always be added back in to view at any time.
  - The **Patient** column is set in place and cannot be removed.
- ▪ Once desired layout is completed, select **Apply** to display changes.
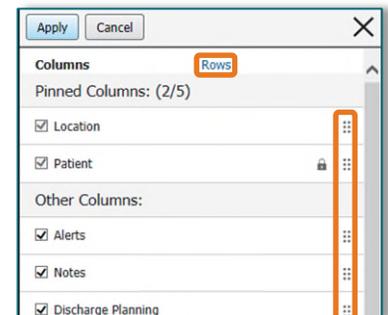
STEP 3: Select **Rows** to change the Row Height on the worklist.

Establishing Relationships with Patients

➢ Select the **Establish Relationships** button.

➢ Select the appropriate relationship from the dropdown menu.

➢ Use the **Select All** button to establish a relationship with all the patients on the list.

➢ Click **Submit**. Patient data now displays in the Acute Case Management Worklist.
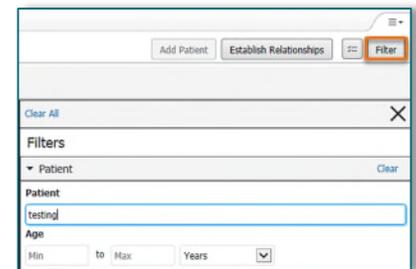
Select Rows Button

➢ To display the row selection toolbar, click the **Select Rows** button. Select patients to be added to a different patient list or remove them from the list in view.
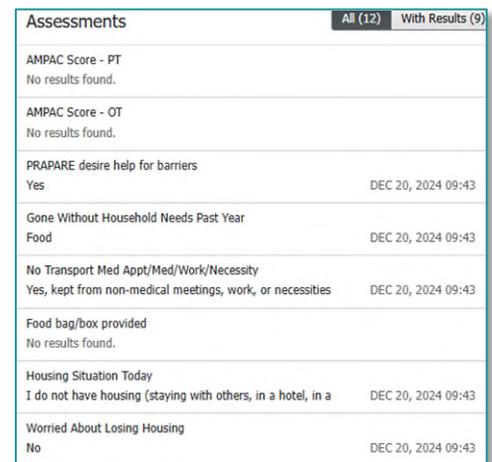
Filter Button

Select the **Filter** button to search for a patient on the list. The list filters as letters are entered into the search field.

Worklist Columns

Select a column to populate the details pane to display more information.

➢ **Patient**: Displays Name, Age, Sex, DOB, MRN, and FIN.

➢ **Location**: Displays the patient's unit and room number.

➢ **Tasks:** Displays Care Management tasks sent through an order or request. Ex. SDOH Review.

➢ **Assessments:** Displays SDOH prepare assessment and AMPAC Scores for PT and OT.

➢ **Alerts**: Displays the following alerts:

- Fax Failure Occurred.
- Actual LOS > Expected LOS.
- LOS Has Passed the Auth Date.
- Patient Readmitted.
- Unassigned Patient with Discharge Order.
- Concurrent Denial Documented.
- Multiple Working Groups Exist.
- Secondary Review Pending Outcome.
- LOS Has Passed the PDD (Planned Discharge Date) Date.

➢ **Notes**: Displays existing case management notes associated with the patient and enables case managers to add notes in the detail pane.

- Notes can be flagged as **Important** and/or **Persist Across Encounters** by selecting the box next to the option. Once saved, the note can be modified or removed from the details pane.
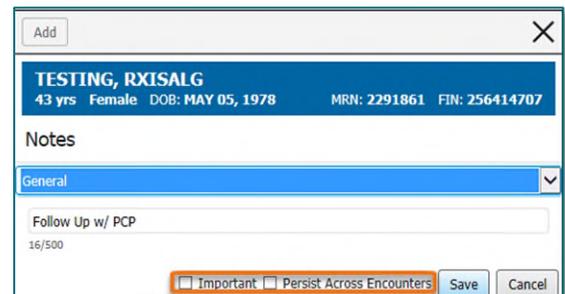
➢ **Note Types Available**: Discharge Planning, Documentation Review, General, and Utilization Review.

➢ **Discharge Planning**: Displays the following information:

- Discharge plan status.

- Date and time of the next assessment.

- Most recent update from naviHealth.

- Level of care details (additional referral information is displayed in the detail pane).
  - Select **View Full Referrals Details** to navigate to the UM Summary MPage.
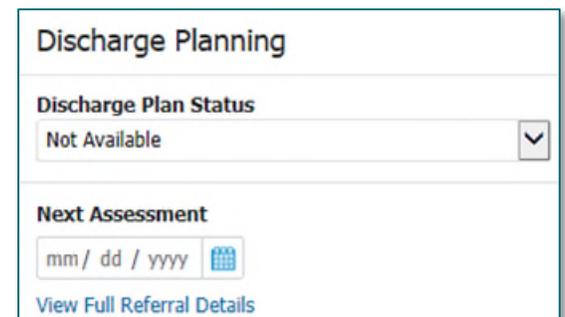
➢ **Documentation Review**: Displays the following information:

- Documentation review status.

- Date and time of the next review.

- Date and time of the most recent updated (clarification information is displayed in the detail pane).
  - Select **View Full Documentation Review** to navigate to the Discharge Planning MPage.
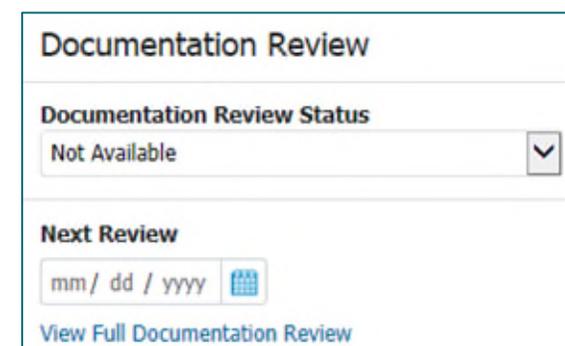
➢ **Group**: Displays the working DRG and final DRG associated with the patient.

➢ **Length of Stay**: Displays a color-coded progress indicator with key end dates and a table containing the following information:

- Actual length of stay (LOS).

- Authorization end date (Auth End).

- Expected length of stay (ELOS).

- Planned discharge date (PDD).

- ➢ **Payer**: Displays the payer, health plan, and financial class associated with the patient encounter.

- ➢ **Utilization Review**: Displays the following information:

  - Utilization management status.

  - Date and time of the next review.

  - Date and time of the most recent review (additional information from the review source, such as InterQual, or a manual updated, is displayed in the detail pane).

- ➢ **Readmission Risk Score**: Displays the patient's Readmission Risk score.

- ➢ **Care Team**: Displays care team members associated with the patient.

- ➢ **Consult Orders**: Displays patient consult orders.

- ➢ **Discharge**: Displays the date and time the Discharge (DX) order was placed on the patient.

- ➢ **Forms**: Displays Discharge Planning Initial Assessment, Discharge Planning Ongoing Assessment, and Discharge Planning Ongoing Assessment BH. Click **Create** to document in a new form.

- ➢ **Visit**: Displays the visit type (inpatient, emergency, observation, etc.), LOS, and Admit Date (ADM DT).