Northern Light Health

From the Office of Clinical Informatics

Documentation Specialist Workflow

February 15, 2019

Documentation Specialists will be using the Documentation Review worklist and the UM Summary MPages to identify patients and update the Working Group (DRG) that has been entered by the UM (Utilization Management Nurse).

Documentation Review Worklist

The Documentation Review Worklist will open when the Documentation Specialist signs into PowerChart. The patient list that has been used previously can be selected in the Documentation Review Worklist to ensure that the correct nursing unit(s) are being used to identify patients for the worklist.

Worklist Filters

- **Filters are used to pull in the correct patients to the worklist.**
  - **Encounter Type**, **FIN Class**, and **Payer** do not need to be touched unless the Care Manager is only working with a specific Payer or insurance type.
  - **Next Document Review**
    - From the drop-down, select the time frame in which the next document review is due for the patient to display.
    - **All Future Document Reviews** is the recommended filter to select.
    - If the Documentation Specialist only wants to see those patients who are due to have a Documentation Review done today, **Up to Today** would be selected.
  - **Relationship** – from the drop-down select the desired relationship status to pull in.
    - **All** – patients who do not have a relationship with a Documentation Specialist, have a relationship with other Documentation Specialists, and patients that you have a relationship with will display on the list.
    - **All** is the recommended filter.
  - **Include patients with:**
    - **Completed Documentation Reviews** – check this box if patients who have a completed documentation review should stay on the worklist. If unchecked, the patient will fall off the list when the documentation review is marked as complete.
    - **No Next Assessment** – check this box so that patients who do not have a documentation review date documented will appear on the worklist.
- **Sorting**
  - Sorting is an individual workflow decision by Documentation Specialists.
    - **Primary** – from the drop-down select how the list should be sorted.
      - It may be helpful to sort by **Next Documentation Review.**

- **Secondary** – after the list is sorted by the primary selection, the list will sort by the secondary selection.
    - If several nursing units are being covered, sorting by **Nurse/Unit/Room/Bed** may be helpful.

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

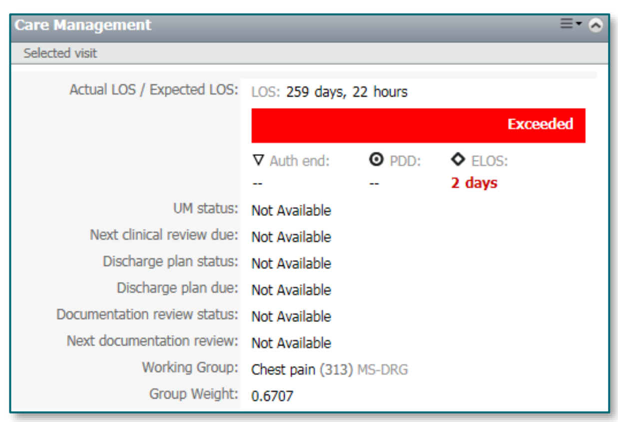
- Click the wrench and green brush icon to modify **Patient lists**.

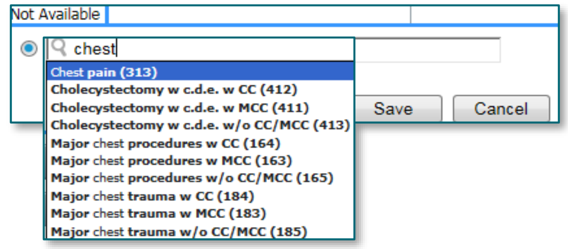
Hover Functionality

- **Patient name** – reveals the MRN and DOB.
- **Red triangle** – reveals 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.
- **Group (DRG) number** – reveals the name for the DRG.
- **Next Document Review column** – shows the date of the last review. Click the notepad that appears in the upper-right corner and the chart will open the **UM Summary MPage**.
- **Insurance** – reveals more information about the insurance.

Documenting the Working Group (DRG)

- The **UM (Utilization Management) Nurse** enters the DRG in the **Care Management** component located on the UM Summary MPage.
- **CDI** nurses will complete a chart review and update the DRG as needed.
- The DRG is entered in **Working Group**.

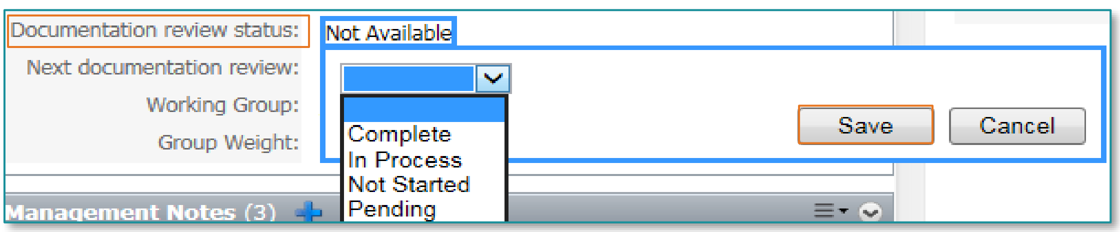




- If no DRG has been entered, **Not Available** will display.
- Click **Not Available.**
- Start typing in the **Search** box and select the appropriate DRG for the patient.
- Click **Save.**

➢ Update the **Documentation review status** in the **Care Management component.**

- Click **Not Available** if a status has not been previously documented.
- Click the **status** to update if a Documentation Review status needs to be changed.



- Click **Save.**
- The **Documentation Review Status** will update on the **Documentation Specialist Worklist**.

➢ Update the **Documentation Review date.**

- Click **Not Available** if a date has not been previously documented.
- Use the **calendar** to select the date in which the next review is to take place.
- Click **Save.**
- The **Documentation Review Date** will update on the **Documentation Specialist Worklist**.