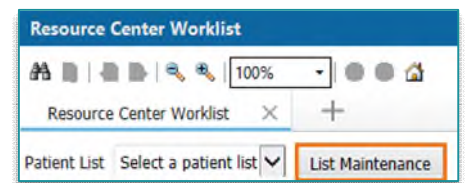


The Resource Center Worklist reduces the need for Resource Center Staff to toggle between multiple worklists. Key patient information is consolidated into one worklist, improving efficiency.

## First Time Set Up

When accessing the **Resource Center Worklist** for the first time, resource center staff will select **List Maintenance** to select a patient list to display in the worklist.

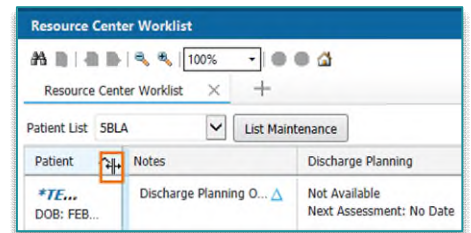
- Using the **Patient List** dropdown, select the desired list from previously established patients lists.
  - To add a new patient list or remove an existing list, select **List Maintenance**.



## Configuring the Columns

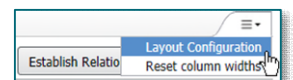
**STEP 1:** To adjust column width, hover between columns to display the column editor. Click and drag column to desired size.

- To reset column widths, select **Reset column widths** in the page menu on the top right of the worklist.



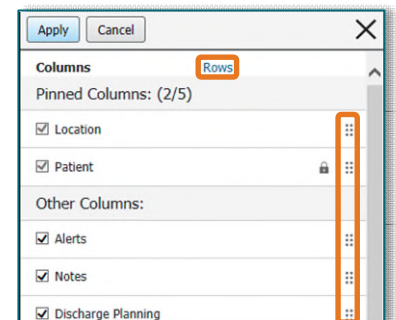
**STEP 2:** Users can modify the column order and remove columns. Navigate to the page menu and select **Layout Configuration**.

- 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 into view at any time.
  - The **Patient** column is locked in place and cannot be removed.

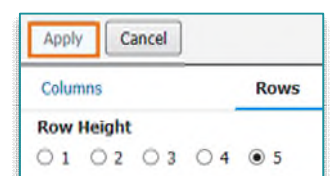


**STEP 3:** Select **Rows** to change the Row Height on the worklist.

- Once desired height is selected, select **Apply** to display changes.

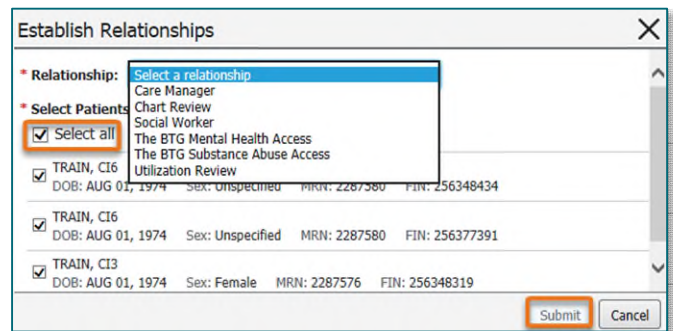


**NOTE:** A maximum of five comments will display face up on the worklist depending on row height selection.



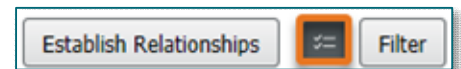
## Establishing Relationships with Patients

- 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 **Resource Center Worklist**.



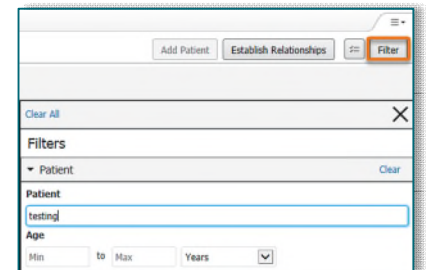
## Select Rows Button

- 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 view the list in view.



## Filter Button

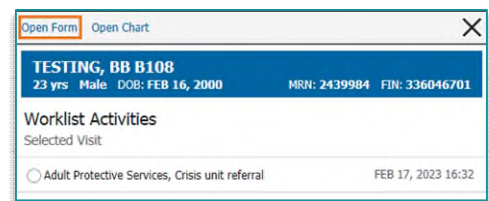
Select the **Filter** button to search for a patient on the list. The list will filter as letters are entered into the search field.



## Worklist Columns

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

- **Patient:** Displays Name, Age, Sex, DOB, MRN, and FIN.
- **Comments:** free text information used by the resource center staff to communicate information to themselves or one another within the department.
  - **Edit** and **Delete** are available for personal comments.
  - **Delete** is available for other team member comments.
- **Worklist Activities:** This displays the worklist activities selected on the **Resource Center Consult Activity Form**.
  - The **Resource Center Consult Activity Form** is accessed from the details window by selecting the **Open Form** hyperlink.
  - All updates show in the details window with the date and time.



➤ **Notes:** Displays existing case management documentation:  
**Discharge Planning Initial and Ongoing Assessment** forms.

➤ **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 **Discharge Planning** MPage.

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

- To display the **Care Managers**, select **Display Physician** face up on the worklist.

➤ **Consult Orders:** Displays **Inp Resource Center Consult** orders.

➤ **Forms:** **Resource Center Consult Activity Form** populates here.

- Click **Create** to document in a new form.

A screenshot of a patient notes form. At the top, it says "Add" and "TESTING, RXISALG" with patient details: "43 yrs Female DOB: MAY 05, 1978 MRN: 2291861 FIN: 256414707". Below this is a "Notes" section with a "General" dropdown menu. The text "Follow Up w/ PCP" is visible, along with "16/500". At the bottom, there are checkboxes for "Important" and "Persist Across Encounters", and "Save" and "Cancel" buttons.

A screenshot of the "Discharge Planning" form. It has a "Discharge Plan Status" dropdown menu currently set to "Not Available". Below that is a "Next Assessment" section with a date input field "mm / dd / yyyy" and a calendar icon. At the bottom, there is a link that says "View Full Referral Details".

A screenshot of the "Care Team" form. It has a "Display Physician" button highlighted with an orange box. Below this, it shows "TESTING, BB B108" with patient details: "23 yrs Male DOB: FEB 16, 2000 MRN: 2439984 FIN: 336046701".

A screenshot of a dropdown menu. The "Create" button is selected, showing a list of options: "Resource Center Consult Activity Form" and "Resource Center Consult Reasons Test". There is also an "Open Form Browser" button next to it.