Northern Light Health

From the Office of Clinical Informatics

Quick Reference Guide (QRG)
UM/Discharge Planning Worklist

December 16, 2020

This Quick Reference Guide (QRG) reviews completing the UM/Discharge Planning Worklist. The UM and Discharge Planning Worklists are very similar and share the same functionality.

Common Buttons & Icons

UM Worklist	
	Filter icon
	Alert icon
	Notes icon
	Notes Edit icon
	Notes Delete icon
	Documentation icon
	Calendar icon

Create A UM/Discharge Planning Worklist

➢ **From the UM Worklist:**

STEP 1: Click the **List Maintenance** hyperlink.

STEP 2: Use the **Wrench** to create a patient list, if needed.

STEP 3: Click the tab for the patient list you need.

NOTE: **You need to have a patient list created before you can create a UM/Discharge Planning list. Refer to your organization's policies and procedures on assigning patients to multiple caregivers.**

STEP 4: Right-**click the patient you need** .

STEP 5: Click the **Add** to a Patient List right arrow.

STEP 6: Click the list you want to move the patient to.

STEP 7: Review the list to make sure the patient was moved.

Use the Patient List with UM Worklist

➢ **From the Patient List:**

STEP 1: Click **UM Worklist** in the toolbar.

STEP 2: Click the **Patient list** drop-down arrow.

STEP 3: Click the needed list.

STEP 4: Click the **Filter** icon.

STEP 5: Set the Filter options as appropriate.

STEP 6: Click **Save configuration as default** to keep the filter selections.

STEP 7: Apply the filters.

NOTE: **Best practice is to leave the Encounter type, FIN class, and Payer information the same as they default in. It is also recommended to select the All future clinical reviews option for the section titled Next clinical review and to select the No next clinical review option for the Include patients with section.**

STEP 8: Click the Location expand arrow icon as needed to review. Click again to collapse.

STEP 9: Hover over the Alert icon to see information.

Use the Patient List with Discharge Planning Worklist

- **From the Patient List:**

STEP 1: Click **Discharge Planning Worklist** in the toolbar.

STEP 2: Click the **Patient list** drop-down arrow.

STEP 3: Click the needed list.

STEP 4: Click the **Filter** icon.

STEP 5: Set the Filter Settings as appropriate.

STEP 6: Click **Save configuration as default** to keep the filter selections.

NOTE: **Best practice is to leave the Encounter type, FIN class, and Payer information as they default in. Then use the Next Assessment filter set to All future assessments. It is also recommended to check the remaining filter check boxes.**

Interacting with Notes within the UM/Discharge Planning Lists

- **From either the UM or Discharge Planning List:**

STEP 1: Hover over the Notes icon to see information quickly.

NOTE: **Only the two most recent notes will display. To see additional notes click the blue hyperlink telling how many notes there are.**

STEP 2: Click the blue hyperlink in the bottom right corner of the note field to review additional notes if they are available.

STEP 3: Click the **Pencil** icon in the Note field to edit the note.

STEP 4: Click the **Delete** icon in the Note field to delete the note.

STEP 5: Add a note by clicking the Add Note hyperlink.

NOTE: **If no Note icon is visible, hover your mouse over the blank space where it would display if notes were documented. This is next to the patient age/gender in the patient column. Once it's visible, click the Add Note hyperlink.**

Document UM Status

- **From the UM Worklist:**

STEP 1: Click the **UM Status** just below a patient's age and gender in the Patient Name column.

STEP 2: Click the appropriate status.

STEP 3: Click **Save**.

Assign a Care Manager

- **From the UM Worklist:**

STEP 1: Click the listed Care Manager below the US Status in the Patient Name column.

STEP 2: Click the **Search** field.

STEP 3: Begin to type the Care Manager name and a list will populate.

STEP 4: Click the appropriate Care Manager name.

STEP 5: Click **Save**.

Document Next Clinical Review Date

- **From the UM Worklist:**

STEP 1: Click **No Date** within the correct patient's Next Clinical Review (Last Review) column.

STEP 2: Click the **Calendar** icon.

STEP 3: Use the right and left arrows to alter the month and year to set the correct option.

STEP 4: Click the correct day needed.

STEP 5: Click the time field and alter as needed.

STEP 6: Click **Save**.

NOTE: **Click the Documentation icon to navigate to the associated PowerForm to capture or review additional information as needed.**