Northern Light Health

From the Office of Clinical Informatics

Quick Reference Guide (QRG) Complete the Discharge Planning Workflow

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This Quick Reference Guide (QRG) reviews completing the Discharge Planning workflow.

Common Buttons & Icons

	Customization Menu icon
	Component down arrow
	Component Add icon
	Insurance Authorization Expand icon
	Exit icon
Tear Off	**Tear off** icon
	Home icon
	naviHealth Internal Notes icon
	Component Expand icon

Edit the MPage View

➢ From the Care Manager View within the patient's chart:

STEP 1: Click the **MPage Add View + icon** to the left of the MPage tabs.

STEP 2: Select the appropriate view to add a view.

STEP 3: Click the X icon for the MPage view you want to delete.

STEP 4: Click and drag the MPage tab to rearrange the list of MPages.

Review IPASS Notes

➢ From the Care Manager View Discharge Planning MPage:

STEP 1: Click the patient's name in the Worklist.

STEP 2: Click **No Severity** on the patient's Discharge Planning MPage.

STEP 3: Review the IPASS notes as appropriate.

STEP 4: Click **No Severity** again to close the window.

Rearrange the Component List

➢ From the Care Manager View Discharge Planning MPage:

STEP 1: Click the **Customization Menu** icon.

STEP 2: Click **Drop and Drag**.

STEP 3: Click the header of the component you want to move.

STEP 4: Drag it to the new position within the component list.

STEP 5: Click **Drop and Drag** again in the Customization menu once complete to turn off the feature.

Collapse/Expand Components

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Click the **Customization Menu** icon.

STEP 2: Click **Expand All** to expand all components at one time.

STEP 3: Click **Collapse All** to collapse all components at one time.

Set Components View

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Click the **Customization Menu** icon.

STEP 2: Click the **Components** right arrow.

STEP 3: Click the component with the check mark to hide it.

STEP 4: Click the component without the check mark to make it visible.

Navigate to Discharge Planning Forms

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Click the **Discharge Planning** component blue down arrow icon.

STEP 2: Click the form you need to navigate to.

NOTE: **Alternatively, if what you need is not listed you can click AdHoc in the toolbar.**

- Click the check box of the form you need to select it.
- Continue selecting forms as needed.
- Click Chart when all are selected.

Add Care Management Notes

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Click the **Care Management Note** header blue + icon.

STEP 2: Click the **Type** drop-down arrow.

STEP 3: Click the appropriate note type.

STEP 4: Click the **Note** field.

STEP 5: Type your free text note.

STEP 6: Click the optional check boxes as appropriate.

STEP 7: Click **Save**.

Enter Insurance Authorization

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Click the **Insurance Information** component down arrow.

STEP 2: Click the **Insurance Authorization Expand** icon.

STEP 3: Click the **Auth Number** field.

STEP 4: Type in the Auth Number.

STEP 5: Click **Save**.

STEP 6: Click the space next to Auth Dates.

STEP 7: Click the **Start Date** field.

STEP 8: Type in the Start Date information.

NOTE: Alternatively, you can click the Calendar icon to choose the Start Date information.

STEP 9: Click the **End Date** field.

STEP 10: Type the End Date information.

NOTE: Alternatively, you can click the Calendar icon to choose the End Date information.

STEP 11: Click **Save**.

STEP 12: Click the space next to the additional information if you need to enter a Fax, Phone, or Comment.

Document PM Conversation Comment

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Click the small down arrow on the right of the Insurance Information component header.

STEP 2: Click **PM Conversation**.

NOTE: Alternatively, you can click PM Conversation in the toolbar and use the Discharge Encounter or cancel Discharge options.

STEP 3: Click the **Comments** tab.

STEP 4: Click the **Enhanced General Comment** ellipses.

STEP 5: Click the **Comment** field.

STEP 6: Free text your comment.

STEP 7: Click **OK** to close the Comment window.

STEP 8: Click OK.

Navigate to Attached Documents

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Click the **Documents** component down arrow.

STEP 2: Click the hyperlink for the document you need to review.

STEP 3: Click the **Exit** icon once you are done reviewing the document.

Review Vital Signs

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Click the **Vital Signs** component down arrow.

NOTE: **The most recent information displays.**

STEP 2: Click the blue hyperlink for individual vital signs to navigate to more detailed information.

STEP 3: Click the blue down arrow icon to open additional links.

Using the Tear Off View for Documentation

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Click the **Tear Off** icon in the toolbar.

STEP 2: Use the View Only window of the patient chart to help with documentation.

STEP 3: Click the **X Close** button to close the window.

NOTE: **Click the Home icon if you don’t return to where you started.**

Add Orders

- **From the Care Manager View Discharge Planning MPage:**

STEP 1: Hover over the Menu tab on the left-side of the window if the Menu is closed.

STEP 2: Click the **Orders +** icon.

STEP 3: Use the Add Order window to add the needed order.