Northern Light Health

From the Office of Clinical Informatics

# Quick Reference Guide (QRG)
# Using the Readmission Worklist

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## This Quick Reference Guide (QRG) reviews the workflow for using the Readmission Worklist

## Common Buttons & Icons

| | |
|---|---|
| Readmission Worklist | **Readmission Worklist** button |
| / | **Menu** icon |
| | **Filters** icon |
| | **X Remove** icon |
| | **Add Patient** icon |
| 1 minutes ago | **Refresh** icon |
| X | **X Close** button |
| | **Sign** icon |

## Review the Dashboard and Worklist

➢ From the patient's chart:

STEP 1: Click Readmission Worklist.

- To change the information that displays in a widget, click the drop-down arrow; then click the appropriate option.
- To access table view, click the Menu icon in the widget; then click Table View.
- To navigate between the Dashboard and Worklist, click the Dashboard drop-down arrow; then click Worklist.

## Set Up a Worklist

➢ From the Readmission Worklist, Dashboard:

STEP 1: Click the **Filters** icon.

STEP 2: Enter the list name in the **Select or Create a saved list** field.

STEP 3: Click **Facility** in the Primary tab.

STEP 4: Click the appropriate location.

STEP 5: Click **Building**.

STEP 6: Click **Inpatient** or **Outpatient**, as appropriate.

STEP 7: Click **Units**.

**NOTE: If you do not select a specific unit, all units will be included in your list.**

STEP 8: Select the check box(es) for the appropriate units.

- If you want to select a specific service for your list, use the Medical Service section.
- To include only patients from a specific patient list on your Readmission Worklist, click Patient List; then click the desired list.

STEP 9: Click the **Secondary** tab.

STEP 10: Click **Encounter Status**.

STEP 11: Select the appropriate check box(es) depending on the type of Worklist.

- If you included discharged patients in your list, click Discharge Disposition and make the appropriate selections for follow up.
- Use the remaining sections to narrow down the list as much as you desire.

STEP 12: Click the **Dashboard Selections** tab.

**NOTE: This tab defaults to bring in all the patients based on the sections. If you wish to view only a certain subset of patients, use one of the filters.**

STEP 13: Select the **Set as Default** check box to make this list the default list, if desired.

STEP 14: Click **Save List**.

STEP 15: Click **Set Filters**.

- To select a list, click the Current List drop-down arrow.

## Remove a Patient from a List

➢ **From the Readmission Worklist, Dashboard:**

STEP 1: Click the **Dashboard** drop-down arrow.

STEP 2: Click **Worklist**. The Worklist screen displays.

- To sort the list by different criteria, click the drop-down arrow at the top of the list.

STEP 3: Hover over the cell for the patient you wish to remove.

STEP 4: Click the **X Remove** icon. The Remove Patient window displays.

STEP 5: Click the appropriate reason for removal.

STEP 6: Click **Remove**.

**NOTE: If you remove a patient from a list, it removes it for all users of that list.**

## Add a Patient to a List

- **From the Readmission Worklist, Worklist:**

STEP 1: Click the **Add Patient** icon. The Add Patient window opens.

STEP 2: Click **Search**.

STEP 3: Enter the criteria into the appropriate fields.

STEP 4: Click **Search**.

STEP 5: Click the appropriate patient.

STEP 6: Click **OK**.

STEP 7: Click the appropriate reason to add the patient.

STEP 8: Click **Add**.

STEP 9: Click the **Refresh** icon. You return to the Dashboard.

- To open the patient's chart:
  - Click the **Dashboard** drop-down arrow.
  - Click **Worklist**.
  - Click the patient.
  - Click the **Open Chart** drop-down arrow.
  - Click the desired section of the patient's chart.

## Complete the Readmission Worklist

- **From the Readmission Worklist, Worklist:**

STEP 1: Click the appropriate patient.

STEP 2: Review the **Overview** tab.

STEP 3: Click the **Readmission Risk** tab.

STEP 4: Review the information, as needed.

STEP 5: Click the **Support Services** tab.

STEP 6: Review the information, as needed.

- To review a consult order, click the consult in the Support Services Consults table. Once finished, click Done.
- To review a note, click the note in the Support Services Consult Documentation section. Once finished, click the X Close button.

STEP 7: Click the **Documentation** tab.

STEP 8: Click **Discharge Planning Initial Assessment**.

STEP 9: Document the form, as appropriate.

STEP 10: Click the **Sign** icon. You return to the Documentation tab of the Worklist.

STEP 11: Click the **Menu** icon.

STEP 12: Click **Refresh**.

STEP 13: Click the **Transition Readiness** tab.

STEP 14: Click **Discharge Planning Ongoing Assessment**.

STEP 15: Document the form, as appropriate.

STEP 16: Click the **Sign** icon.

STEP 17: Click the **Follow Up** tab.

- To add an appointment, click Appointment Component in the Appointment Component section.

STEP 18: Click **CM Care Coordination Form** in the Follow Up Phone Call section.

STEP 19: Document the fields, as appropriate.

STEP 20: Click the **Sign** icon.

STEP 21: Click the **Menu** icon.

STEP 22: Click **Refresh**.

- To return to the Dashboard, click the Worklist drop-down arrow; then click Dashboard.