Introduction to Hyperspace

1. Login using your **Case Management User ID** and **Password**.

2. Click **Remind Me Later**, then click **OK** for the **Patient Lists** alert.

Creating Patient Lists

The Patient List activity is your default activity and helps you manage your patients after they are assigned to you. There are two kinds of lists: My List and Available Lists.

1. Right-click on the **ASP Nursing** list and select **Properties**.

2. Change the **Name** to "**My Patient List**".

3. Click **Copy** and double-click on the **ASP CARE COORDINATOR MYLIST TEMPLATE**.

4. Single-click on the **Patient** column and click the **up arrow** once.

5. Type "**Patient Name"** in the **Column to sort by field** and press **Enter**.

6. Click **Accept**.

7. Under **Available Lists**, open **System Lists** > **All My Patients**.

8. Right-click on **All My Patients** (with 3-person icon) and send to **My List** you just created.

9. Click **Edit List** and select **Create My List**.

10. For training, name your list "**My Departments**".

11. For training purposes, click **Copy** and scroll through the list and locate the **ASP UTILIZATION REVIEW MYLIST TEMPLATE**.

12. Double-click on the list.

13. Click on the **Patient** column and click the up arrow one time.

14. In the **Column to sort by** field, type "**patient**" and press **Enter**.

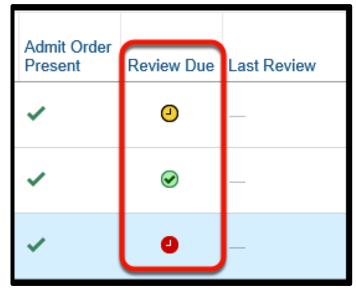
15. Select "**Patient Name**"

16. Click **Accept**.

17. Under **Available Lists**, click **System Lists** and open the **All My Patients** folder.

18. Right-click on **Treatment Team** and **Send To** > **My Patients** List.

19. Collapse the System List folder and click on the **Wausau Hospital** folder.



20. Click **All Nursing Units**.

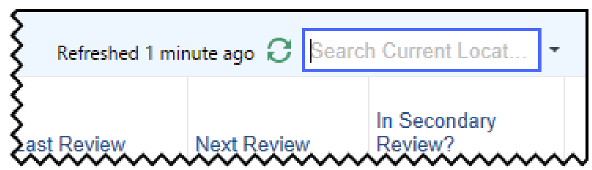
21. Right-click on the **Med/Surg Intermed Care** unit > **Send To** > **My Departments**.

22. Locate the **Review Date** column.

Finding Patients

Scenario: Now that we have created personal my lists, we can locate our patient and add them to our list. We will be searching for our Frank patient today.

1. In the **Search Current Location** field, type the first 3 letters of your **Frank** patient's "**first name last name**".



2. Right-click on your Frank patient's name click **Assign Me**.

3. In the **Relationship** field, type **Care Manager** and click **Accept**.

4. Click on your **My Patients List** to see your Frank patient.

5. Notice that the columns we selected for this list include the **Payor(s)** column.

6. Single click on your **Frank** patient.

7. If closed, click on the arrow at the bottom of the screen and open the **Report Pane**.
    - Hint: You can increase the size of the report pane by hovering your mouse over the top line and move up or down.

8. Scroll through the report to see the types of information that is available.

9. Click the **wrench** icon and select **Add or remove buttons from toolbar.**

10. In the first empty row, click on the magnifying glass and search for the **IP Utilization Review Patient List** report.

11. Click the up arrow until this report displays under **Discharge Planning**.

12. Add the **CM Profile** and **CCSC Conversation** reports.

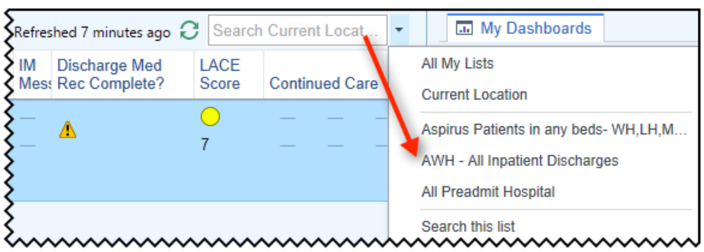
13. Click **Accept.**

14. Open the **CM Profile** report.

The **CM Profile** report will show how many days the patient has been admitted. The CCSC Conversations report shows information regarding Home Medical Care, Durable Medical Equipment and Community Resources.

15. Locate the search field where we looked up our **Frank** patient.
    - You can change what you are searching for using the arrow.

16. Click the arrow on the right and select **All - AWH Inpatient Discharges**.
    - Search here for patients if they were discharged on or before 4 days ago.
    - If the patient has been discharged longer than that, you will need to search for your patient in **Patient Station** look up in the Epic Tool Bar.



Patient Chart

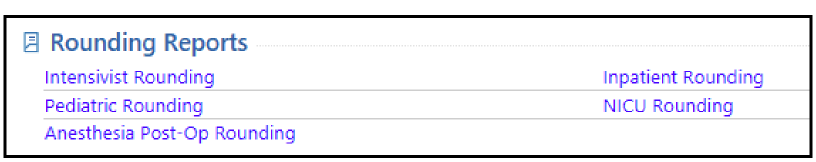
Scenario: Frank is a 31-year-old who was admitted 2 days ago for pneumonia. We will take a quick overview of the patient chart workspace then we will look at tools designed specifically for your workflows.

1. Open **Frank's** chart and click "**Let's Go!**"

2. Locate the **Overview Report** in the **Summary** activity and scroll through the report to find patient information such as Vitals, Problems, and Treatment Team.

3. Open the **Index Clinician** report and locate the **Rounding Reports** section.

4. Click on the **Inpatient Rounding** report hyperlink.
    - This report will show Notes, Treatment Team and Vitals. There are also links to other reports.



5. Click the blue arrow under **Summary** to return to the **Index Clinician** report.

6. Open the sidebar (if closed) by clicking on the arrow in the small blue rectangle box.

7. Click on the **More** button to see additional reports.
    - Two reports that will be used by Utilization Review are **Beds Days** and the **UR** report.

8. Open the **Chart Review** activity and click on the **Notes/Trans** tab.

9. Click the **HP** filter.

10. Click on the note to view the details on the right of the screen.

11. Open the **Notes** activity.
    - This activity will only show notes written during this admission.
    - You can also filter notes by clicking on tabs such as Consults, H&P, and D/C Summary.

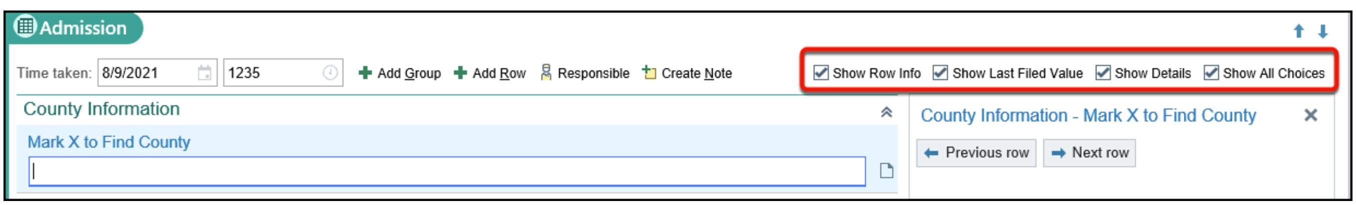
Case Management Navigator

The Case Manager Navigator is the best place for you to complete your charting. Navigators are designed to guide you through a specific workflow. This enables you to cover all the items you need to review and document for your patients.

1. Click to open the **Case Management** navigator.

2. Click **Admission**.

3. Check the 4 boxes at the top of the navigator.



Show Row Info	Shows the definitions for the row.
Show Last Filed Value	Shows what and what the list filed information for each row.
Show Details	Displays a sidebar that shows the current row.
Show All Choices	Shows all choices within that row. If you keep the All Choices button off, you will need to "Hover to Discover" to see your selections for that row.

4. For now, let's uncheck the **Show Details** box.

5. Type "**X**" in the **Mark X to Find Country** and press **Enter**.
   - The patient's County of Residence displays.

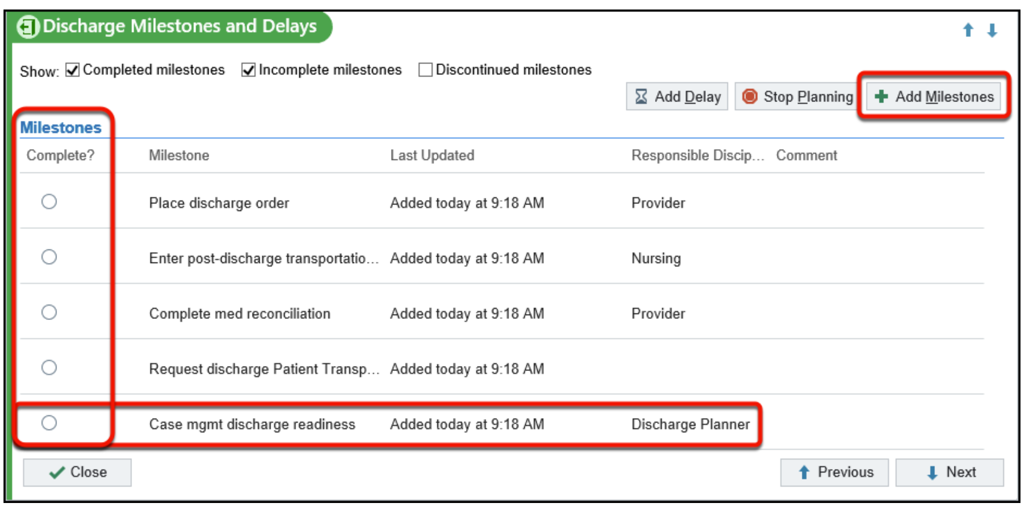
6. Open the **Discharge Planning** section and click **Yes** for **Does the patient need discharge transport arranged**?
   - When clicking yes, more rows cascade in this section for detailed documentation.

7. Click **No** for **Has discharge transport been arranged**?
   - When the date and time is known, you can complete this section.

8. Open the **Expected Discharge** section.
   - This helps discharge planners know when beds will be available.
   - It also shows if a discharge order has been written.
   - When this information is completed by the nurse or the provider, it will flow to the Case Management navigator.
9. Open the **D/C Location & Destination** section and click **SNF.**

10. Open the **Discharge Milestones** section and click **Start Planning**.

It is very important to assign yourself to the patient or you will not see your **Case management discharge readiness** milestone. If you have assigned yourself and you are not seeing Case management discharge readiness milestone, you can add it by clicking on the **+ Add Milestone button**.



11. Click on **Destination** in the navigator.

12. In the **Search for service provider** window, type "**wau man**" and press Enter.

13. Click on the star to make it a favorite.

14. Type "**col man**" in the search field and press **Enter**.

15. Make the **Colonial Manor** a favorite by clicking the star.

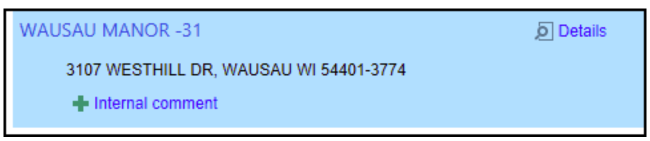
16. Search for **Benedictine Living Community** and make it a favorite.

17. Click **Accept**.

18. Clear the search field and single-click on **Wausau Manor** and **Benedictine Living Communi**ty.
    - These two destinations will display on the right.
    - You can also use Favorites to located most often used destination.

19. Click **Accept** to close the window.

20. Click on the **+ Internal comment** for the **Wausau Manor** facility.



21. Type in **".cc1"**and press **Enter**.

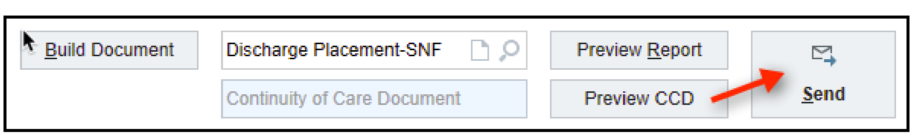
22. Click **Accept**.

23. In the **Report to send** field click on the magnifying glass and double-click the **Discharge Placement-SNF**.

24. Click **Preview Report**.

25. Click the **X** to close the report and click the **In Basket** button for **Wausau Manor**.

26. Then click the **Send** button in the upper right.



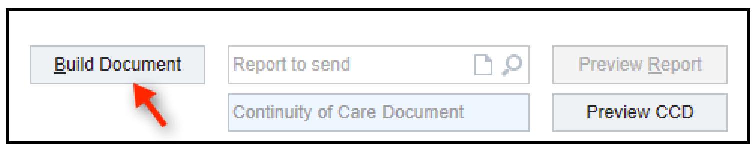
27. For this exercise, change the **Request status** to **Accepted.**

28. In the **Selected Service Provider for Skilled Nursing**? row Click **Yes**. (Default is No)
29. Click on the **Chevon** to close that section.

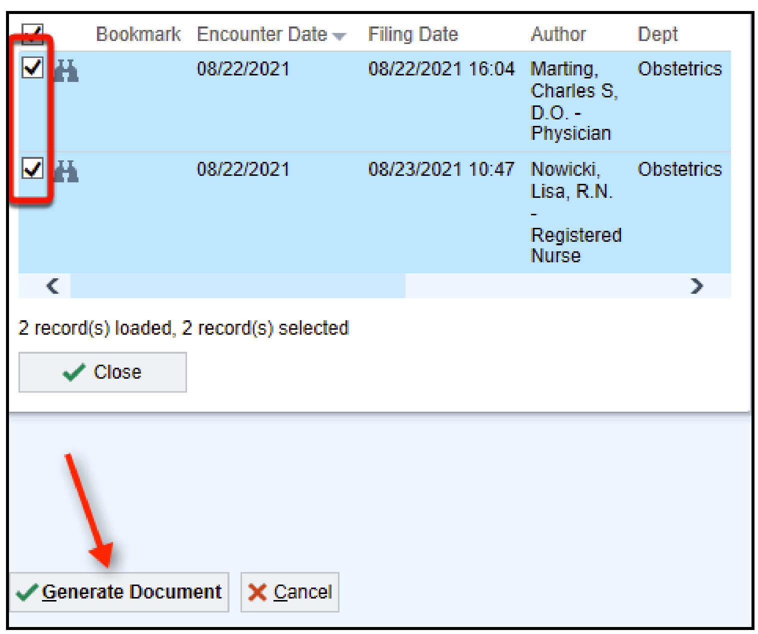
30. Click on the other post-discharge facility and update the **Request status** to **Declined**.
31. Select any **Decline reason** and collapse the facility.

Build Documents

1. Click on the **Build Document button**.



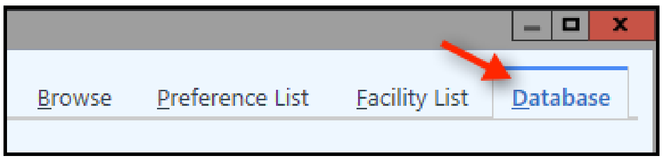
2. Click the **Notes/Trans** button.
3. Click on the **binoculars** to see the note, then click **Close**.
4. Check the box to choose both notes and click **Generate Document**.
5. Click **OK** for the document alert.



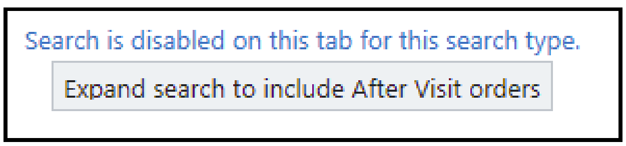
Entering DME Orders

Scenario: If the provider has not put in the DME orders, the Case Managers can place the order.

1. Open the **Orders** activity.
2. Click **Dismiss** for the **PTA Med BPA**.
3. In the **Place new order** field, type "**walker**" and press **Enter**.
4. If no matches display, click the **Database** tab.



5. If you still don't see any matches, click the **Expand search to include After Visit orders**.



6. If collapsed, expand **After Visit Procedures**.
7. Double-click on **Walker** and enter the **Walker Type** as **Walker with Wheels**.
8. **Length of Need** is **3 months** and click **Accept**.
9. Click **Sign** and associate the **Walker** with the **Pneumonia** diagnosis.
10. In the **Select a specific diagnosis** window select **aspiration pneumonia**, **unspecified** and **bilateral**.
11. Click **Accept** 2 times.
12. Select **Per Protocol-No Cosign Required** and enter **Laurence Gordon** in the **Ordering Provider** field.
13. Press **Enter** and click **Accept**.
14. Return to the **Case Management** navigator and open the **DME Coordinator** section.
15. Type "**aspirus**" in the **Search for provider service** field and press **Enter**.

16. Select **ASPIRUS KEWEENAW HOME MEDICAL EQUIPMENT** and click **Accept**.

17. In the **Report to send** field, click the magnifying glass and double-click on **Durable Medical Equipment Orders**.
    - A hard displays when you click in the search field.

18. Click **Send**.

19. Click on the facility name and locate the **Communication History**.

20. Click **Accepted** in the **Request status** row.

21. Click **Yes** for the **Selected service provider for Durable Medical Equipment**.

22. Click **Complete** for the **Durable Medical Equipment coordination complete**?

Readmission Assessment

Scenario: If the patient has been readmitted, you would complete the Readmission Assessment.

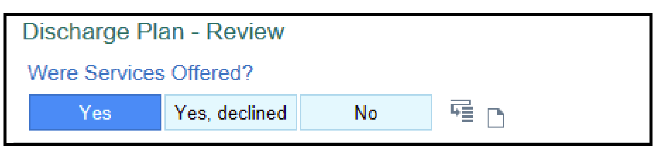
1. Open the **Readmission Assessment** section of the **Case Management** navigator and scroll through to review.
2. Click **No** for Is this a **Planned Readmission**.

3. Click No for **Is this Admission Related to last Admission**.

4. Enter any number in the **Number of Days Since Last Admission**.

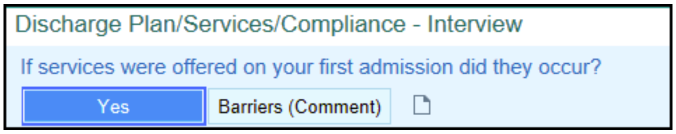
5. Make a few selections under **Resources Prior to Admission**.

6. Under the **Discharge Plan – Review** section click **Yes** for **Were Services Offered**?



7. Make a couple of your own selections.

8. Click **Yes** under **Discharge Plan/Services/Compliance – Interview**.



9. Complete this section.

Patient Instructions Section

1. Continue exploring the **Case Management** navigator by opening the **Patient Instructions** section.
2. Open the **Appointments** section**.**
3. Open the **Follow-up Providers** section.
4. Open the **Ad-Hoc Communication** section. (EUPA)
5. Click **New Communication** and click **PCP**.
6. Click **Attach Report**, select **Transitions of Care** and click **Send Now**.
7. Click **OK**.
8. Open the **Preview AVS** section.
9. Scroll through the document to see how the information we documented in the navigator displays for the patient.

There are certain steps that need to be completed before the AVS can be printed. Two of them display here. Another hard stop that keeps the AVS from printing is no Follow-Up documentation for the patient. The Print button will be grayed out until these items have been addressed.

10. Return to the **Case Management** navigator.

Utilization Review

1. Locate the **Utilization Review** section of the navigator and open the **Book View Links** under **UTILIZATION REVIEW**.
    - Hyperlinks to **CareWebQI** and **InterQual** are available in the section.

2. Click on the **CareWebQI** hyperlink.
    - This takes you to Indicia system.
    - We are not able to access this in the training environment.

3. Click the red X to close the window.

4. Open the **Utilization Review** section and click **New**.

5. Enter the following in the Review Details:
    - Use the **Tab key** to move through the form.

Criteria set	CVA	**Source**	Interqual
Criteria status	Met	**Type**	Admission
Review date	"t" for today	**Review time**	"n" for now
Outcome	Approved	**Review status**	Complete (Default)
Diagnosis	CVA *(Pick any on list)*		

6. Type "**.cmi**" in the free text field and press **Enter**.

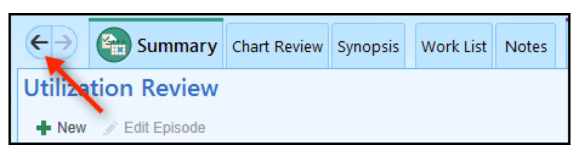
7. Press the **F2 key** to open the first SmartList.

8. "Left click to pick and right click to stick" on **Admission review**.

9. Select the **Inpatient status as both severity of illness and intensity of service criteria is met under *** criteria status.**

10. Replace the wildcard with "**admission**" and click **Accept**.

11. Click the back arrow in the upper left to return to the navigator.



Payor Communication

1. Click on the **Payor Communication** tab.
    - Note the 3 sections available in this navigator: **Payor Communications**, **Authorize/Certification** and **Bed Days**.

2. Open the **Payor Communication** section and click **Add Recipient**.

3. **Create New** in the bottom left.

4. In the **Payor** field click the magnifying glass.
    - WPS Contracted defaults.

5. Click the magnifying glass for **Benefit plan**.
    - WPS Aspirus Network displays.

6. Click **Accept**.

7. Click the magnifying glass in the **Report to send** field.

8. Double-click on the **Payor Comm Default**.

9. Click the **pencil icon** for the **Fax number** and enter any number and click **Accept**.

10. Click on the **Fax** button and click **Send**.

Auth/Cert > Bed Days

1. Click on **Bed Days** in the navigator.
2. Click the **Update bed days for this coverage** hyperlink.
3. Approved Nights In the **Start Date** field, enter the same date as the previous **End Date**.
4. For training enter **"t"** for today.
5. Type "**t+2**" in the **End Date** field.
6. Click the magnifying glass in the **Day Type** field and select **Hospital**.
7. Enter **"t+2"** in the **Next Review** date field and click **Accept**.

Approved Nights

Start Date	End Date	Day Type	Nights
8/24/2021	8/26/2021	HOSPITAL	2

Next Review: 8/26/2021

Secondary Review

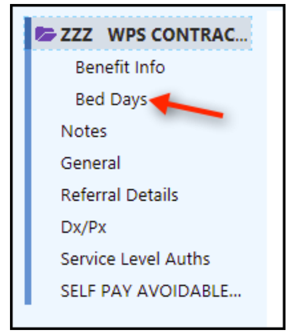
1. Click on the **Secondary Review** and click **New Reading** in the Secondary Review (UM Nurse Section).
2. Enter the following information:

Current Patient Status	Inpatient
Per Utilization Review, Patient Meets Criteria For	Observation
Current Order Status Consistent with Initial Review	Yes
Secondary Review Needed	Yes
Internal or External Review	Internal
Internal Secondary Review Request Date	"t" for today
Review Type Needed	Utilization management
Secondary Review Status	Physician advisor review complete

3. Click **Next** or Close.
4. Open the **MD Secondary Review** section and document the following:

Recommended Status	Inpatient
Secondary Review Status	Physician advisor review complete
Provider Liable	Inpatient appropriate

Deferral of Denial



1. Click the **Payor Communication** tab and open the **Auth/Cert** section.

2. Click on the **Open Auth/Cert linked to Hospital Account** hyperlink.

3. Click on **Bed Days**.

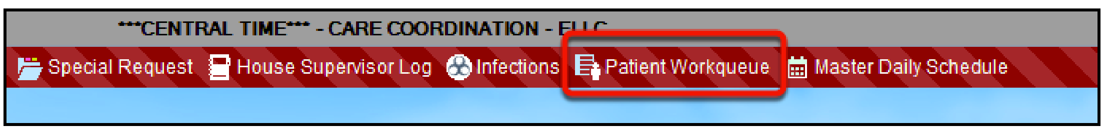
4. In the **Denied Nights**, document a start date of today. (t)

5. Enter **t+1** in the **End Date**.

6. Click the magnifying glass in the **Reason** field, select **Medical Necessity not met** and click **Accept**.

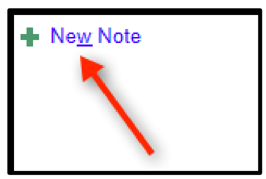
7. **Date Notified = today** and click **Accept.**

8. Click on the **Patient Workqueue** in the **Epic toolbar.**



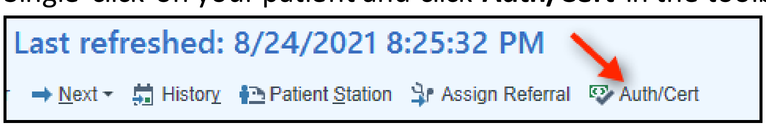
9. Double-click on the **AUTH/CERT PENDING APPEALS** folder.

10. Click on your patient and click **New Note** in the lower right.

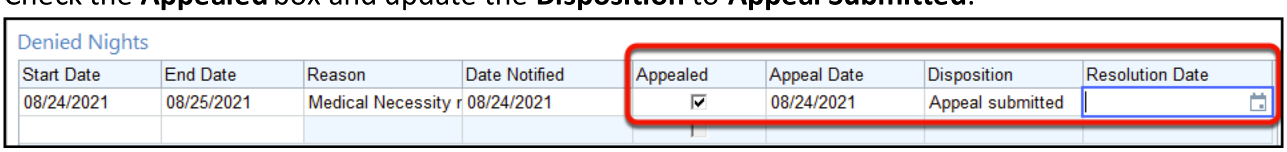


11. Type in **Appeal has been initiated** and click **Add**

12. Single-click on your patient and click **Auth/Cert** in the toolbar and click **Bed Days**.



13. Check the **Appealed** box and update the **Disposition** to **Appeal Submitted**.


Denied Nights

Start Date	End Date	Reason	Date Notified	Appealed	Appeal Date	Disposition	Resolution Date
08/24/2021	08/25/2021	Medical Necessity r	08/24/2021	☑	08/24/2021	Appeal submitted	

14. Click **Accept** and click back on the **Patient Workqueue** button (in the Epic toolbar).

15. Open the **AUTH/CERT APPEALS IN PROGRESS** folder.
    - Your Frank patient has moved to this folder.

16. Highlight your patient, click **Defer** and enter **t+3** the **Until Time** and click **Defer**.
    - The patient falls off the workqueue. *(If the patient does not fall off, click the Refresh button.)*

Document a Resolution

1. Close the **Patient Workqueues** activity located under the Epic toolbar.

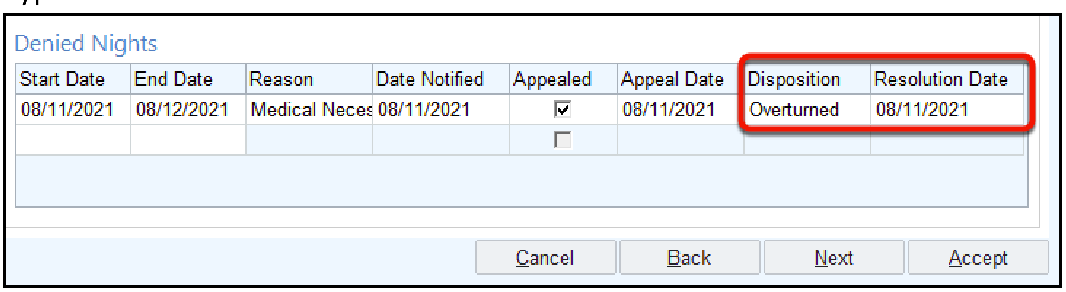
2. Click on your **Frank** patient's chart to the **Case Management** navigator.

3. If not already there, open the **Payor Communication** tab and click **Auth/Cert** in the navigator.

4. Click on the **Open Auth/Cert linked to Hospital Account** hyperlink.

5. Under **Denied Nights**, click **Bed Days** and change the **Disposition** to **Overturned**.

6. Type **"t"** in **Resolution Date**.



7. Click **Accept** and close Frank's chart.