Guided Practice: Case Manager – Case Manager Navigator

Exercise

To Complete Guided Practice outside of class:

- **Log into the Epic Ply Central Environment. (Refer to tip sheet.)**
- **Use the Login ID from the Case Manager tent card.**
- **Use the Frank patient on your tent card.**

Creating your Patient List
In this Guided Practice we will be creating 2 Patient Lists. Patient list and Department list. When working in a smaller hospital you might use one Patient list, such as a Department list.
All our patients are built at AWH. In real life you will be choosing the list from your facility.

1. Login to Epic using the using the user ID from your tent card.

2. You are now at the Patient List activity.

3. Right click on **ASP Nursing**. → Choose **Properties. → Change the name of the ASP Nursing** to anything you want your My List to be named. → Click on **Copy**. → Choose the **Care Coordination My List Template, (76938). →** Click **Accept**. → Click **Accept**. Notice your columns have changed on your My List?

4. Now you will create the Department list. Click **Edit List**. → **Create My List**. → Name the list **My Department**. Click on **Copy**. → Choose the **Care Coordination My List Template, (76938). →** Click **Accept**. → Click **Accept**.

5. Now you will find our department we are working in. Under **Available Lists**. → Click on **Wausau Hospital**. → **All Nursing Units**→ Scroll down to find & click on **Med/Surg Intermed Care. → right click. → Send to. → MY Department list.**

6. Now you will assign yourself to Frank as his Care Manager. Click on **My Department. → Scroll down to find you Frank that is listed on your tent card. OR you can search for him in the search window. Type in the first 3 letters of his last name,fra. →** Click **enter. →**

Click on **Frank** once**.** → Right **Click.** → **Assign me.** → **Relationship, type in Care.** → **click on Care Manager.** → Click **Accept.** → **Hover over the column Treatment team.** → **Do you see your username listed in the treatment team? Hurray, you just assigned yourself!** 😊

7. Now to see Frank on your Patient list. → Under **Available List,** click on **System List.** → Click on **All My patients.** → Click on **All My Patients (with the 3 people on the left side).** → **Right Click.** → **Send to.** → **Your Patient List that you named.** → Click on **Your patient list under My List.** → **You should see your Frank patient you just assigned to yourself.**

8. **Default your Patient list.** → Click on your **My List.** → Click on **Default List.** → see the * to the Left of your Patient list? This list will be the first one that open when you log into Epic.

9. Let's talk about Patient list reports. → Click on **Frank** once. **On the bottom of your screen is the report section**. If you do not see it, click on the arrow at the bottom of your screen.

10. Discharge Planning report shows you information about your patient upon discharge. We can personalize this section just for you! → Click on the **wrench** on the right side. → On Line 4, click on the **magnifying glass**. This will show you all the Reports you can wrench in. Click on **CCSC Conversation.** → **repeat the steps on line 5.** → Click on **CM Profile.** → **repeat the step for line 6.** → **Scroll down** and click on **UR Profile.** → You can move any of the reports **up or down** by clicking on the **report** and using the **up and down arrows.** → You can remove any report by clicking on the report and click the **remove button**. Click **Accept. Review each report.**

> Case Manager Navigator
> **Start at the top of your navigator and work your way down to the bottom to assure you have documented on everything you need to for your shift.**

1. **Double click** on **Frank** to go into his chart.

2. Click on the **Case Management Navigator.**

3. **Click on Admission,** this will open the admission section of the navigator.
   a. Notice the date and the time. **When you open each section of the navigator it will automatically put in the current time. If you have done your assessment earlier in your shift, change it to the correct time.**

b. **Click on each of the items listed below:**
   i. **Show Row Info: By clicking on this button it will show the description of the row.** Look at the row **Living Arrangement, see Select the patient's living arrangement.** If that was not checked**,** you would not see the description**.**
   ii. **Show Last Filed Value:** Scroll down to the Columbia Suicide Severity rating Scale. Notice Yes taken today. Hover over that section. You can see who documented taken and recorded, and the date and the time. **Scroll back up**.
   iii. **Show All Choices:** This will show you all the choice within the row.

Start at the top of the navigator and work your way down. I will help you get started.

4. Mark X to Find County. Click in the **row** and type in **x**. Notice the next questions County of Residence auto populated? What does the description of the row say?

5. Work your way down to the bottom of this section. Document on your own.
   a. This icon means it is a cascading row.  Based upon how you answer, the row might cascade.
   b. When you are done, move to the next section by clicking **Next**.

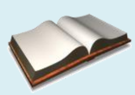
6. **Disch Planning**: This is part of the discharge Milestone and it is simply asking you **Does the patient need discharge transport arranged?** → Click **Yes. → Fill out the cascading rows on your own. →** Click **Next.**

7. **Expected Discharge:** Nurse, Providers and Case Managers all have access to this section. Fill this section out if it has not been filled out and you know when the expected discharge will be. Filling this section out helps the discharge planners to know when beds will be available. → Click **Next.**

8. **Discharge Milestones: Assigning yourself to your patients is important, without assigning yourself you would not see all of Case Mgmt discharge readiness. If you do not see it, click on +add Milestones. →** Click **Case mgmt. discharge readiness. →** Click **Accept.**
   a. When it is complete you will click on the button **under the Complete? Column.**
   b. You will be able to see the change in the patient **Story Board by hovering over Admit to INPT.**

9. **The Next 4 sections in your Navigator all work the same way but notify different agencies.**
    a. Destination: **Send information directly to a SNF or Assistant Living.**
    b. DME Coord: **You can send you DME order directly to the DME providers.**
    c. Dial/Inf: **Send information to Davita or a Kidney Care Center.**
    d. Home Care: **Send information to a Home care facility such as Aspirus at Home**.

10. I will walk you through entering in a **Destination Section**. **Reminder: We are working in a training environment, the Fax and In Basket are turned off. It will work and act slightly different in Production.**



1. **Fax:** Reports are sent to the fax number stored with the selected facility directly from Epic through faxing integration.
2. **In Basket:** Available only if the facility is connected to your organization via **EpicCare Link** In that case, you can send an In Basket message to the post-discharge service.

11. Click on the **Destination**. → In the **Search for service provider** window, (for training) type in **Wausau. → Click on Wausau Manor, Applegate Terrace, Benedictine Living community. → They should all be you side bar. →** Click **Accept.**

12. **Notice they are highlighted in light blue and the Fax and In basket is in a dark blue? →** Click on the **Internal comments in each facility and add patient 1st, 2nd, or 3rd choice. Use the SmartPhrase .cc1, .cc2, or .cc3. →** Click **Accept** after each one**. →** Click on the **magnifying glass** by the **stop sign. →** Choose **the Discharge Placement – SNF. → Click Preview Report. (this report has all the requested information needed to place a patient). →** Click on the **Comment and type in your name and contract phone number. → Review the report. →** Click the **X** at the top of the report to close it. → Click **Send**.

When you click on the facility name You can see the status of

- **Pending –** Will show Pending after you send information and before you receive an answer back from the facility.
- **Accepted –** Once an **EpicCare Link** facility has accepted a patient on their end, this will automatically **change the Pending to Accepted in Epic**. Facilities that **do not** have **EpicCare Link** you will need to click Accepted manually.
- **Declined – Once the EpicCare Link** facility has declined a patient on their end, this will automatically **change the Pending to Decline in Epic**. Facilities that **do not** have **EpicCare Link** you will need to click Declined manually.
- **Internal Comments -** You will see **comments typed** in from the **facility.** Example: **Facility Full. Reminder: Always put in the patient choice in this area.**

For training purposes, we will speed things up and say we have heard back from each facility. I will walk you through the next steps.

13. Click on **Artisan House**. → Click **Declined**. → Click **No contract with patient's insurance carrier.** → **Notice the Communication History?** → Click on the **Artisan House** to close that section. → **Look now the Artisan house has moved to the bottom with Declined.**

14. Click on **Benedictine Living Community**. → (Because they have EpicCare Link, it will be done automatically on their end when they make their selection, in the training environment we will document it manually) → Click **Accepted**. → **Close** this section. → Notice now it says Accepted above **Benedictine Living Center**.

15. Click on **Wausau Manor**. → Click **Accepted**. → right under that section there is a question: **Selected service provider for Skilled Nursing**? Click **Yes**.
    a. **Once the patient has chosen a facility besides entering the comments in the internal comments section. You also need to say Yes to this question. This is verifying the patient choice.**

16. **Closed Wausau Manor. → Look right above Wausau Manor it says Accepted & Selected.**
17. **If the facility asked you to resend the fax, Under the Communication History section on the right-hand side you will see a resend button. Just click that to resend what you have already sent them. (You will not see this in the training environment)**

You will receive an In Basket message from the SNF when the patient has been accepted. The In Basket Message name is Service Requests.
All Case Managers will receive the message. You will need to click it done after you are reading it. But a reminder if you are sharing the person with another case manager you will need to work out how you "done" your messages.

18. **Document Builder- You can use document build if the facility has requested additional information on the patient. Follow these steps. →** In the **Destination section** click on **Build Document. → The side bar will open to Document Builder. These tabs are the same tabs you have in chart review, except for Patient. When you click on Patient and Demographics this will send a Face Sheet. Lab will have Labs, Imaging will have X-Rays and Ultrasounds, etc. Under the Other tab are Orders.**
    Take a moment to click on some of **these tabs** to see what they have under them. **→** For training today, click on **Patient & Demographics. →** click **Generate Document. → (**the document will fail in the training environment). → The next steps will be click either Fax or In basket and then click send.

Reminders:

1. **Always send the Discharge Placement report- SNF. This report has all the requested information.**
2. **Another nice report is All Meds- (this is the MAR report)**
    Both Reports are under Reports to send.

19. **Work on your own in the DME, Dial/Inf and Home Care section. If needed, follow the directions above, these areas all work the same.**

20. **You will need to enter a DME order to send to the DME facility.** Click on **Order Activity. → Dismiss the BPA. → in the Side bar, Place new order window,** type in **DME AIR. →** click on **After Visit Procedure. →** click on **Air Purifier. →** click **Accept. → The order composer will open.** Length of Need type in **1 month**. → click in the comment section, fill in each hard stop ***, click F2 on your keyboard to move to the next ***. Notice on the bottom there is a physician face-to-face sign off. → click **Accept. → Sign** the order. → **Associate the Diagnosis to Pneumonia** by clicking on it. → click on **each line to fill in the answers on the ICD-10 calculator**. → Once the green bar is on the bottom you are good to go. → click **Accept. →** Sign the order **verbal order with readback**. → Ordering Provider, type in Lau,gor, enter. **Laurence Gordon** will pop in the **Ordering and Authorizing Providers**. → click **Accept.**

21. Click back on the **Case Managers Navigator** & work on your own.
    a. In the DME Coord. Section, Under the Report to send, you will send the **DME order**.

22. **Readmission Assessment:** Use this section when a patient is **Re-admitted**. Walk through this section on your own to get acquainted.

23. **Utilization Review – We will review this section on the Utilization Review Guided Practice.**

24. **Patient Instructions – What is typed in each one of these sections, it will flow to the AVS for the nurse to review with the patient at Discharge.**

25. Click on **Patient Instructions.** → Type in anything you would like**.** → click **Next.** → Type in anything you want in **Appointments.** → click **Next.** → **Follow Up section.** You should see **Wausau Manor** listed here. This section is used by Nurses and Unit Clerks to add appointments in for the patient to see the appointments on the AVS. Any additional appointments you can also make here, by adding it in the Provider or Organization window. If you would like, Try it out. → click **Next. Ad-HOC Comm.** → Click on + **New Communication→ Ad- Hoc will help you in a few ways,** this is one way you can send information to the **PCP or if a facility is not listed in Epic you can send a report of though this section.** → Click on **Free Text.** → **Enter in Facility name & a Fax Number.** → Click **Accept.** → Click on **Attach Reports.** → **Click on the Discharge Placement SNF.** → **Click Send Now. (You would follow the same steps if you are sending to a PCP).**

26. **Lace Tool. Lace Tool is required on Admission and then again at Discharge. The nurse will do the Admission, Case Managers are required to do the Discharge Lace Tool. Review this section and complete the lace score on your own. Notice how some row auto calculate.** → Continue down to **Interventions – Care Coordination Only**. → Click **Next.**

27. **Preview AVS.** → **The Nurse will print the AVS at Discharge and review this with the patient.** Notice you can change the Font Size & the Language**.** → **Scroll down the AVS and notice the items that flowed into it.**

This completes your **Case Manager Patient List & Navigator** Guided Practice Session. This is not all inclusive of a typical workflow it only highlights specific portions of the Navigator**.**