



## Future State: Case Management Consult and Progress

Cerner Workflow ID: Client Workflow ID: 1276

Last updated by Christina Carile, Nov 29, 2024 12:48pm (UTC -5 hours)

**Workflow Details:**

Workflow Name: Case Management Consult and Progress

Workflow State: Future State

Workstream: Other

Venue: Acute Care  
Rehabilitation

Client Owner:

Cerner Owner:

Standard: Yes

Related Workflow(s):

Tags:

**Workflow Summary:**

Service Line:

Related Solution(s): Point of Care

Project Name: Niagara Health System:OPT-0297674:NIAG\_CD Niagara HIS RFP

TestBuilder Script(s):

Cerner Workflow ID:

Client Workflow ID: 1276

Workflow Notes:

Introduced By:

Validated By:

**Swim Lane:**

Role(s): Attending Prescriber [Custom]

Department(s):

Security Position(s):

**Start/Stop [4]**

Description: Prescriber orders Consult to Case Management

Method: PowerOrders

Step Impact: Training

Comments: The Case Managers have access to the Consult to Case Manager order. Teams to operationally determine if Case Managers can place their own consult order as needed.

**Swim Lane:**

Role(s): Case Manager

Department(s):

Security Position(s):

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**Work Step [5]**

Description: Receives notification of the tasking on Multi-Patient Task List (MPTL) for Case Management Consult

**Work Step [7]**

Description: Reviews patient chart

Method: PowerChart

Step Impact: Training

**Decision [10]**

Description: Did the patient consent to initial consult with Case Manager?

**Work Step [15]**

Description: Complete consult and retrieve document from the MPTL. Sign the PowerForm.

Method: PowerForm

Step Impact: Training

Comments: If the Consult to Case Management PowerForm was retrieved prior to document consent not obtained, the Case Manager will have to AdHoc the Consult to Case Management PowerForm from the AdHoc folder.

**Decision [17]**

Description: Is ongoing support required with Case Management?

**Work Step [29]**

Description: Continue to facilitate supportive discussions with patient/caregiver(s) to help navigate the care journey

**Work Step [21]**

Description: AdHoc Case Management Progress Note PowerForm and document as needed

Method: PowerForm

Step Impact: Training

Comments: The Case Managers are to document any progress or interaction with the patient, by using the Case Management Progress Note PowerForm. This PowerForm is available in the Case Manager's AdHoc folder.

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The Case Manager can document at their discretion. The Interdisciplinary Team Conference PowerForm is another form of documentation regarding the Team Conference meeting.

**Decision [34]**

Description: Is a family meeting required?

**Off Page Reference [39]**

Workflow Link: Ambulatory - Referrals (Originating)

Comments: Order Home Care for a family meeting via this process.

Also, a Hospice referral is facilitated through this process.

**Start/Stop [41]**

Description: Patient ready for next stage in care journey

**Off Page Reference [42]**

Workflow Link: Case Management Discharge Process

**Start/Stop [12]**

Description: Retrieve the PowerForm task from the MPTL, and document consent not obtained; OR Reschedule the task and provide reason

Method: PowerForm

Step Impact: Training

Comments: If the Case Manager decides to not retrieve the PowerForm from the MPTL to document consent not obtained, the Case Manager can choose to use the "Reschedule this task" function, by right-clicking the task, rescheduling for a different date/time, and providing a reason for rescheduling.

If the Case Manager retrieves the PowerForm from the MPTL and signs the document, the task will complete. The consult order status will also change to "Completed" - indicating the consult order was addressed.

If the Case Manager retrieved the PowerForm to document consent not obtained, the Case Manager will have to

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AdHoc the Case Management Consult PowerForm at a later time if they see the patient later and the patient consents.

The Consult to Case Management PowerForm task will remain on the MPTL for 7 days or 168 hours from the time the consult order was placed. Rescheduling the task will reset the task timer. The latest time the task can be rescheduled is the 7th day from the original consult order.

**Work Step** [19]

Description: Discuss with interdisciplinary team; clearly document in the Case Management Consult PowerForm

Method: PowerForm

**Decision** [23]

Description: Is a Team Conference required?

**Off Page Reference** [27]

Workflow Link: Rehab Therapies HDS & WHS Team Conference