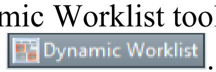
CommunityWorks Ambulatory Dynamic Worklist

Overview

Clinicians can use the Dynamic Worklist to identify subsets of patients in PowerChart, gather relevant information about them, and act upon those findings. The basis of the Dynamic Worklist is formed by provider groups within the organization and can be filtered down with other criteria. The Dynamic Worklist allows you to:

- Create a worklist based on selected parameters.
- Save, modify, rename, or delete a worklist.
- Set a worklist as default.
- Sort the worklist by patient name (by default), rank, or qualified date.
- Manually add or remove patients from the worklist.
- Open a patient's chart (by clicking the patient's name)
- Document an assessment, send a secure message, and create reminders from the worklist.

Accessing Dynamic Worklist

To access the Dynamic Worklist tool, you will see the following button available in your PowerChart toolbar 

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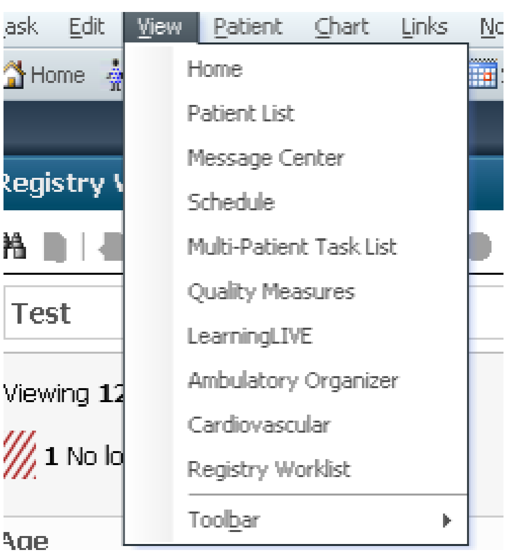


The first time you access this tool, your page will be blank. To use these tools, an SR must be logged to EMR support with the following information attached.

- Please provide a list of clinic or location names (which will be the name of the provider group). Example: Sunflower Family Medicine. Please also include the providers at those locations, first and last name. Only include providers that you will want to collect data on within the Dynamic Worklist. Example: Dr. John Smith

- Please provide a list of registries that should be built for your Dynamic Worklist. The registries are a way to easily track and manage different patient populations. This piece allows you to group patients from a third-party source, such as Blue Cross Blue Shield. For example, a registry could be: High Risk Registry, Care Gap Registry, BCBS Registry, etc.
- Below are the conditions that will be available as a standard via health maintenance rules. All these conditions will automatically be available when you get access to the Dynamic Worklist. These conditions are linked to diagnoses codes and the health recommendations within PowerChart.

    - Asthma
    - Diabetes (DM 1 and DM2 can be broken out into two separate conditions. Please indicate if you would like these separated for your diabetic population.)
    - Heart Failure
    - Obesity
    - Current Smoker
- In addition to the standard conditions above, we can add conditions to use with the Registry List Import tool. These conditions would be used when you are importing a patient list from outside resources. Please provide a list of other conditions that will be needed for import ONLY purposes. Example: Hypertension Support will notify you when your request is complete, and you can start using Dynamic Worklist.

The Dynamic Worklist Layout

Below you will find descriptions of each column that is found within the Dynamic Worklist.

Patient

- The Patient column displays the patient's name, date of birth (DOB), gender, Medical Record Number (MRN), ranking, and comment indicator.
- If patient is selected from the Dynamic Worklist, the patient will show as the "Patient of Interest" within the toolbar. The patient's chart can be easily accessed from this section.
- The patient's chart can also be opened by selecting patient's name from Dynamic Worklist.

Lifetime Provider Relation

- The Lifetime Provider Relation column will display the Primary Care Provider or Responsible Provider for that patient.

Conditions

- The Conditions column displays any conditions for the patient that has been established by your organization. Conditions will only pull from the chronic conditions from the patient's problem list.
- The following conditions are built as a rule within the Dynamic Worklist and will review the patient's chart for that condition. The conditions are built on certain ICD-9 codes, the same as the health recommendations tool.

    - Asthma – Any person with an active ICD code for Asthma
    - Current Smoker – Any person 18 years or older with an active ICD code for tobacco use
    - Diabetes I – Any person with an active ICD code for Diabetes I
    - Diabetes II – Any person with an active ICD code for Diabetes II
    - Heart Failure - Any person with an active ICD code for Heart Failure
    - Obesity – Any person 18 years or older with an active ICD code for obesity

Note

There are also additional conditions that can be used for importing purposes only. These will need to be requested through EMR support.

Payer/Health Plan/Class

- The Payer/Health Plan/Class column displays the insurance information.

Admission/Discharge Last 24 Hours

- This is not applicable to an ambulatory organization. It only applies to Inpatient or ED encounters.

Visits/Timeframe

The Visits/Timeframes column displays how many outpatient encounters have taken place for this patient within the past 365 days.

- Care Coordinator
    - The Care Coordinator relationship for that patient will display in the Care Coordinator column.

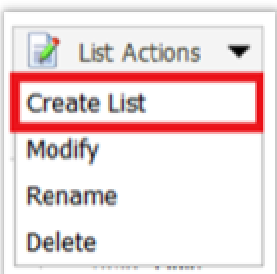
- Registry Import
    - The Registry Import column displays the name of the registry from which it was imported.
- Qualified Date
    - The Qualified Date column displays the date the patient was added to the list. This date is either when they qualified based on search criteria or when the patient was manually added to the worklist.

List Menu

Creating List

This feature allows a patient list to be created from the patient database with certain criteria established. It is important to note that when creating a list, it requires a Dynamic Worklist Group and a Provider Relationship type to be established. Once those have been selected, other criteria are available to narrow down the patient list results. It is Cerner's recommendation to select all the appropriate criteria to create a manageable list. Such as age, gender, condition, etc. Once the base list is created, the option to filter down further will still be available.

Complete the following steps to create a list:



1. From the List Actions menu, select create list.
2. Select the appropriate Dynamic Worklist Group(s).
3. Select the appropriate Relationship Type(s). The only relationship types that should be selected in the Cerner Ambulatory EMR are Primary Care Physician and Responsible Provider. Other relationship types are not being used currently.
4. Select filters for the list. The available filters are age, sex, language, race, case coordinator, financial class, health plan type, admission range, encounter type, appointment status, conditions, laboratory, measurements, vitals, medications, orders, expectations, and registry.

    Note

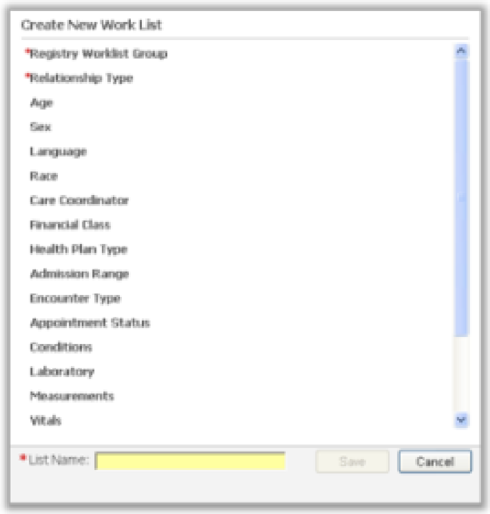
    A broad list will take longer to generate because it pulls in more patient data. Select more filters when creating the list to populate fewer patients.

5. Name the list.

Note

Special characters and punctuation are not allowed in the list name field.

6. Click Save to create the worklist.



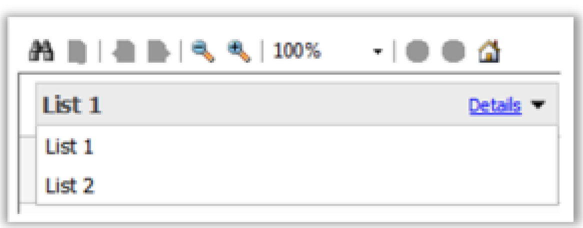
Note

Dynamic Worklist group and relationship type are required fields.

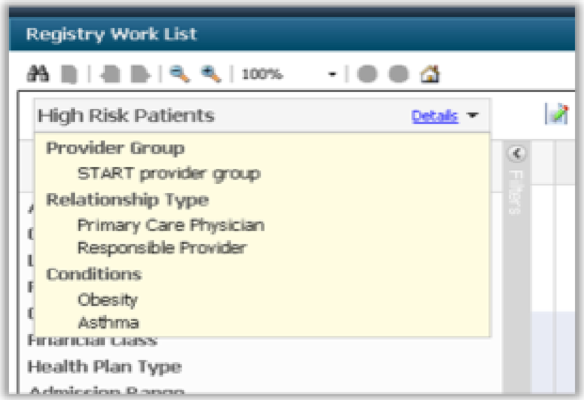
Viewing a list

Complete the following steps to view a list:

1. From the list menu, you can view all available lists.

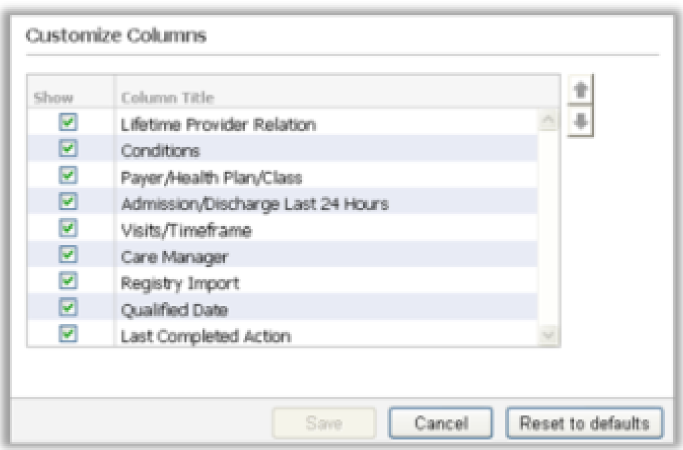


2. By hovering over the Details link, you can see the parameters for that list. These are the details that were selected when the list was created.



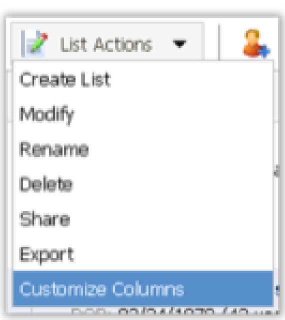
Customizing Worklist Columns

Each user can customize the worklist columns to their preference. The ability to show/hide and rearrange columns will be available.



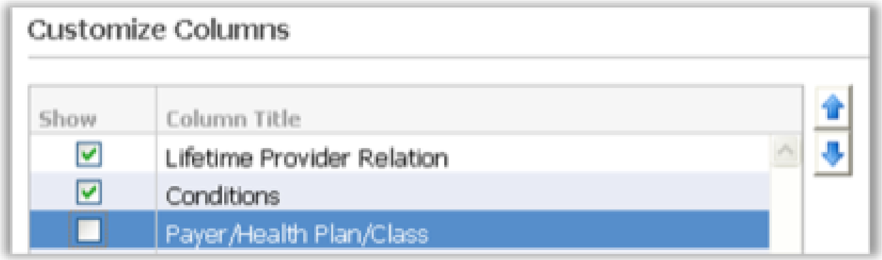
Complete the following steps to customize columns:

1. From the List Actions menu, select Create List.



2. To hide a column from the Dynamic Worklist, un-check the show box next to the column title that you wish to hide from the worklist

3. To re-arrange the columns, highlight the column title, and use the up and down arrows on the right side of the screen to move columns.

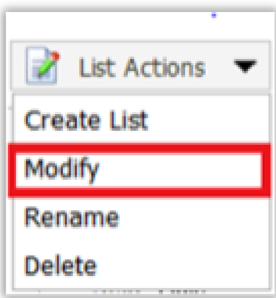


4. Select 'Save' to save any changes.
5. Select 'Reset to defaults', to revert to system default settings.

Modifying a list

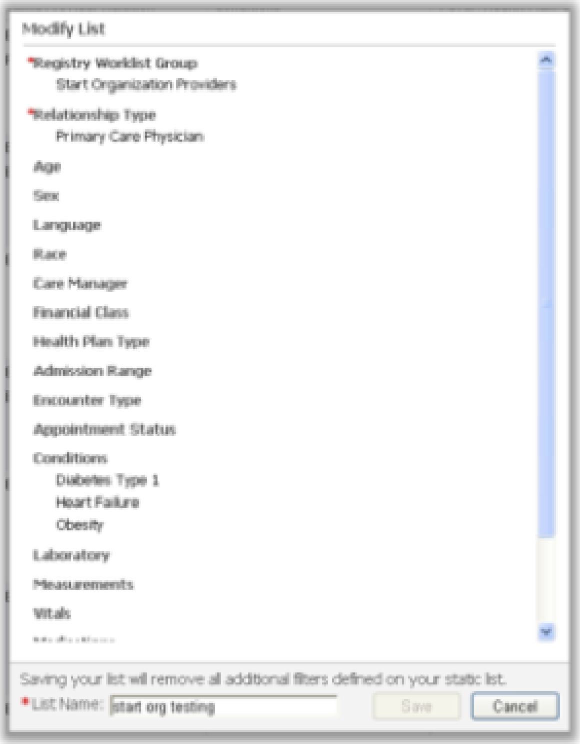
Complete the following steps to modify a list:

1. From the List Action menu, select Modify.



2. From the list of parameters, select your modifications.

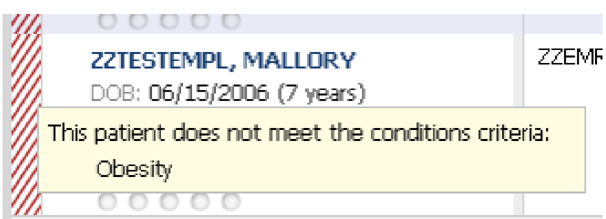
3. Click save to modify the list



Note

While in the Modify window, changing the list name will create a new list. If the list is saved with the same name, it will override the existing worklist.

If any parameters were changed and the patient(s) no longer qualifies, the patients will be noted with red and white lines in the first column. If you hover, it will show details on why that patient no longer qualifies. At this time, a patient can be removed from the list.

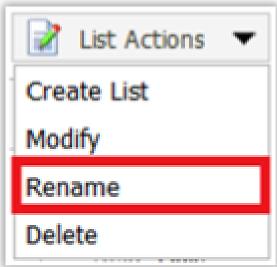


Renaming a list

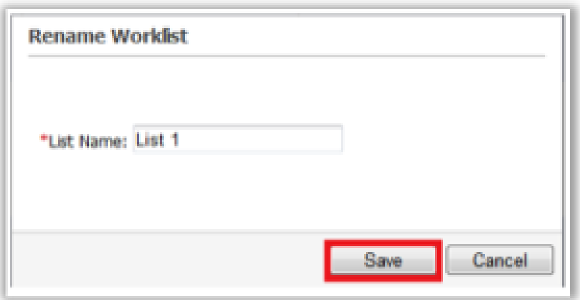
Complete the following steps to rename a list.

1. Open the appropriate list.

2. With the list open, select Rename from the List Actions menu.



3. Enter the new list name.
4. Click save.



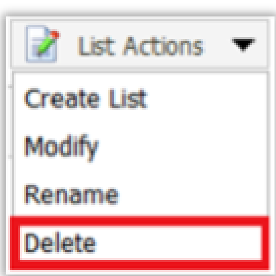
Note

Special characters and punctuation are not allowed in the list name field.

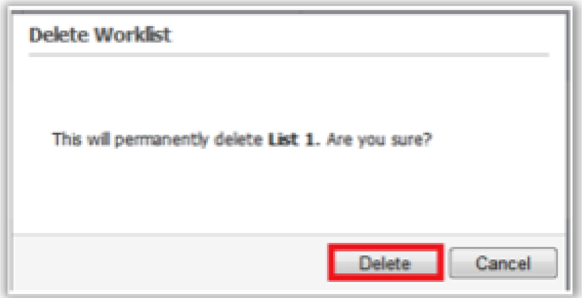
Deleting a List

Complete the following steps to delete a list:

1. Open the appropriate list.
2. With the list open, select Delete from the List Actions menu.



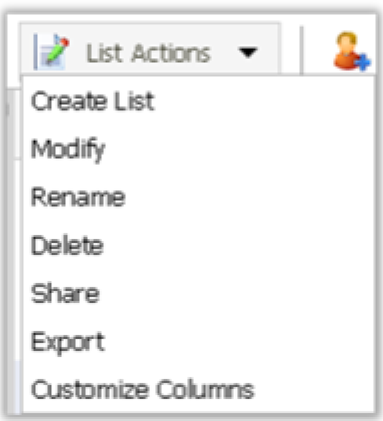
3. Confirm the action by clicking delete when prompted



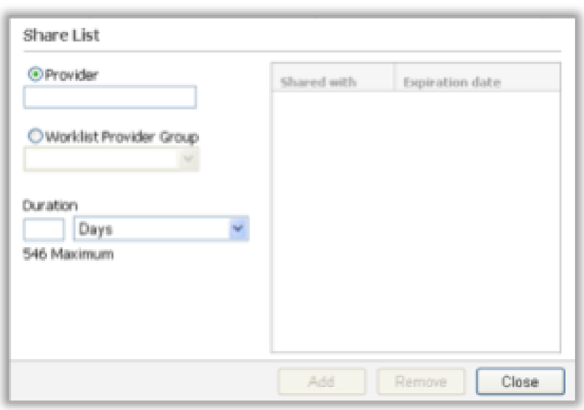
Sharing a list

Complete the following steps to share a list:

1. Open the appropriate list.
2. With the list open, select Share from the List Action Menu



3. The following window will open



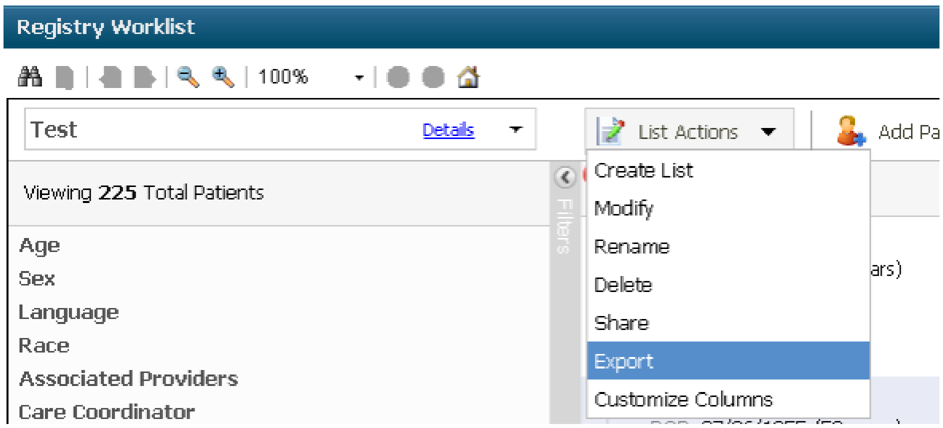
4. Select which Provider or worklist provider group that the list needs to be shared with
5. Select the duration.
6. Select add to share the list.

7. If a shared list needs to be removed, follow the exact same steps but select remove.
8. Click close.

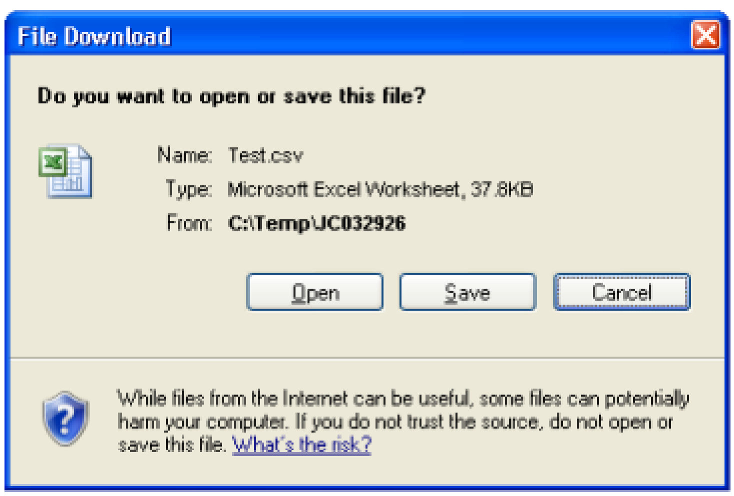
Exporting a list

Complete the following steps to export a list:

1. Open the appropriate list.
2. With the list open, select Export from the List Actions menu.



3. Click open or save the Excel worksheet locally to your computer



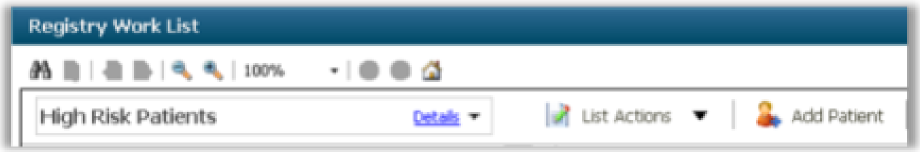
Note

If you attempt to export a list while patients are being added, you may see an error message.

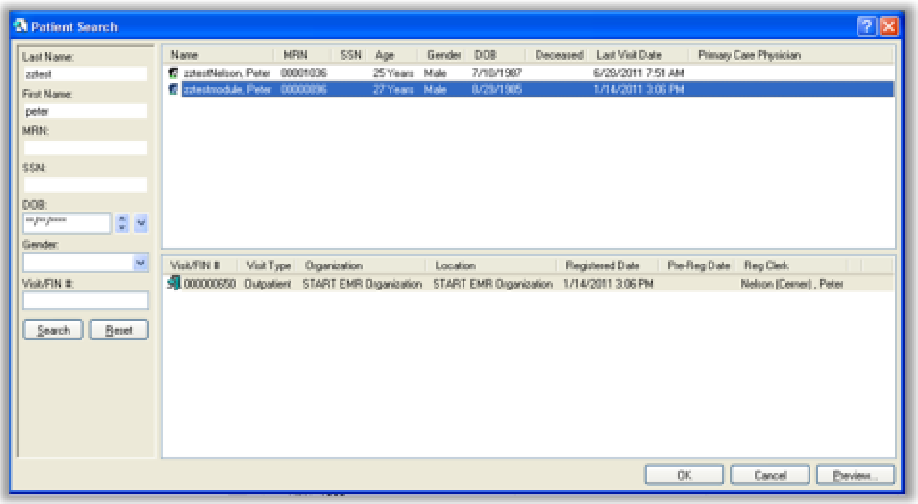
Adding a patient to the Dynamic Worklist

Once a list has been created, patients can manually be added to the patient list. Complete the following steps to add a patient.

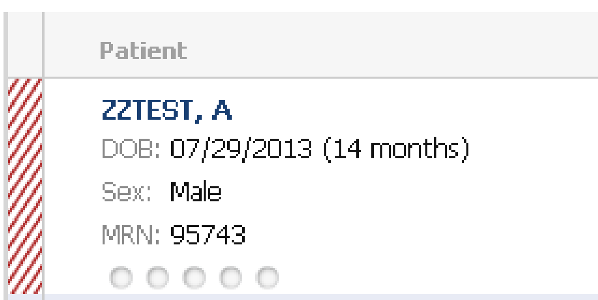
1. Select add Patient from the toolbar



2. In the patient search dialog box, use the search fields to find the patient.
3. Click OK to add the patient to the worklist



4. If a patient does not longer meet the initial qualifications of the list, it will be noted with a red and white banner.



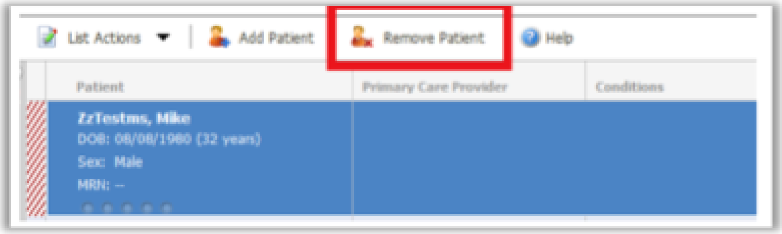
Note

The Add Patient button is only available after at least one worklist has been created.

Removing a patient from the Dynamic Worklist

If the list is modified and patients are no longer meeting the criteria, this will allow the option to remove patients. Complete the following steps to remove a patient:

1. With a patient selected, click Remove Patient on the toolbar

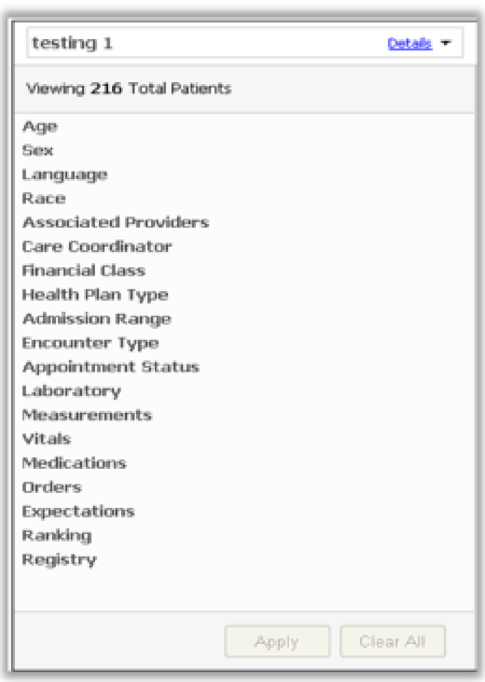


Note

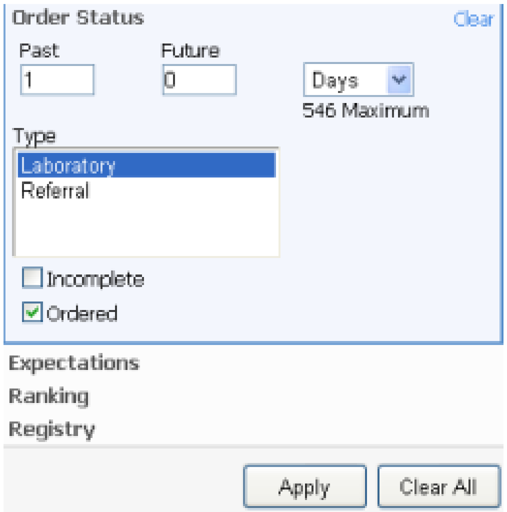
Only patients that no longer meet search criteria can be removed from the worklist.

Searching and filtering the Dynamic Worklist

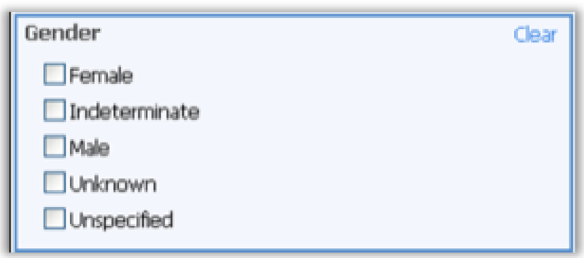
Once a base list has been created, the following areas can be used to search and filter the Dynamic Worklist. Using the filter/search option will only change the view; it is not modifying the actual list. When the filter is cleared or the list is closed, it will revert to the original list.



1. Selecting a filter heading will open a section with further details. Click Apply to select the filter changes. If a patient no longer meets the initial qualifications of the list, it will be noted with a red and white. To clear an individual filter, select the Clear link in the upper right-hand corner.



2. To clear all filers, click Clear All
3. To clear an individual filter, select the clear link in the upper right-hand corner of the selected filter



Filters overview

Below is an explanation of how to use each filter. Until a filter is applied, all patients who meet the criteria selected when creating the list will populate on the list. When filters are used in conjunction, they will limit the list to patients who meet all the filter criteria:

- <u>Age</u> – Select a qualifier (Ex: Greater Than) and an age or age range. This will filter the list to just display patients who meet these age criteria.
- <u>Sex</u> – Select the sexes for patients you would like displayed. Ex: select 'Female' to create a list that contains only female patients, select 'Female' and 'Male' to include both sexes in that list.
- <u>Language</u> – Select languages to generate a list with patients speaking at least one of those languages. The patient's preferred language is captured during registration.
- <u>Race</u> – Select the races that qualify a patient to be included in the list. Any patient with at least one of the qualifying races will be included.
- <u>Associated Providers</u> – If at least one of the selected providers is listed as the patient's PCP, Attending Physician, Admitting Physician, that patient will pull into this list. Available providers are based on the selected Provider Group

- Care Coordinator – Search for a care coordinator. This will limit the list to any associated patients.
- Financial Class – Select qualifying insurances. Patients with at least one qualifying insurance type will populate.
- Admission Range – The list will return patients who have a hospital encounter (Outpatient/Inpatient) during the selected admission range.
- Encounter Type – The list will be limited to patients with any of the selected encounter types.
- Appointment Status – Select a date range and statuses to see during that range. The list will be limited to patients with appointments in any of the selected statuses during the selected time frame.
- Conditions – Select 'And' or 'Or' and the conditions to populate the list with patients who meet those criteria.
- Laboratory – This filter is looking for lab results, not lab orders. Type the name of the lab test to use as a filter. Quantity represents the number of tests results in a patient's chart for the selected test. Value represents the test result – if you select a parameter other than 'Any', a box will appear to complete the value sentence. Select a look back range. Click 'Add' to include another lab test filter. Select 'And' or 'Or' when using multiple lab tests to populate patients with all selected tests or patients with at least one of the selected tests.

  Note

  When adding a filter such as laboratory events, only 3 results can be selected at a time. Once three have been selected, the Add button will no longer be available.

  Note

  This filter requires discrete lab data. Patients with lab results that have been scanned in will not meet the qualifications of this filter.

- Measurements – Similar to the Laboratory filter. Type the measurement name. Quantity represents number of recorded measurements. Value gives you the option to specify a range for that measurement. Look back range will set a time range for those results. Select 'Add' to include more measurements. Select 'And' or 'Or' to choose how to filter the patients’ using measurements.
- Vitals – Same as Measurements, but there is no option for 'Value'.
- Medications – Search for a medication name or classification. Select a status for that medication and a look back range. Click 'Add' to choose an additional medication and select 'And' or 'Or'.
- Orders – Select a time frame within which to search. Rather than searching for a particular order, you will select an order type by which to filter. Hold 'Ctrl' and click to select multiple order types. Choose the order statuses that you would like included.

  Note

When filtering for future orders, do not search in the past. Patients with orders that are now completed but were previously in a status of 'Future Order' will be included in the list.

- Expectations – Select the statuses of expectations to filter. Hold 'Ctrl' and click to select multiple expectations.

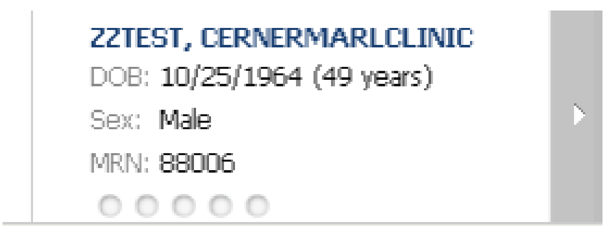
  Note

  Expectations filtering relies on Health Maintenance. To ensure you are getting the results you want, make sure that patients' health maintenance expectations are being satisfied.

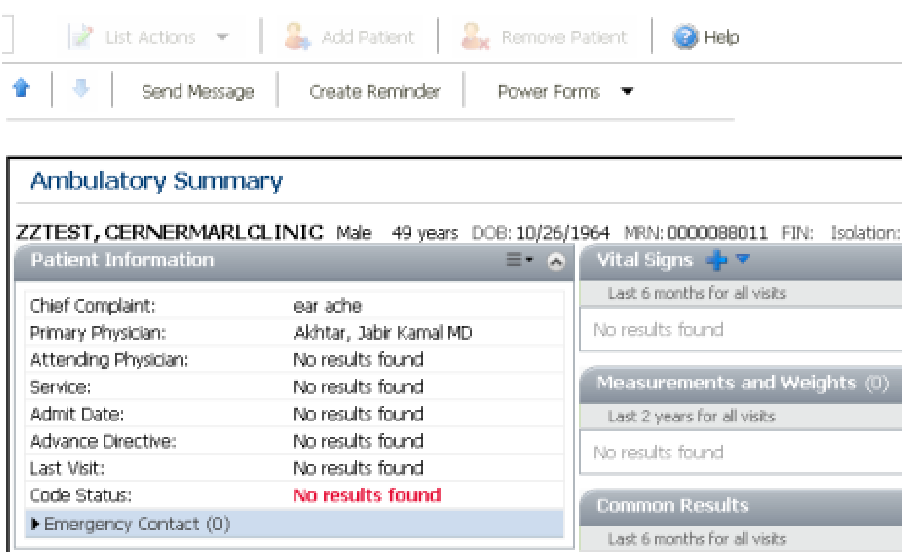
- Ranking – The list will be limited to patients who fall into or between the two filter levels selected. This will not sort the patients based on rank.
- Registry – If you have multiple registries, you can filter to view the patients by registry.

Expanded View

To open the extend view, hover over the right side of the patient column and click the arrow.



The expanded view will display the patient summaries page, as well as options to Send a Message, create a Reminder, and open Power Forms (Intake or Patient History forms).

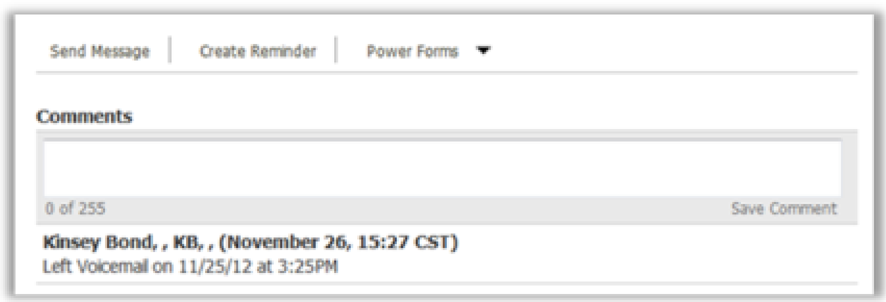


1. Scroll to the bottom to Add a Comment or an Action.

2. There are a few actions that can be taken place within the expanded view, which include adding comments, sending a message, creating a reminder, and adding documentation on a powerform.

Adding a Comment/ Action

To enter a comment or an action (a comment with a task box that can be checked to indicate it has been completed), use the free text field to type up to 255 characters. If a patient qualifies for multiple worklists, all comments/actions will be displayed across all worklists.

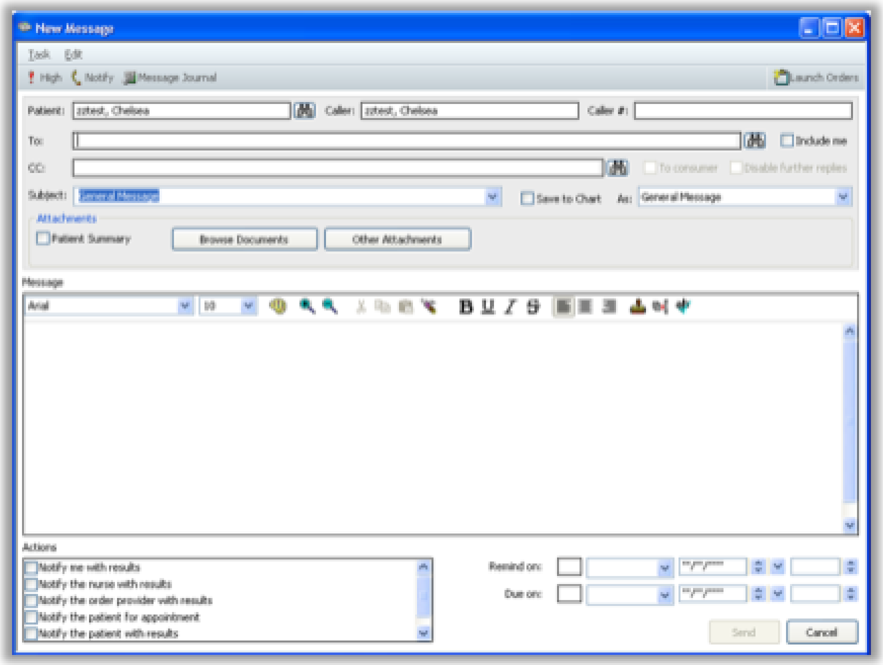


Note

Users can only delete their own comments/actions.

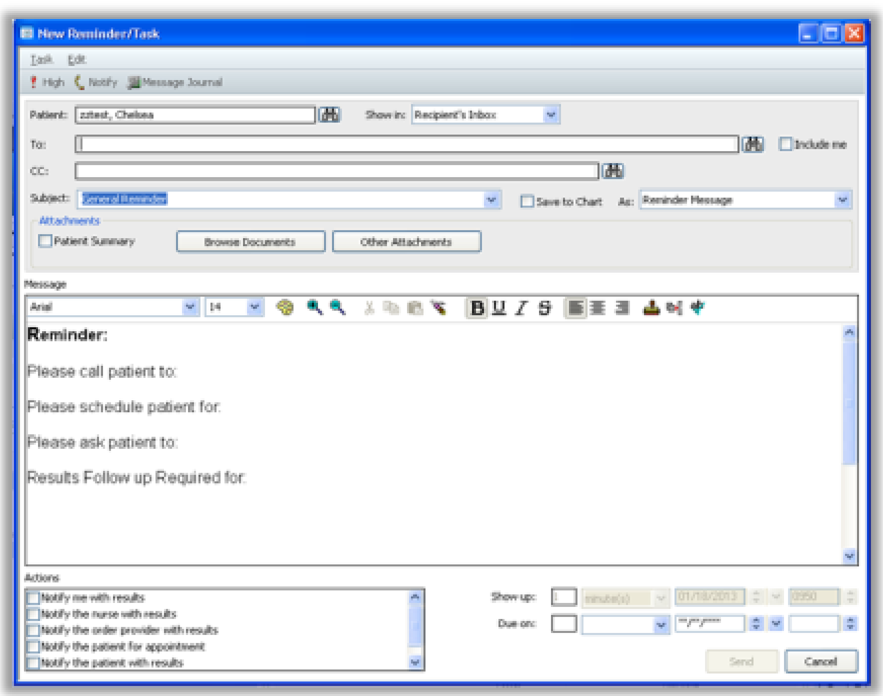
Sending a message

Clicking send message will open the new message window from Message Center.



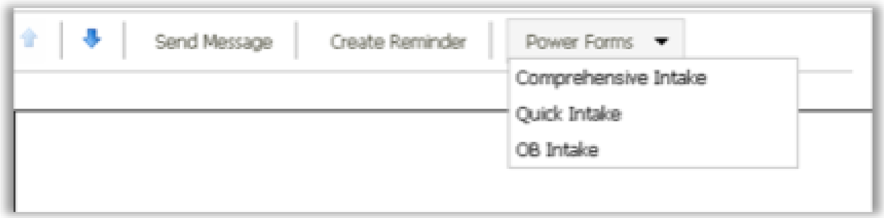
Creating a Reminder

Clicking create reminder will open the new reminder/task window from Message Center.



PowerForms

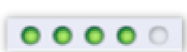
Selecting the PowerForms dropdown will show the available PowerForms that can be documented for the patient



Ranking Patients

The ranking system allows a clinician to prioritize the patients on the list

1. To assign patient ranking, select the appropriate ranking within the five ranking circles provided

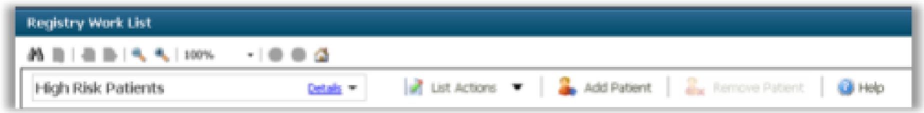
   Note

   If a patient qualifies for multiple lists, the ranking is specific to each list and will not be shared across lists.

2. To remove a ranking, click on the left of the first ranking circle and ranking will be cleared.

Help Screen

A help screen is provided in the Registry Work List toolbar. This will provide additional training materials and information, if needed.



Known Issues

Within the patient expanded view, the patient's summary will be available. Currently when you navigate to the expanded view, the following message appears: "Summary mPages are not currently configured. Please contact your system administrator". This will be resolved in a later phase of the Dynamic Worklist, scheduled for later this year.

Troubleshooting Tips

- If a patient you expected to be on your list does not appear, manually add that patient. Once added, the red & white bar will appear next to that patient's name. When you hover over that bar with your mouse, a message will display indicating why the patient did not meet the list criteria.
- If a column fails to load, a red X will appear at the top of the column. Refresh the page and the data should finish loading. Please contact EMR support for assistance if issues continue.
- If for any reason Dynamic Worklist fails to load, an error will appear at the top of the page. The main cause of this error is that the list you are creating is too large (approximately 1,000 patients). Please attempt to narrow down the criteria on your list and try creating the list again. If this error continues to happen, please contact EMR support for assistance.