From the Office of Clinical Informatics

Quick Reference Guide (QRG)

Beacon Health Workflows

Care Manager Supervisor and Clinical Review Associate

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This Quick Reference Guide (QRG) reviews the Beacon Health Workflows for the Care Manager Supervisor and the Clinical Review Associate.

Common Buttons & Icons

Care Managers ×	**Care Managers** tab
Case List ×	**Case List** tab
▸	**Expand** icon
40 minutes ago	**Refresh** icon
+	**Plus** icon
⌄	**Down Arrow** icon

Assign a Patient to the Care Manager

➢ From the Care Manager Management Dashboard:

STEP 1: Click the **Care Managers** tab.

STEP 2: Click the appropriate Care Manager **Expand** icon.

STEP 3: Scroll down to the Potential Cases section.

STEP 4: Select the appropriate location using the **Assigning Location** drop down list. The potential cases list updates according to the location assigned.

STEP 5: Select the check box next to the appropriate unassigned patient; then, click **Assign Selected**.

NOTE: **The list will automatically update and display a green checkmark next to the patient. The Care Manager's Current Cases will also update on the Care Managers tab.**

Search for a Patient

➢ From the Care Manager Management Dashboard Care Managers tab:

STEP 1: Click the appropriate Care Manager **Expand** icon.

STEP 2: Scroll down to the Potential cases section.

STEP 3: Click the **Person Search** field.

STEP 4: Enter the patient name; then, click the patient in the list.

- If the patient does not display, use the following steps:
- Click View all results. The Search Results window displays.

- Click the appropriate patient; then, click Select.

Add a Patient Referral

➢ From the Care Manager Management Dashboard Care Managers tab:

STEP 1: Click the appropriate Care Manager **Expand** icon.

STEP 2: Scroll down to the Care Management Referral section; then, click **Search for a Person**. The Person Search window displays.

STEP 3: Click the **Name** field.

STEP 4: Enter the patient name; then, click **Search**. The Search Results update in the right pane.

NOTE: If patient does not display, use the add a new person approved workflow. See your departmental leadership for instructions.

STEP 5: Select the appropriate patient; then, click **OK**.

STEP 6: Select the Assigning Location using the drop-down menu; then, click **Next**.

STEP 7: Select the Referral Source, Referral Reason, and Case Type; then, click **Create Case**. The patient now displays in the Care Management Referral section.

Reassign a Patient Case

➢ From the Care Manager Management Dashboard Care Managers tab:

STEP 1: Click the patient from the current Care Manager's referral section. The patient's chart opens.

STEP 2: Click the current Care Manager's name in the Case Personnel section. The Reassign Case window displays.

STEP 3: Click the **Personnel Search** field.

STEP 4: Enter the new Care Manager's name; then, click **Reassign**.

NOTE: Use the Search icon as needed to find the correct Care Manager.

Add a Communication Event

➢ From the patient's chart:

STEP 1: Click **Activity Log**.

STEP 2: Click + in the upper right corner. The Add Communication Event pane displays.

STEP 3: Complete the required fields and add any notes, if necessary; then, click **Save**.

Begin the Care Coordination Form

- From the patient's chart:

STEP 1: Click the **Active Case** tab.

STEP 2: Click **Screenings and Assessments**

STEP 3: Click the **Down Arrow** icon.

STEP 4: Click **CM Care Coordination Form**. The form opens in a new window.

STEP 5: Document the required and necessary fields; then, click **Sign.**