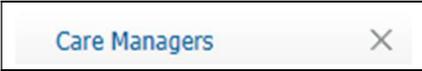
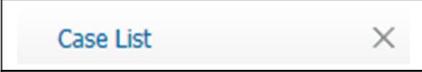
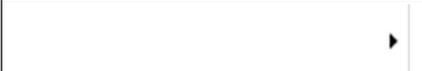

This Quick Reference Guide (QRG) reviews the Beacon Health Workflows for the Care Manager Supervisor and the Clinical Review Associate.

Common Buttons & Icons

	Care Managers tab
	Case List tab
	Expand icon
	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**.