Patient Call Manager℠
Enhanced Call List

Version 1.2

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Section One: Getting Started

1.1: What is the Patient Call Manager℠?

The Patient Call Manager℠ is designed to automate the pre-visit and post-visit call process. It allows your organization to standardize the questions asked during these calls, provides staff with a fast and easy way to make the calls, record patient feedback, and allows leaders to create easy-to-read reports based on the data gathered.

Features:

- Fully HIPAA compliant tool
- Supports pre-visit, IP, ED, OP, and Observation patient classifications
- Easy “click and go” functionality
- Automated call documentation and electronic signature integrated into medical record
- Hospital-designed pre-visit and post-visit patient questions based on nursing unit, clinical department, diagnosis, doctor, etc.
- Automated email notification related to reward and recognition, adverse outcomes, and risk management
- Easy to pull reporting based on patient, callers, and/or unit/leader metrics
- Pre-defined call lists by: patient type, diagnosis, nursing unit or clinical department, day of discharge/visit, etc.

1.2: What is the purpose of post-visit phone calls?

The purpose of calls is to improve patient compliance, which improves clinical outcomes. Calls also show empathy; drive reduced preventable readmissions through increased compliance; raise HCAHPS; collect feedback for reward and recognition for departments, individuals, and physicians; and harvest process improvement. It also affords an opportunity for service recovery in cases when we have failed to meet a patient’s or a family’s expectations. It can result in reduced complaints/claims and is our last chance to fix a problem.

1.3: What types of questions are typically asked during post-visit phone calls?

Quality-centered questions, as you are calling to see how the patient is doing at home.

One of the primary purposes for discharge phone calls is to drive clinical outcomes. The main objective of introducing these calls is to check on the patient to increase patient compliance, improve clinical outcomes, and assist the patient with their transition from the hospital to the home environment. With 19 percent of patients being discharged having adverse events based on a study in 2003 in the Annals of Internal Medicine, we must make calls to prevent these from occurring. The most alarming part of the study was that out of the 19 percent having adverse events, 66 percent of those were adverse drug events, because patients are discharged not understanding their medications, side effects, or even how to appropriately use them. Each area can identify areas of focus to ask patients regarding clinical care.
Section Two: Portal Login

2.1 How to log in?

• To access the Patient Call Manager, first go to the Studer Group Portal.

• Use the fields provided to enter the user name and password that were provided to you, and click “Login.” You will then go to a portal page that provides a listing of the Studer Group accelerators to which you have access.

• If you have forgotten your password, just click on the “Forgot Password?” link. You will be prompted to enter your user name, and then your password will be emailed to you.

• To go to the Patient Call Manager, click on the PCM tile.

• If you wish to change your password, you can click on your name in the upper right corner to open your profile. There you will see an option to enter your current password and the new one.
Section Three: Patient Call List and Functionality

3.1: Overview of Patient Call List

The Patient Call List is users can view the list of patients in their department/unit who require calls. Your Organization sends a data file each day to PCM indicating which patients to place onto the call lists, including the patient demographic information displayed in both the patient tiles and call questionnaire.

- With the enhanced Call List a User can select which Call Type they wish to see on the PCM screen:
Each user now has the capability of selecting which columns they would like to see on the Call List:

- The Enhanced Call List now gives you the capability of searching for “Active” Patients directly from the Active Call Screen instead of changing views to a different tab.

- All Users now have the capability of dragging each header row to rearrange their individual view by simply left clicking the header they wish to move and dragging it to the desired location in the row:

**Before (Age column is after Status)**

<table>
<thead>
<tr>
<th>Call Status</th>
<th>Survey Number</th>
<th>Action</th>
<th>Patient Name</th>
<th>Status</th>
<th>Age</th>
<th>Scheduled Call Date</th>
<th>Department/Unit</th>
</tr>
</thead>
</table>

**After (Age column is now before Status)**

<table>
<thead>
<tr>
<th>Call Status</th>
<th>Survey Number</th>
<th>Action</th>
<th>Patient Name</th>
<th>Age</th>
<th>Status</th>
<th>Scheduled Call Date</th>
</tr>
</thead>
</table>
Users can now see Patient Demographics without having to open the call tile by clicking on the “+” next to the respective patient under the Call Status column. This will allow a quick view of patient demographics without the risk of the call being marked as an attempt.

3.2: Call History

- Call history is now easily accessible from the call list. Click the circle arrow icon to open a full call history for the last 30 days.
- **Note:** A red border will appear behind the call history icon to indicate a patient that has been readmitted and called in the last 30 days.
3.3: Assigning Specialized Question Groups

Under the “Spc Question Groups” column, located on the Patient Call List, PCM will automatically suggest a Specialized Questions Group if configured by your Admin or you will see a link that says edit. This allows you to assign specialized groups of questions to patients who meet certain criteria, such as a particular diagnosis. If PCM has suggested a Specialized Question Group that is correct for this patient you can click the “check” icon to accept. No further action is required.

If no suggestions has been made, click the edit link to see the specialized groups that have been set up by your organization.

Non-Serial Groups
- Some groups are non-serial, meaning that this is a one-time call for this patient’s visit. These are displayed in the “Select Non-Serial Group(s)” section.
- Place a check-mark in the desired box(s) to place a patient into the Specialized Question Group(s)
- By making a “Spc Question Groups” selection for a patient call, predetermined questions will populate in the call questionnaire so you may ask these questions as well.

Serial Group
- Some specialized questions are serial, meaning that the patient will receive a series of calls, based on his or her medical condition.
- The patient will be placed on the “Active” call list on a pre-determined frequency (determined by the organization) based on your Serial Group selection.
- For example, organization may want to call patients identified as CHF every 7 days for the first 30 days after a patient goes home.
- Use the drop-down menu provided to select a serial group

- After you have made your selection, click “Save.” If you are not selecting a Specialized Question Group, click “Close” to exit out of this screen.
3.4: Rescheduling a Call

- If you need to change the scheduled call date, click the "Reschedule" link at the bottom right-hand corner of the patient tile.
- Then use the Reschedule Call Date field and the Preferred Call Time menu (optional) to indicate when this patient should be called next.
- Note: If necessary, use the comment field to explain this status.
- Click "Save" when you are finished. If you are not rescheduling the call or selecting a call status, click "Close" to exit out of this screen.
- You may also use the menu provided to indicate the current call status, such as:
  - Busy
  - Do Not Call (which will remove this patient from the Active list)
  - Left Message
  - No Answer
  -

3.5: “Active” Patient Call List

- Click on the “Select Calls Type" dropdown at the top left of the patient call list and choose "Active" to access the list of active patient calls.
- The tiles you see represent a patient who should receive a call. Each tile provides the patient’s name, department/unit, physician, and other details that can also be used to sort this list.
- There will be a blue icon representing an “Active” patient under the Action column:
- Patients will remain on this list for a certain number of call attempts or a certain number of days after the scheduled call date. Once a patient call records hits the max number of call attempts or days, the patient record will drop from the Active list and go to the Dropped list. NOTE: These settings are customized for your organization, and managed by your PCM Administrator.

3.6: “Dropped” Patient Call List
• “Select Calls Type” dropdown at the top left of the patient call list and choose “Dropped”. The maroon tiles you see on these pages each represent a patient who was on the active call list, however dropped to this list. This can occur when:
  o The patient has remained on the Active list for a certain number of days following his or her scheduled call date
  o (designated by your hospital) OR
  o The patient had a certain number of call attempts associated with this record (designated by your hospital)

• There will be a maroon icon representing a “Dropped” patient under the Action column:

• Each tile provides the patient’s name, department/unit, physician, and other details that can also be used to sort this list.

• Although these patients are not on the “Active” list, you may still complete these calls or reschedule them to a later date if necessary. When you reschedule a patient on the “Dropped” list, the patient will be moved back to the “Active” list for additional call attempts.

• If you wish to complete a survey for a dropped patient, click the “Begin Survey” or “Continue Survey” link below that person’s name and complete the survey as described in Section 4: Conducting a Patient Call.

3.7: “Search” Call List

• Click on the “Search” dropdown at the top right of the patient call list
• Use the fields provided to search for patients by:
  o First Name
  o Last Name
  o Attending Physician
  o Language
  o Caller Name, etc.
3.8: Color Coding Data Stratification (Color Borders)

With the introduction of the Enhanced Call List comes a new look for Color Borders!

- PCM will color-code patients based upon the criteria that a PCM Administrator sets up just like the previous version of the call list provided but with a great new look. Instead of the entire patient tile being color coded now the color border will appear around the Patient Name under the Patient Name column:

Section Four: Conducting Phone Call

4.1: Beginning or Continuing a Call

- To initiate a patient call, click the “Begin” icon located under the “Action” column,

- or the “Continue” icon located under the “Action” column.
### 4.2: Navigating the Patient Questionnaire Screen

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Patient name and phone number(s)</td>
</tr>
<tr>
<td>B</td>
<td>Patient demographic information section</td>
</tr>
<tr>
<td>C</td>
<td>Update Phone Numbers: Use this link to add or change the patient's phone number(s)</td>
</tr>
<tr>
<td>D</td>
<td>Wrong Number: Use this link when the phone number given for this patient is incorrect. This will remove the patient from the call list.</td>
</tr>
<tr>
<td>E</td>
<td>Do Not Call: Use this link if the patient indicates that he/she does not wish to be called. This will remove the patient from the call list.</td>
</tr>
<tr>
<td>F</td>
<td>Show All Physicians: Use this link to see a list of all the physicians who treated this patient.</td>
</tr>
<tr>
<td>G</td>
<td>Show Specialized Question Groups: Use this link to view the group(s) assigned to this patient.</td>
</tr>
<tr>
<td>H</td>
<td>Greeting: These are key words you can use to begin your patient call.</td>
</tr>
<tr>
<td>I</td>
<td>Questionnaire: These are the questions to be asked of the patient. Use the buttons and/or fields provided to record the patient's answers.</td>
</tr>
<tr>
<td>J</td>
<td>Closing Remarks: Greeting: These are key words you can use to begin your patient call.</td>
</tr>
<tr>
<td>K</td>
<td>Escalate Call: If the patient call needs to be escalated to another group for further action, use this button to send that request to the group.</td>
</tr>
<tr>
<td>L</td>
<td>Close: When closing out the call record, click this button to assign a call status to this record.</td>
</tr>
<tr>
<td>M</td>
<td>Previous Patient Surveys: If the patient call record is a &quot;serial survey&quot;, this will display the previous calls completed in that particular series of calls.</td>
</tr>
<tr>
<td>N</td>
<td>Patient Call History: This will display a log of the previous call attempts for this call record.</td>
</tr>
</tbody>
</table>
4.3: Completing a Patient Call Questionnaire

- When you are able to reach the patient by phone, use the questionnaire provided to ask the designated questions.

- The questions may be set up as a “point-and-click” answer type with a pre-determined scale you can select from or a general text box to free text
  - “Point-and-Click” Questions
    - These questions may be a single choice, multiple choice, or numerical rating scale. Pick the best answer(s)
    - An “Add Note” button is located on the right-hand side of the screen for each of these questions. If you need to document additional comments, click this button and a text box will appear. When done with the text box, click “Close”
  - Text Box
    - These questions are designed to be a free-text area to document the patient comment, questions, and/or concerns.

- For “Reward and Recognition” and “Opportunity for Improvement” questions, you will see a link that says “Send Reward/Recognition Email” or “Send Opportunity to Improve Email.” Once selected, a new pop-up window will display.
<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A</strong></td>
<td>Reward/Recognition or Opportunity to improve question text</td>
<td><strong>E</strong></td>
</tr>
<tr>
<td><strong>B</strong></td>
<td>Text box to document patient comments</td>
<td><strong>F</strong></td>
</tr>
<tr>
<td><strong>C</strong></td>
<td>Select Department: This is where callers determine what department to email the comment. OR Select Unit: This is where callers determine which Unit to email the comment.</td>
<td><strong>G</strong></td>
</tr>
<tr>
<td><strong>D</strong></td>
<td>If the caller knows name of employee, type it here</td>
<td><strong>H</strong></td>
</tr>
</tbody>
</table>
4.4: Closing the Call

• Click “Close” located on the bottom right-hand side of the call survey screen.

• You will then see a popup window where you must indicate the current call status. Choose from Busy, Completed, Do Not Call, Left Message, No Answer, Removed, Rescheduled, or Wrong Number.
  
  o If the survey was completed (at least one question answered), choose “Completed”; if the call was not able to be completed, use the menu and field provided to indicate the reason.

• Click “Save” when you are finished.

• When you have closed the survey, you will return to the Patient Call List.
  NOTE: If you marked the call as “Complete”, the patient call record will not display on the Patient Call List.

4.5: Escalate Call

• If any comments or questions provided by the patient (such as an unexpected outcome) warrant a follow-up call or any additional action, click “Escalate Call” which is located on the bottom right-hand side of the patient call survey screen.

• The popup window will allow you to indicate which group(s) should follow up on this call. Click the appropriate checkbox, then click “Send” when you are finished.

• If you are not escalating the call, click “Close” to exit out of this screen.
Section Five: Addendum

5.1: Overview

- The "Addendum" feature searches for patients on the Active list, Dropped List, completed call records, and removed call records.
  
  o Completed Call Records: You are able to view the post-visit call questionnaire, append the call record, or create a new call record
  o Removed Call Record: You are able to reactivate the patient, and place them onto the Patient Call List
  o Active List or Dropped List Call Record: You are able to initiate a phone call.

- This feature is available by choosing Addendum from the “Select Calls Type” dropdown at the top left of the patient call list:

5.2: Record Search

- Choose “Addendum” from the Select Calls Type dropdown at the top left of the patient call list.

- Using the search fields available, search for patient by:
  
  o First Name
  o Last Name
  o Phone Number
  o MRN (medical record number)
  o Visit Number

- The search results will display in a pop-up window.

- Once you identify the desired patient, click on the Medical Record Number link.
5.3: Search Result Legend

<table>
<thead>
<tr>
<th>Call Status</th>
<th>Legend</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Tile</td>
<td>Patient Call Record is currently on the “Active” call list</td>
<td></td>
</tr>
<tr>
<td>Maroon Tile</td>
<td>Patient call record is currently on the “Dropped” call list</td>
<td></td>
</tr>
<tr>
<td>Orange Tile</td>
<td>Patient call record is rescheduled for a future date by using the call status “Rescheduled” and notating a new scheduled call date</td>
<td></td>
</tr>
<tr>
<td>Green Tile</td>
<td>Completed patient call record</td>
<td></td>
</tr>
<tr>
<td>Grey Tile</td>
<td>Patient call record is currently in progress</td>
<td></td>
</tr>
<tr>
<td>Brown Tile</td>
<td>Patient call record is “Removed” from the Patient Call List by using the call status “Removed”</td>
<td></td>
</tr>
</tbody>
</table>

5.4: How to View a Completed Survey

- Once you have searched for the patient in the Addendum dropdown, the patient tiles will display.
- If the patient has multiple surveys in the system, you will see separate line entries for each one. They will be numbered under the Survey Number column: 1, 2, 1-1, 1-2, etc.

Click the “+” sign to expand the patient tile then click on the View icon. The survey will then open for viewing:
• A pop-up window will display, and you will see the completed call record.

• You may choose to export the file or print the file by using the icons located on the top right-hand corner of the window.

• To close the call record, click the "X" mark located at the top right-hand corner of the pop-up window.
5.5: Append a Completed Survey or Create a New Survey

- Once you have searched for the patient in the Addendum tab, the patient tiles will appear.
- In the green patient tile, click the “Append” link or the “New” icons

When you click New:
- A new call record will appear, with the original post-visit call questions
- Once done with the call, click the “Close” button on the button right-hand corner of the screen.
- Please the call into a call status, such as “Completed”

When you click Append:
- A new call record will open, and will display the previously answered questions and notes documented.
- You will be able to edit the answers and questions directly from this screen.
- Once done appending the record, click the “Close” button on the button right-hand corner of the screen.
- Please the call into a call status, such as “Completed”

Note: If you place a patient into the “Busy”, “No Answer”, “Left Message”, or “Rescheduled” (for same day call) statuses, the appended patient record will display on the Active call list so you may complete the call at a later time. If a call is rescheduled for the next day or farther out the call will be available via the Serial Calls Type ‘Search’ dropdown.
Section Six: Logging Out

- When you are finished making calls in Patient Call Manager, click the “Logout” button on the top navigation bar before leaving the computer.

- The web browser will close. This ensures that the next caller can easily log into the system, and protects the patient information located in this system.