

# PsychConsult<sup>®</sup> Provider Caseload Manager

PsychConsult's Caseload Manager is a single point of access for clinicians to effectively manage their daily activities. With direct navigation to critical areas of the application, Caseload Manager provides an intuitive and comprehensive tool that will increase productivity.

## My Schedule

- ▶ View scheduled clinical appointments and administrative activities for a single day or a date range.
- ▶ Provides quick links to treatment plans, documents, and medication information for each scheduled consumer.

## My Caseload

- ▶ Organizes and displays the clinician's caseload for all clinical programs.
- ▶ Displays key data for each consumer, including age, diagnosis, number of days since last seen, and primary clinician.

- ▶ Provides quick access to clinical program assignments and treatment team details.
- ▶ Assign temporary coverage and security permissions to staff members.
- ▶ Sort and filter caseload by multiple criteria.

## My To Do

- ▶ Consolidates a complete listing of all clinical documents to complete, sign and co-sign.
- ▶ Notifies clinician of assigned treatment plan-related tasks, including plans to review, plans to sign, and plans to co-sign.
- ▶ Provides a detailed breakdown of tasks, including phone calls, follow-ups, and more.

My Caseload for Green, Tracy M.S.W. Printed On: 07/28/2015 09:52:53											
Patient ID	Patient Name	Age	Home Phone	DX	Service ID	Program ID	Protocol ID	Last	My Last	Primary Clinician	Covering Clinician
00000198	Anderson, Laura	19	(210) 547-9020	F32.2	MH	ADOLESCENT	IP			Green, Tracy	
00000203	Brooks, Melanie	48	(301) 775-5635		MH	ADULT	OP	8	8	Green, Tracy	
00000001	Conway, Karen	33	(610) 892-3156	F32.1	MH	ADULT	OP	6	6	Green, Tracy	
00000004	Elders, Pam	42	(920) 765-8888	F11.10	SA	ADULT	OP	15	15	Green, Tracy	
00000031	Ella, Pam	49	(309) 214-5656		MH	ADULT	OP	13	13	Green, Tracy	
00000072	Flowers, Shelley	65	(628) 675-1890		MH	ADULT	OP	0	0	Green, Tracy	
00000204	Freemont, Alex	55	(804) 787-3030	F70	MR/ID	ADULT	OP	1	1	Green, Tracy	
00000069	Holzman, Bruno	17	(979) 242-6531	F06.4	MH	ADOLESCENT	OP	11	11	Green, Tracy	
00000120	Jackson, Kerry	55	(412) 361-5426		MH	ADULT	OP	0	0	Green, Tracy	Taylor, Robert
00000120	Jackson, Kerry	55	(412) 361-5426		MH	CRISIS	CRISIS	0	0	Green, Tracy	Taylor, Robert
00000108	Jefferson, Maria	16	(239) 887-7737		MH	ADOLESCENT	OP	19	19	Green, Tracy	
00000003	Kahan, Clarence	30	(920) 346-9090	SA	ADULT	OP	OP	7	7	Green, Tracy	
00000162	Martinelli, Cindi	41	(717) 236-7788	F30.2	MH	ADULT	ACT	5	5	Green, Tracy	Taylor, Robert
00000165	Martinez, Ricky	20	(570) 383-7346		MH	ADOLESCENT	OP	12	12	Green, Tracy	
00000007	Pitale, Thomas	39	(412) 321-9090	F25.9	MH	ADULT	OP	21	21	Green, Tracy	
00000002	Pitale, Thomas	39	(412) 321-9090	F25.9	MH	ADULT	CASE	21	21	Green, Tracy	
00000009	Quinn, Lester	60	(707) 343-2809	F10.20	SA	ADULT	OP	8	8	Green, Tracy	
00000009	Quinn, Lester	60	(707) 343-2809	F32.1	MH	ADULT	OP	8	8	Green, Tracy	
00000202	Raines, Mary	48	(412) 781-8978		MH	ADULT	OP	5	5	Green, Tracy	
00000007	Randolph, Lindsey	18	(708) 564-8767	F50.00	MH	CHILD	OP			Green, Tracy	
00000008	Seidel, Napoleon	55	(717) 543-8732	F34.1	MH	ADULT	OP	14	14	Green, Tracy	
00000010	Sides, Norman	89	(801) 675-0987	F02.81	MH	ADULT	OP	6	6	Green, Tracy	
00000151	Smithton, Gerard	14	(412) 521-2096		MH	ADOLESCENT	OP	1	1	Green, Tracy	
00000151	Smithton, Gerard	14	(412) 521-2096	F33.9	MH	ADOLESCENT	DAY	1	1	Green, Tracy	
00000207	Sutter, Mary	30	(412) 578-2347	F32.2	MH	CRISIS	CRISIS	0	0	Green, Tracy	
00000164	Troutman, William	44	(212) 293-8474		MH	ADULT	ACT	4	4	Green, Tracy	

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## My Staff

- ▶ View and manage your staff's activities.
- ▶ Includes productivity and compliance reporting.

## My Test Results

- ▶ Displays test results, including lab, radiology, and other images, and provides the capability for reviewing and signing.

## My Clinical Alerts

- ▶ Lists consumers who meet the criteria for organizationally defined clinical alerts.
- ▶ Allows clinicians to review, acknowledge and take the appropriate course of action based on the alert.

The screenshot displays the 'My Clinical Alerts' section for Silver, Antonio M.D. The interface includes a navigation bar with tabs for 'My Schedule', 'My Caseload', 'My To-Do', 'My Staff', 'My Lab Results', and 'My Clinical Alerts'. The main content area shows a table of clinical alerts with columns for 'Reviewed', 'ID', 'Name', 'Episode', 'Rule Short Name', and 'Rule Description'. Two alerts are listed for ID 00000173, both for Jackson, Robert W, Episode 001. The first alert is for 'Auto CDS #1' and the second for 'Auto CDS #3'. A 'Review Clinical Alert' dialog box is open, showing details for the selected alert: ID: 00000173, Name: Jackson, Robert W, Episode ID: 001, and Notified On: 02/04/2014 10:15 AM. The alert text reads: 'Conditions suggest monitoring White Blood Cell count. Recommend continued CBC tests. (Automated Clinical Decision Support Rule #3)'. The dialog box also includes fields for 'Reviewed By', 'Reviewed On', a 'Response' dropdown menu (currently set to 'Ordered Appropriate Test(s)'), and a 'Comments' text area. 'Save' and 'Cancel' buttons are at the bottom of the dialog.

Reviewed	ID	Name	Episode	Rule Short Name	Rule Description
<input type="checkbox"/>	00000173	Jackson, Robert W	001	Auto CDS #1	Conditions suggest monitoring Lithium levels. Recommend CBC tests that specifically identify Lithium level. (Automated Clinical Decision Support Rule #3)
<input type="checkbox"/>	00000173	Jackson, Robert W	001	Auto CDS #3	Conditions suggest monitoring White Blood Cell count. Recommend continued CBC tests. (Automated Clinical Decision Support Rule #3)