## Post Discharge Call

This tip sheet is for nurses to properly identify recently discharged patients that may require follow-up and properly note post-discharge follow-up or exclusion documentation in telephone encounters.

# Identify discharged patients requiring follow up or additional documentation

The following report looks at all patients that were admitted within the last 3 months, and discharged within the last 14 days with any of the ADT patient class at discharge from the list in addendum.

## **Post Discharge Report**

1. Open "My Reports" activity tab, search in the "Library" for "PHS PCMH Post Discharge Follow Up" report.

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2	
My Reports	PHS Find Patients - Generic Criteria
	V Matching reports
	PHS PCMH Post Discharge Follow Up This is a PCMH report that looks at all patients that were admitted within the last 3 months, and
Library	
PHS PCMH Po	> Additional reports

#### 2. Click Run to execute report.

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PHS PCMH Post Discharge Follow Up [13942554] as of Fri 10/13/2017 10:28 AM ? Resize 🗢 Clos											e X
🛊 Filters 💯 Options 🗸 🔂 Chart 🔆 Encounter 🗸 🔞 Bulk Orders 😹 Communication 🗸 🐨 Track Pt Outreach 🛱 HM Modifiers 🛛 🔀 Bulk PCP 🔸 🛛 Mi											e 🗸
	_		-	1	0, -				-		
Detail Call C	Complete Visit	Scheduled									l Pa
ID (both)	<sup>3</sup> Patient Name	DOB	Age	Sex	PCP ^2	Next PCP Visit	Last PCP visit	ED Discharge ট Last IP Discharge Date	Discharge Unit	DC Call (	Cc DC
			57 y.o.	F		11/03/2017	07/13/2016	10/09/2017	MGH ELLISON19	×	×
									THOR\MED	· · ·	~
4353000			31 y.o.	F			02/09/2017	10/12/2017	MGH BLAKE 13	×	×
									OB	· · ·	· ~
			68 y.o.	F		08/15/2018	08/09/2017		NSP UCC	×	_ <b>x</b>
									DANVERS	~	<u> </u>
103332174			73 y.o.	M		12/18/2017	03/13/2017	10/15/2015	BWH UCC FXB	×	×
										<u>^</u>	<u> </u>

The report displays a red X mark if patients did not receive a post discharge follow-up call/visit after the most recent discharge date. Any post discharge exclusion reason documented in the chart is also shown.

### **Document post-discharge telephone encounters**

- 1. Select the patient in the report results and create a "Telephone Encounter" for patients:
  - a. that did not receive a follow up call/visit and that are required to be followed up on (no exclusion reason(s) appears in the report)
  - b. that did not receive a follow up call/visit, are not required to be followed up on and have no exclusion reason documented for the call/visit
- 2. Document the "Contacts" and "Documentation" sections in the "Telephone" activity

elephone												?	Re
ELEPHONE/REFILL ENCOUNTER CO	ontacts Reason	for Call	Medications	Allergies	BestPra	ctice Verif	y Rx Benefits	Problem List	Documentation	MyChart Msg	Comm Mgt		
outing													
Contacts													
										a			
Incoming Call Outg	oing Call 🛉 Othe	r							de la	Show: Permane	nt Comments	My Quick Bu	ttons
Telephone (Outgo	ing)												
	10:09 AM ()	10/13/201	7 🛱 Now										
Туре: 🗸	Telephone (Out	going)											
Relationship:		ç	)										
			Pharmacy:			Q							
Contact name:	θ												
Phone:													
Outcome:		ç	No Answer	Busy Left	Message	Not Available	Missing or Inva	lid Number					
Contact comments:													
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3. Select the Post Discharge Activity to document the Post Discharge Assessment.

	Post Discharge		? Actions - Resize +
	Medications	Post D/C Phone Call Pt Outreach	<b>—</b> 🖉
Telephone			
Patient Instruc	Medications	Post Discharge Assessment	
		Post Discharge Phone Call	
		No data filed	
Post Discharge		Track Pt Outreach	
Health Mainte		None	
Communicati			

4. **Fill out** the "Post discharge exclusion documentation" section, if the patient does not qualify for either a call and/or a follow up visit.

Post D/C Phone Ca	Pt Outreach				l
Post Discha	irge Assessment				†+
✓ Post dis <sup>™</sup>	charge exclusion documentation				
Rea	son(s) patient does not require f/u call				
	Follow-up appointment within 2 business days	Patient/caregiver	r refused		
	Patient deceased	Followed by differen	nt specialty		
	Called by different care team member	Per provide	er		
	Per office guidelines				
Rea	son(s) patient does not require f/u visit   Post discharge phone call sufficient   Followed by different specialty	Patient/caregiver refused Per provider	Patient dec Per office gu	eased	

Notably, if you indicated the patient does not require any type of follow up, then no additional sections are needed to be documented in the "Post Discharge Navigator".

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5. If you indicated the patient requires any follow up, document any other applicable sections in the navigator.

Notably, there are two sections in the navigator that drive the report columns "DC Call Complete" And "DC Visit Scheduled".

• Follow-up appointment with PCP/Specialist: click on "Yes" if the appointment was scheduled and appointment information was reviewed with the patient. This will make the patient appear with a green checkmark in the report. The report will display a red X mark if the question "Review date/time/location of follow-up appointment with PCP/specialist" is not answered or if the answer is "No".

∼ Rev	view AVS and Discharge Summary for discharge instructions, follow-up appointments and follow-up tests
	Do you feel you are able to carry out your discharge instructions?
	Review date/time/location of follow-up appointment with PCP/specialist Dres No from discharge instructions

• **Follow-up call:** check the "Post Discharge Call Complete" box only if the call was placed. This will ensure that patient is marked with a green check mark in the report for "DC Call Complete".

Follow Up Needed:	
VNA	
PT	
PCP	
Other	
Summary of issues:	
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Classific Program	
	_
Post Discharge Call Complete? V Mark if completed	

## Addendum

Included in report: patients discharged with and ADT patient class of Inpatient, Emergency, Observation, Newborn, Surgery Admit, SNF, Hospice, ED Observation, LTAC, Psych Inpatient, Urgent Care, Partial Hospitalization or Residential.

**NOT included in report:** patients discharged with an ADT patient class of Hospital Outpatient, Post Procedure Recovery or Day Surgery.