

MEDITECH Expanse TIP SHEET

Case Management Outpatient in a Bed



The Outpatient in a Bed surveillance flag will bring visibility to patients who have an admission status of REG SDC and have an active admission order for outpatient that is 12 hours old or greater. This flag will be added to the Case Management status board and will be added to the 'Hospital Observation Patients' More List.

The screenshot shows the 'Case Manager Template' interface. A dropdown menu is open under the 'More Lists' button (circled in red with a '1'). The menu items include 'Any ED Location', 'Recently Accessed', 'Readmissions w/30 days of discharge', 'Hospital Discharge Equip/Supplies', 'Hospital CM Consults', 'Hospital SW Consult', 'Hospital Observation Patients' (circled in red with a '2'), and 'ITSS Positive Risk'. The main table below shows patient records with columns for Name with Account Flag, Location, Age BirthSex, Reg/Status, Type, Primary Insurance, Attending Provider, Reason For Visit, Anticipated DC Date, Return to Prior/DCP, DC Order, and CM Cons... (with sub-options like SW Cons..., OBS/Tra..., DME/CA...).

The 'OP in a Bed' profile will display on the main Case Management Status Board. Alternatively, the surveillance flags will also be available on the current 'Hospital Observation Patients' status boards located under the More Lists tab.

The screenshot shows the 'Case Manager Template' interface with the 'Hospital Observ...' list selected (circled in red with a '3'). The main table displays patient records. The first record is 'TEST,SURGERYPLUS1' (52 M, H.210-22, H2925, ADM IVO) with Type 'Observati...' and Reason For Visit 'TEST'. The second record is 'Surveillance,Test13' (71 M, H.210-36, H2992, REG SDC) with Type 'Surgical...' and Reason For Visit 'Abdominal aortic ane...'. The third record is 'Surveillance,Test1' (69 M, H.210-38, H3069, ADM IVO) with Type 'Observati...' and Reason For Visit 'Abnormal EKG'. The 'CM Cons...' column for the second record shows 'OP in Bed' (circled in red).

The status board will populate with patients who have a registered account as REG SDC, with an active admission order for outpatient services that is 12 hours old or greater.



The screenshot shows a 'Case Manager Template' interface with a search bar and a list of patients. The third patient in the list is highlighted with a red box. This patient's name is 'Surveillance, Test13'. The details for this patient are: TEST NO... 71 M, H.210-36 H2992, REG SDC. The surveillance criteria are 'Surgical ... AETNA BETTER HLTH ... Hospitalist01,Provider Abdominal aortic ane...' and '05/02/25... SYSTEM ASSIGNED C... Hospitalist01,Provider INFORMATION NOT A...'. A red box highlights a 'Surveillance' alert with the criteria 'CM - Outpatient in a bed: 05/02/25 15:03'. The alert includes buttons for 'SW Cons...', 'OP in Bed', 'SW Specimen', and 'OBS Pati...'.

Selecting on the “OP in Bed” surveillance alert will pop-up an additional box showing the date/time the patient qualified for the Outpatient in a Bed alert. Selecting on the date/time hyperlink will open the Surveillance Profile Criteria overlay.

The screenshot shows the 'Surveillance Profile Criteria' overlay. The title bar includes 'Surveillance, Test13 71 M 05/31/1954 Allergy/Adv: No Known Allergies' and a 'Close' button. The main content area has a table with the following data:

Profile Qualified	Instance
CM - Outpatient in a bed 05/02/25 15:03	1

Below the table are several sections:

- Details:** REG SDC patient with an active admission order for outpatient that is 12 hours old or greater. This profile excludes patients admitted to Behavioral Health services.
- Associated Data:** (Empty section)
- No actions available for CM - Outpatient in a bed.**
- Qualifying Criteria:** (Empty section)

At the bottom of the overlay are three buttons: 'Add To Profile', 'Remove From Profile', and 'Edit Reevaluate Time'.

The Surveillance Profile Criteria overlay shows additional details for the Outpatient in a Bed profile including historical qualifying information on the patient.

Patients will be removed from the profile when their registration status changes or upon discharge.

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Consult Case Management Specialty Services and Consult Social Work Specialty Services



The 'CM Specialty' and 'SW Specialty' surveillance flags will bring visibility to patients who have an active order for 'Consult to Case Management Specialty' and 'Consult to Social Work Specialty' at hospitals who have a dedicated case manager and/or social worker for a service line. These flags will be added to the Case Management status board and as an individual 'more list' status board.

The screenshot shows the 'Case Manager Template' interface. The 'More Lists' dropdown menu is open, and 'Specialty Orders' is highlighted. The main table lists several patients with surveillance flags. The 'Specialty Orders' dropdown menu includes options like 'Readmissions w/30 days of discharge', 'Hospital Discharge Equip/Supplies', 'Hospital CM Consults', 'Hospital SW Consult', 'Hospital Observation Patients', 'ITSS Positive Risk', and 'Specialty Orders'.

The 'CM Specialty' and 'SW Specialty' profiles will display a flag on the main Case Management Status Board.

Per local facility decision, this profile may also be available as a 'More List' option.

Navigate to the Patient Care Status Board and select on the 'More Lists' tab (1) then choose 'Specialty Orders' from the list (2).

The screenshot shows the 'Case Manager Template' interface with the 'Specialty Orders' status board selected. The table displays patient information, including name, location, age, birth sex, type, primary insurance, attending provider, reason for visit, anticipated DC date, return to prior/DCP, DC order, and specialty flags. The flags include 'CM Cons...', 'SW Cons...', 'CM Speci...', 'SW Speci...', 'ITSS+', 'SW Cons...', 'OP in Bed', 'CM Speci...', 'SW Speci...', and 'OBS Pati...'.

The status board will populate with patients who have an order for 'Consult to CM Specialty' and/or 'Consult to SW Specialty'.



Case Manager Template											
HCA FL North Florida Hosp											
Find Patient											
My List 0											
Any Location											
Hospital CM Co...											
Open Han... Open Patient Sum... Add to My... Replace My...											
Name with Account Flag	Location	Age BirthSex	Type	Primary Insurance	Attending Provider	Reason For Visit	Anticipated DC Date	Return to Priority/DCP	DC Order	CM Cons...	
Room - B... Account Number	Reg Date...	Secondary Insurance	PCP	Reason For Visit	Admit Source	Anticipated DC Date	Discharge Date/Time	Discharge Disposition	CM Cons...	SW Cons...	
Reg/Status	LOS									DME/CA...	
<input type="checkbox"/>	Test, Tammy	TEST NO... 49 F H.101-01 H647 ADM IN	Inpatient	MEDICARE AB	Mt,Meditech	TESTING	09/10/24...	SYSTEM ASSIGNED C... 267		NON HEALTHCARE FA...	CM Cons...
<input type="checkbox"/>	Surveillance, Test5	TEST NO... 66 M H.101-02 H1007 ADM IN	Inpatient	MEDICARE AB	Hospitalist01, Provider	TEST	09/27/24...	SYSTEM ASSIGNED C... 250		CLINIC OR PHYS OFF... Home with IOP	CM Edit SW Edit... ITSS+
<input type="checkbox"/>	Surveillance, Test7	TEST NO... 71 M H.101-04 H931 ADM IN	Inpatient	MEDICARE AB	Hospitalist01, Provider	test	09/23/24...	SYSTEM ASSIGNED C... 254		Hospitalist01, Provider CLINIC OR PHYS OFF...	CM Cons...
<input type="checkbox"/>	surveillance, Fedroski	TEST NO... 44 F H.101-09 H728 ADM IN	Inpatient	SYSTEM ASSIGNED C...	Hospitalist01, Provider	Abdominal aortic ane...	09/11/24...			CLINIC OR PHYS OFF...	CM Cons...

Selecting on the “CM Specialty” surveillance alert will pop-up an additional box showing the date/time the patient qualified for the CM Specialty alert. Selecting on the date/time hyperlink will open the Surveillance Profile Criteria overlay.

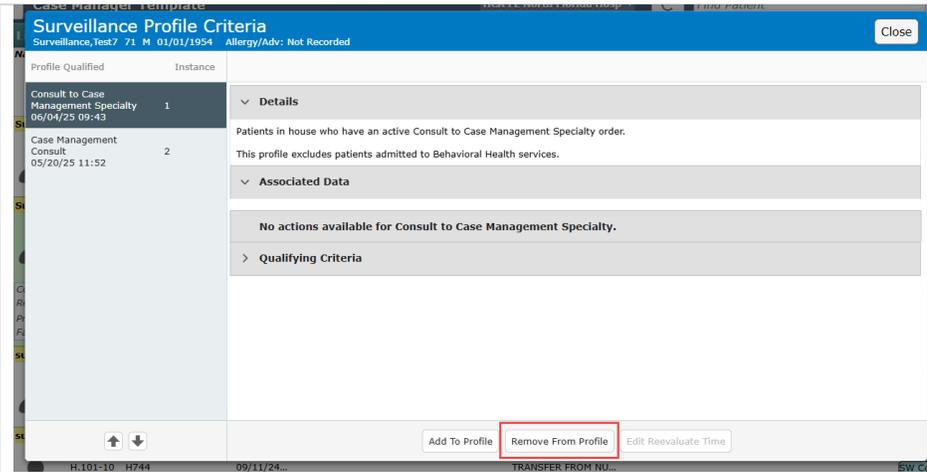
This process will work the same way for the ‘SW Specialty’ flag.

Surveillance Profile Criteria		Surveillance, Test7 71 M 01/01/1954 Allergy/Adv: Not Recorded		Close
Profile Qualified	Instance			
Consult to Case Management Specialty 06/04/25 09:43	1	<p>Details</p> <p>Patients in house who have an active Consult to Case Management Specialty order. This profile excludes patients admitted to Behavioral Health services.</p> <p>Associated Data</p> <p>No actions available for Consult to Case Management Specialty.</p> <p>Qualifying Criteria</p>		
Case Management Consult 05/20/25 11:52	2			
		<p>↑ ↓</p> <p>Add To Profile Remove From Profile Edit Reevaluate Time</p>		

The Surveillance Profile Criteria overlay shows additional details for the “Consult to CM Specialty” profile.

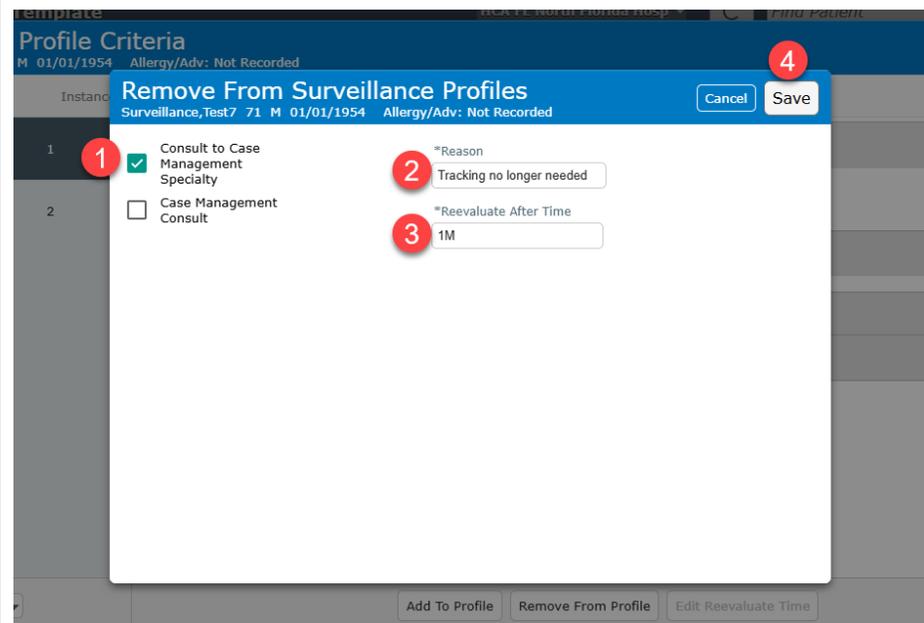
This process will work the same way for the ‘SW Specialty’ flag.





Patients should be added to the specialty Case Manager or Social Workers 'My List' and then manually removed from the profile through the manual removal process once the order has been addressed.

To manually remove the patient, within the Surveillance Profile Criteria overlay, select the 'Remove From Profile' button.



1. Select which profile you would like to remove the patient from.
2. The reason field will default 'Tracking no longer needed'.
3. Enter '1M' for the Reevaluate After Time.
4. Select Save.

This process will be the same for the "Consult to SW Specialty" profile.

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Case Management Order Edit Notification and Social Work Order Edit Notification



The 'CM Edit' and 'SW Edit' surveillance flags will bring visibility to patients who have had an edit done to their active Consult to Case Management order or to their Consult to Social Services order. These flags will be added to the Case Management status board and will be added to the 'Hospital CM Consults' and 'Hospital SW Consults' More Lists.

The 'CM Edit' and 'SW Edit' profiles will display a flag on the main Case Management Status Board. Alternatively, the surveillance flags will also be available on the current 'Hospital CM Consults' or the 'Hospital SW Consults' status boards located under the More Lists tab.

The status board will populate with patients who have had an edit done to their 'Consult to Case Management' or 'Consult to Social Services' work.



Case Manager Template

HCA FL North Florida Hosp

Find Patient

My List 0 Any Location Hospital CM Consults 12

Open Hand Off Open Patient Summary Add to My List Replace My List

Name with Account Flag	Location Room - Bed Reg/Status	Age BirthSex Account Number	Type Reg Date/TI... LOS	Primary Insurance Secondary Insurance	Attending Provider PCP	Reason For Visit Admit Source	Anticipated DC Date * Discharge Date/Time Discharge Disposition	Return to Prior/DCP	DC Order	CM Consults SW Consults OBS/Traum... DME/CAGE...
Training,Nipa										
TEST NORT... 35 F	H.210-03 ADM IN	H272	Inpatient 07/30/24 12... 309	TRICARE WEST	Hospitalist01,Provider	Chest pain				CM Consult SW Consult
Surveillance,Test11										
TEST NORT... 31 F	H.210-07 ADM IN	H1473	Inpatient 11/07/24 15... 209	SYSTEM ASSIGNED CODE	Hospitalist01,Provider	Labor CLINIC OR PHYS OFFICE R...				CM Consult ITSS
Confidential Resuscitation Sta... Preferred Langua... Family Support	Resus Status Not Ordered No Hx Avail		30 Day Re-Admit LOS Hrs including Home services ne...	No 5021			CM/SW Orders	05/29/25 12:15 Consult to Case Management Routine		
surveillance,Jess										
TEST NORT... 37 M	H.210-08 ADM IN	H736	Inpatient 09/11/24 15... 266	SYSTEM ASSIGNED CODE	Hospitalist01,Provider	Abdominal aortic aneurysm CLINIC OR PHYS OFFICE R...				CM Consult SW Specialty CAGE, ITSS

For more detailed information about the edited consult order, click on the down caret (1) to open the details section of the patient's profile. The current CM/SW orders will be shown. The orders (2) are actionable. Click on the order to open an overlay.

Then click on the  (3) which will open another overlay showing the full order details.

Orders All by Procedure - Consult to Case Management

Surveillance,Test11 31 F 04/25/1994 Allergy/Adv: Not Recorded

Close

Go To Current Orders

ORDER	STATUS	ORDER START	EXPECTED	OVERDUE	ORDER DETAIL
Consult to Case Management Routine	Ordered	05/29/25 12:15			 

View Order Detail

Surveillance,Test11 31 F 04/25/1994 Allergy/Adv: Not Recorded

Close

ORDER DETAIL

AUDIT LOG

Label Requisition

Order	Consult to Case Management Routine	Ordering User	Johnson,Kayla
Order Set	CM Edit Notice	Ordering Device	No Response
Ordering Provider	Hospitalist01,Provider	Verifying User	Johnson,Kayla
Order Location	TEST NORTH FLORIDA	Verifying Device	No Response
Source	Written	Category	Consultations
Order	05/29/25 12:13	Order Number	250529-121423983
Start	05/29/25 12:15	Internal Order Number	H1-B20250529121423983
Status	Ordered		

Reason for consult: Advance directives

Case management consult comment: edit 12:47

Reflex Edit Notification: Yes-2

Case Manager Template

HCA FL North Florida Hosp Find Patient

My List: 0 Any Location Hospital CM Co... 13 Open Han... Open Patient Su... Add to My ... Replace My ...

Name with Account Flag	Location	Age BirthSex	Type	Primary Insurance	Attending Provider	Reason For Visit	Anticipated DC Date	Return to Prior/DCP	DC Order	CM Cons...
Room - ...	Account Number	Reg/Stat...	LOS	Secondary Insurance	PCP	Admit Source	*Discharge Date/Ti...	Discharge Disposition	OBS/Tr...	DME/CA...
Surveillance,Test5										
TEST NO... 66 M			Inpatient	MEDICARE AB	Hospitalist01,Provider TEST					CM Edit
H.101-02 H1007			250	09/27/24... SYSTEM ASSIGNED ...	CLINIC OR PHYS OF...					CM Order Edit Notification: 05/29/25 10:54
ADM IN										
Home with IOP										
Surveillance,Test7										
TEST NO... 71 M			Inpatient	MEDICARE AB	Hospitalist01,Provider test					CM Cons...
H.101-04 H931			254	09/23/24... SYSTEM ASSIGNED ...	Hospitalist01,Provider CLINIC OR PHYS OF...					
ADM IN										
Surveillance,Rose										
TEST NO... 76 M			Inpatient	SYSTEM ASSIGNED ...	Hospitalist01,Provider Abdominal aortic an...					CM Cons...
H.101-10 H744			266	09/11/24...	TRANSFER FROM NU...					SW Cons...
ADM IN										ITSS+
TEST,TIM										

Patients will be removed from the profile through the manual removal process. Once the edited order has been acknowledged and addressed, patients should be manually removed from the profile in order to allow the system to monitor for any additional edits. Leaving these on the status board will prevent you from receiving any subsequent notification of edits to the order.

To manually remove the patient from the profile, select on the “CM Edit” surveillance alert to display an additional box showing the date/time the patient qualified for the CM Edit alert. Selecting on the date/time hyperlink will open the Surveillance Profile Criteria overlay (1).

Within the Surveillance Profile Criteria overlay, select the ‘Remove From Profile’ button (2).

3. Select which profile you would like to remove the patient from.
4. The reason field will default ‘Tracking no longer needed’.
5. Enter ‘1M’ for the Reevaluate After Time.
6. Select Save.

Surveillance Profile Criteria

Surveillance,Test5 66 M 01/01/1959 Allergy/Adv: No Known Allergies

Profile Qualified Instance

CM Order Edit Notification 05/29/25 10:54 2

Details

Patient has an edited case management consult order. Refer to the patient's case management consult orders for more information.

This profile excludes patients admitted to Behavioral Health services.

Associated Data

No actions available for CM Order Edit Notification.

Qualifying Criteria

Add To Profile Remove From Profile Edit Reevaluate Time

Surveillance Profile Criteria

Surveillance,Test5 66 M 01/01/1959 Allergy/Adv: No Known Allergies

Remove From Surveillance Profiles

Cancel Save

CM Order Edit Notification 05/29/25 10:54 2

Reason

Tracking no longer needed

Reevaluate After Time

1M

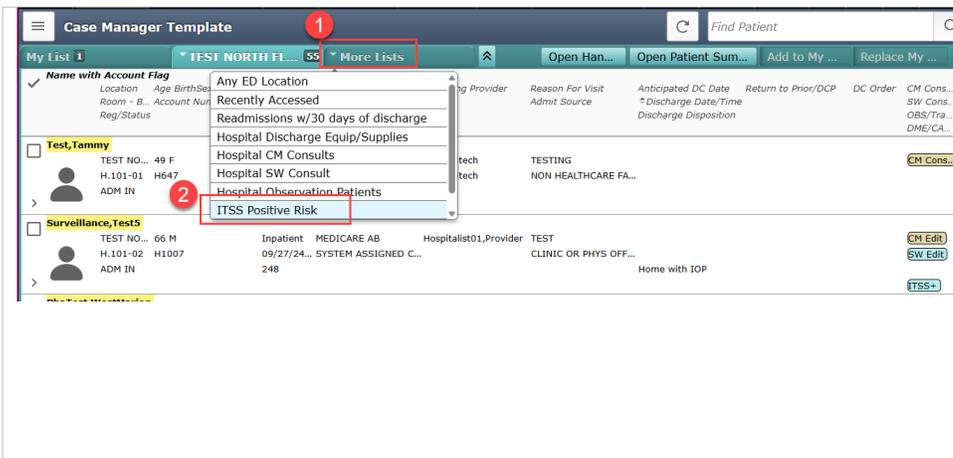
Add To Profile Remove From Profile Edit Reevaluate Time

MEDITECH Expanse TIP SHEET

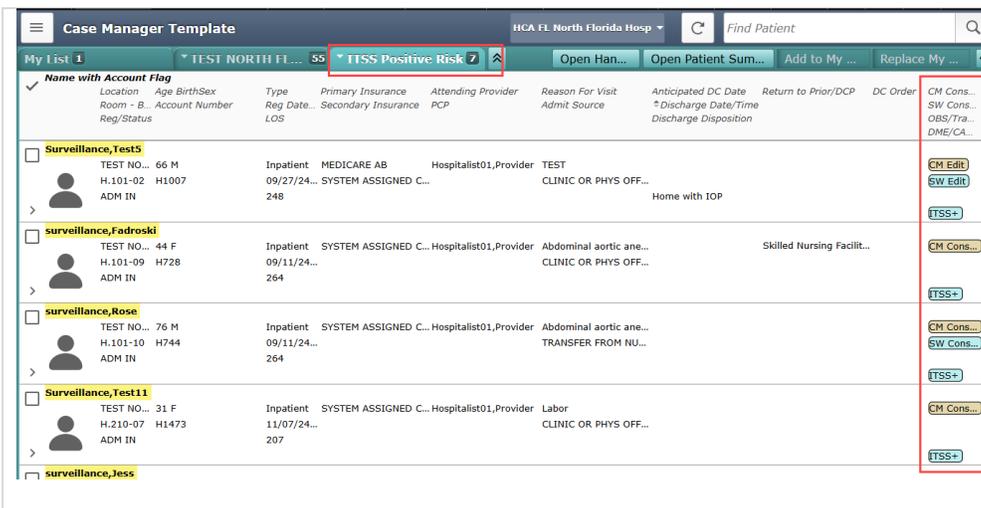
Addition of ITSS Positive Risk Surveillance Profile to the Case Manager Status Board and More List option.



The ITSS Positive surveillance flag will bring visibility to trauma patients with positive ITSS screening via nursing documentation. This flag will be added to the Case Management status board and has the option as an individual 'more list' status board.



The 'ITSS+' profile will display a flag on the main Case Management Status Board. Per local facility decision, this profile may also be available as a 'More List' option. Navigate to the Patient Care Status Board and select on the 'More Lists' tab (1) then choose 'ITSS Positive Risk' from the list (2).



The status board will populate with patients who have a positive 'Injured Trauma Survivor Screening' (ITSS) with a score of 2 or more completed via nursing documentation.



My List 1 TEST NORTH FL... SS ITSS Positive Risk 7

Name with Account Flag	Location	Age	BirthSex	Type	Primary Insurance	Attending Provider	Reason For Visit	Anticipated DC Date	Return to Prior/DCP	DC Order	CM Cons...	SW Cons...	OBS/Tr...	DME/CA...
Reg Date...	Room - B...	Account Number	Reg/Status	LOS	Secondary Insurance	PCP	Admit Source	*Discharge Date/Time	Discharge Disposition					
Surveillance,Test5	TEST NO...	66 M	H.101-02	H1007	Inpatient	MEDICARE AB	Hospitalist01,Provider	TEST	CLINIC OR PHYS OFF...	Home with IOP	CM Edit	SW Edit		
	ADM IN				248	SYSTEM ASSIGNED C...					ITSS+			
surveillance,Fadroski	TEST NO...	44 F	H.101-09	H728	Inpatient	SYSTEM ASSIGNED C...	Hospitalist01,Provider	Abdominal aortic ane...	CLINIC OR PHYS OFF...	Skilled	ITSS+			
	ADM IN				264						ITSS+			
surveillance,Rose	TEST NO...	76 M	H.101-10	H744	Inpatient	SYSTEM ASSIGNED C...	Hospitalist01,Provider	Abdominal aortic ane...	TRANSFER FROM NU...		CM Cons...	SW Cons...		
	ADM IN				09/11/24...						ITSS+			

Selecting on the “ITSS+” surveillance alert will pop-up an additional box showing the date/time the patient qualified for the ITSS positive alert. Selecting on the date/time hyperlink will open the Surveillance Profile Criteria overlay.

Surveillance Profile Criteria
surveillance,Fadroski 44 F 05/31/1981 Allergy/Adv: No Known Allergies (More) Close

Profile Qualified	Instance
ITSS Positive Risk-CM 03/21/25 16:55	1

Details

Patients in house with a score of 2 or more on the Injured Trauma Survivor Screening via nursing documentation. Case Management to provide appropriate resources based on ITSS screening. Document results in the PAIP note. This profile excludes patients admitted to Behavioral Health services. Patients will be removed from this profile upon manual removal or patient discharge.

Associated Data

Order	Result	Date	Specimen
PTSD Risk	2 - Positive for PTSD Risk	03/21/25 16:52	
Depression Risk	3 - Positive for Depression Risk	03/21/25 16:52	

No actions available for ITSS Positive Risk-CM.

Qualifying Criteria

Add To Profile Remove From Profile Edit Reevaluate Time

The Surveillance Profile Criteria overlay shows additional details for the ITSS Positive Risk profile including historical qualifying information on the patient.

Surveillance Profile Criteria
Surveillance,Test5 66 M 01/01/1959 Allergy/Adv: No Known Allergies Close

Profile Qualified	Instance
ITSS Positive Risk-CM 04/08/25 10:38	1

Details

Patients in house with a score of 2 or more on the Injured Trauma Survivor Screening via nursing documentation. This profile excludes patients admitted to Behavioral Health services. Patients will be removed from this profile upon manual removal or patient discharge.

Associated Data

Order	Result	Date	Specimen
PTSD Risk	4 - Positive for PTSD Risk	04/08/25 10:36	
Depression Risk	5 - Positive for Depression Risk	04/08/25 10:36	

No actions available for ITSS Positive Risk-CM.

Qualifying Criteria

Add To Profile Remove From Profile Edit Reevaluate Time

Click inside the specimen boxes to see additional historical data.

To view more historical data, select inside the ‘specimen’ box.

PTSD Risk

Close

DETAIL HISTORY GRAPH

Documented	Result	Units	Range	Recorded By
04/08/2025 10:36	4 - Positive for PTSD Risk			Fadroski, Jessica R

Click the paper icon to see the patient's full qualifying scores

Add To Profile Remove From Profile Edit Result/Range

Clicking the paper icon will allow user to see the patient's full qualifying scores.

Assessment Viewer

Surveillance, Test5 66 M 01/01/1959 Allergy/Adv: No Known Allergies

Back

DETAIL HISTORY

Show Text Expand Labels

04/08/25 10:36 by JRF

ITSS

Before this injury

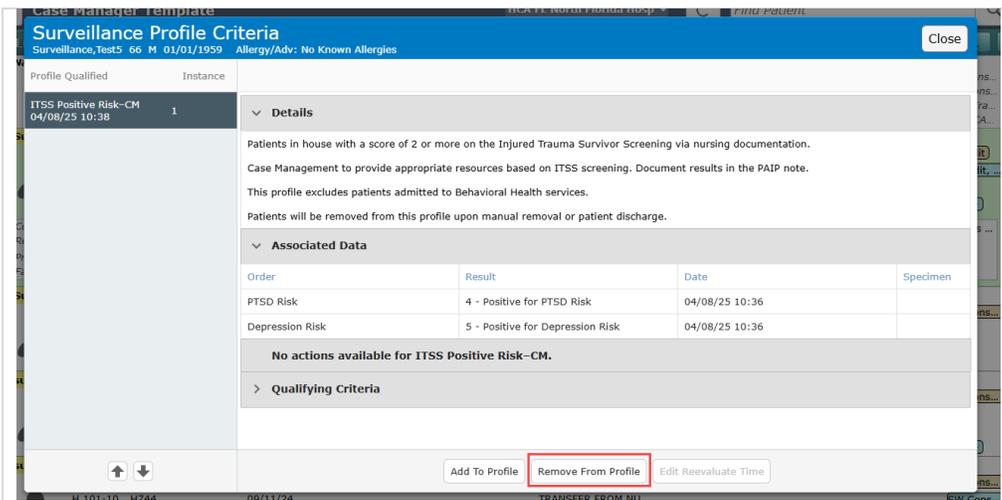
Have you ever taken medication for, or been given a mental health diagnosis	1-Yes
Has there ever been a time in your life you have been bothered by feeling down or hopeless or lost all interest in things you usually enjoyed for more than two weeks	1-Yes

When you were injured or right afterward

Did you think you were going to die	1-Yes
Do you think this was done to you intentionally	1-Yes

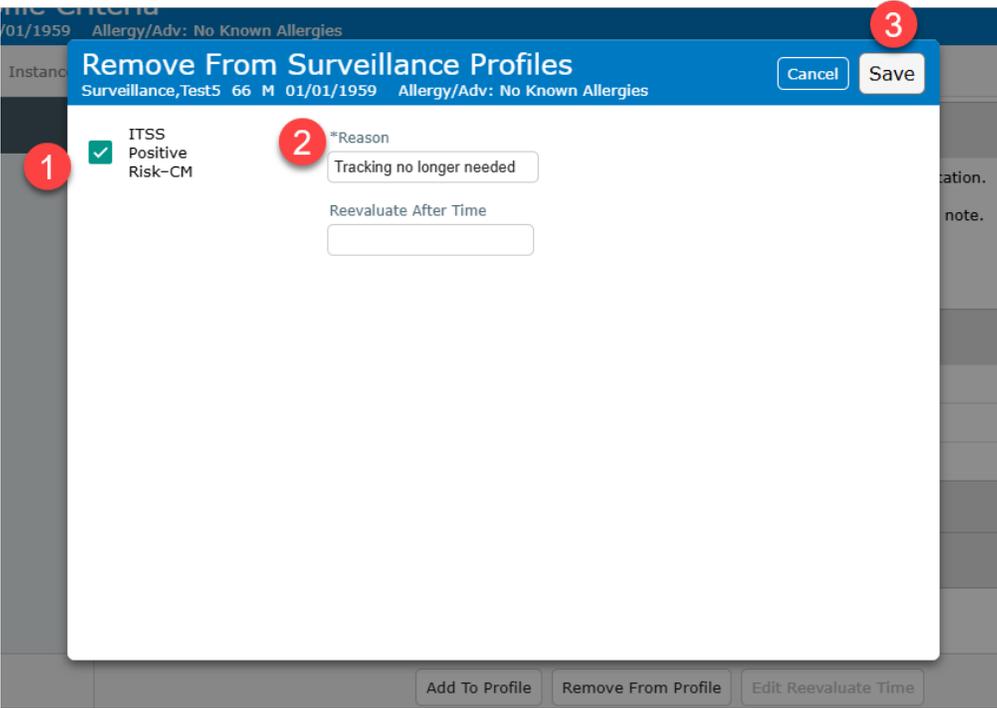
Since your injury

Have you felt emotionally	1-Yes
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After the patient’s needs related to the ITSS+ have been addressed and interventions documented, the patient should be removed from the profile through the manual removal process. This will keep the list of patients who require intervention current.

To manually remove the patient, within the Surveillance Profile Criteria overlay, select the ‘Remove From Profile’ button.

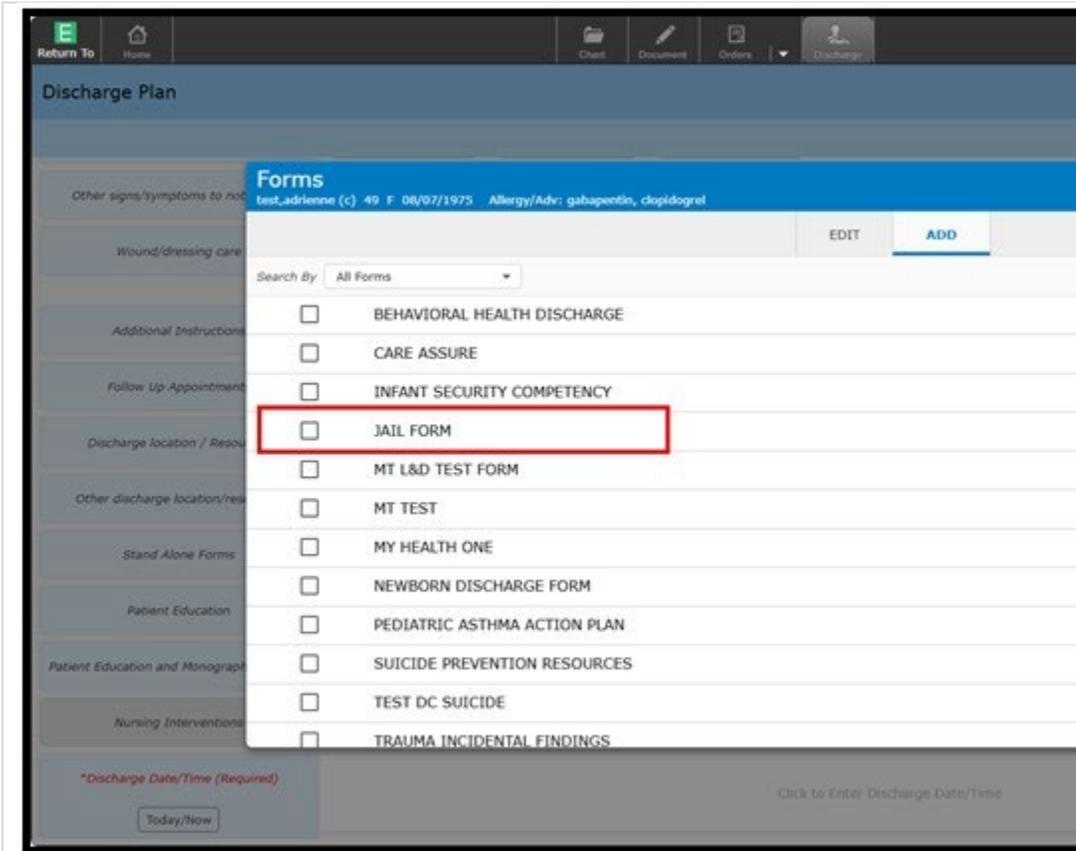


1. Select which profile you would like to remove the patient from.
2. The reason field will default ‘Tracking no longer needed’.
3. Select Save.

*Do not add a ‘Reevaluate After Time’.

Expanse TIP SHEET

Jail Form



The screenshot shows the 'Discharge Plan' interface in the Expanse system. A 'Forms' modal is open, displaying a list of available forms for patient test_adrienne (c) 49 F 06/07/1975. The 'JAIL FORM' is highlighted with a red rectangular box. Other forms listed include Behavioral Health Discharge, Care Assure, Infant Security Competency, MT L&D Test Form, MT Test, My Health One, Newborn Discharge Form, Pediatric Asthma Action Plan, Suicide Prevention Resources, Test DC Suicide, and Trauma Incidental Findings. The interface also includes a search bar, 'EDIT' and 'ADD' buttons, and a 'Discharge Date/Time' field with a 'Today/Now' button.

There will be a jail form available for patients being discharged to police custody



The screenshot shows the 'JAIL FORM' form with three text entry fields. The first field is labeled 'Patient presented with complaint of:', the second is 'The patient was treated with:', and the third is 'Patient should continue receiving the following treatment:'. Each field is currently empty.

The following fields will be available for free text entry