Concern List
User Tutorial

How to use the Concern List Tool on CHS.care

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CHS.care

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Tool Overview & Key Benefits

Purpose

The Concern List is a **daily operational tool** used to track residents who require follow-up or discussion during clinical stand-up. It serves as a shared, time-bound task list to ensure that identified concerns are acknowledged and acted on the same day.

When to Use It

Use the Concern List to:

- Capture residents flagged during **daily stand-up** or shift discussion
- Record the **reason for concern** and the **expected action**
- Track whether each concern has been **acknowledged or addressed**
- Support **stand-down** by confirming which items were resolved and which still require follow-up

What It Is (and Is Not)

- The Concern List is designed for **real-time, same-day operational follow-through**
- It is **date-specific** and resets daily to reinforce timely accountability
- It is **not a historical or reporting tool**
    - Longer-term review and oversight are handled through the **Concern List Report**

Accessing the Tool

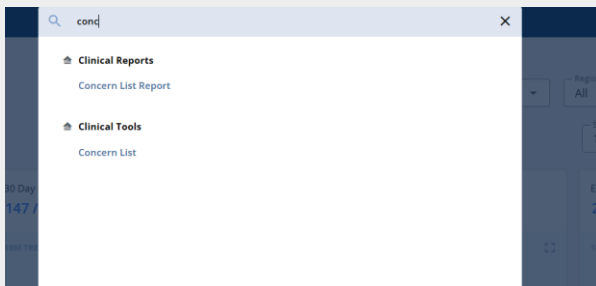Figure 1: Navigating to the Concern List from the Search Bar menu
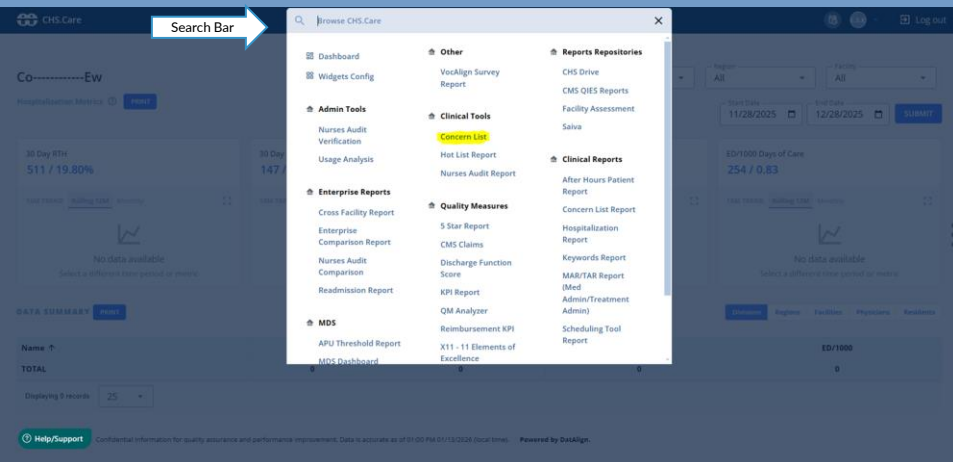
Where do I find this tool?

1. Log in to chs.care.
2. Click anywhere in the search bar located at the top center of your screen.
3. The Concern List is located in the **Clinical Tools** section of the menu.

*Note: The **Concern List** (Tool) should not be confused with the **Concern List Report**.*

Pro Tip: Begin typing the word **Concern** in the search box for quick navigation to the tool.

Default View at a Glance

Resident Concern Table Elements			
D. Status Indicator	**E. Reason & Notes**	**F. Expected Action**	**G. Actions**
A color-coded status dot shows whether the concern has been acknowledged or addressed, allowing quick prioritization.	Shows why the resident is on the list and captures brief clinical context to support discussion and follow-up.	Shows the intended next step (e.g., Nurse Assess, NP Assess), helping assign responsibility during review.	Provides direct controls to acknowledge a concern, link to related workflows, or remove the resident once no longer needed

Area	Description
A. Header & Date Context	Displays "*Resident Concern List for: [Date]*", to show which day the list applies to. Includes **Print** and **Export** actions for for sharing or offline review.
B. Add Resident	Click **Add Resident** to place a resident on today's concern list and capture the reason and expected action. New entries appear immediately in the table.
C. Resident Concern Table	A date-specific list with one row per resident concern, designed for daily stand-up review and follow-up tracking.

Adding a Resident
Step by Step Walkthrough

Add Resident ✕

(A) Search Resident Here... ▼

(B) Reason ▼

(C) Expected Action   NP ASSESS   NURSE ASSESS   SCHEDULE TELEHEALTH

(D) Note

(E) SAVE

Figure 2: Add Resident Modal

Using the Add Resident form
- Click **Add Resident** (*see Default View at a Glance*) to open the form.
- **Search and select** the resident (A).
- Choose a **Reason** (why the resident is being added today) (B).
  - **Reason dropdown (examples)**
    Select the reason that best matches the concern. Common reasons include:
    - Mental status / condition change
    - Pain
    - Abnormal labs or vital signs
    - Follow-up (recent admission/re-admission, antibiotics)
    - Recent fall
    - Poor PO intake / weight loss
    (The dropdown contains additional options.)
- Select an **Expected Action** (C):
  - NP Assess
  - Nurse Assess
  - Schedule Telehealth
- (Optional) Add a **Note** for quick context (D).
- Click **Save** to add the resident to today's Concern List (E).

Timing note
Adding residents is available until **1:00 PM (local time)**.

Acknowledge Modal at a Glance

Figure 3: Acknowledge Modal

Area	Description
A. Acknowledgement Options	Select how the concern was addressed (for example, patient seen or reviewed without a visit).
B. Selection State	Options appear as buttons with clear selected (blue fill) and unselected (no fill) states to indicate the chosen outcome.
C. Save	Save records the acknowledgement. Click on the **X** on the top right of the modal (D) to exit without saving.

Acknowledging a Concern
Step by Step Walkthrough

Figure 3: Acknowledge Modal

How to acknowledge a concern
- Click the **Acknowledge** (annotation) icon in the **Actions** column for the resident.
- In the Acknowledge modal, select the option from the list of options (A) that best reflects what occurred.
  - The selected option will turn blue, while all other options will remain white. (B)
  - You can only select one option from the list. Selecting another option will unselect a previously selected option.
  - If you do not choose an option, the status will not update even if you click save.
- Click **Save** (C) to record the acknowledgement.

What happens after acknowledgement
- The concern's **status updates** in the table to reflect the selected outcome.
- The update is recorded for **operational tracking** and later review in the Concern List Report.
- Acknowledged concerns remain visible on the list so teams can confirm what has already been addressed during stand-down.

Operational note
- Acknowledgement records **action taken**, not clinical documentation.
- Clinical details should continue to be documented in **PCC**.

Tips |FAQs | Troubleshooting

Tips for Daily Use
- Use the Concern List as a **live working list** throughout the day.
- Add brief **Notes** when needed to provide context but keep details concise—clinical documentation should remain in PCC.
- Review the list again at **stand-down** to confirm which concerns were acknowledged and which still require follow-up.

FAQs

Q: Why does the Concern List reset each day?
A: The Concern List is designed for **same-day operational follow-through**. Resetting daily helps ensure that concerns are discussed, acknowledged, and resolved in a timely manner, rather than carrying over indefinitely.

Q: What does "Acknowledged" mean?
A: Acknowledgement indicates that the concern has been **reviewed or acted on** (for example, assessed, reviewed, or a provider was contacted). It does not replace clinical documentation.

Q: Does acknowledging a concern document care in PCC?
A: No. Acknowledgement records **workflow status only**. All clinical care and assessments should continue to be documented in **PointClickCare (PCC)**.

Q: Why can't I add new residents after 1:00 PM?
A: The 1:00 PM cutoff reinforces the Concern List's role as a **daily stand-up tool**, ensuring that new concerns are identified early enough in the day to be addressed.

Troubleshooting

I don't see a resident I expect on the list
- Confirm the list date shown at the top of the page.
- Remember that the list resets daily and only includes residents added for that date.

A concern was added by mistake
- Use the **Delete** (trash can) action to remove the resident from today's list.

A concern was addressed but still appears on the list
- Acknowledged concerns remain visible so teams can confirm completion during stand-down.
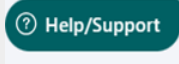- Check the **status indicator** to verify it has been acknowledged.

I need to review concerns from a previous day
- Use the **Concern List Report** to view historical concern data and acknowledgement details.

Key Reminder
The Concern List is an **operational coordination tool**, not a clinical record. Its goal is to support timely discussion, accountability, and follow-up during the day.

Support / Contact

If you encounter any issues while using this tool, please use the button at the bottom of the tool page to open a support ticket.

To ensure effective assistance, please include the following with your ticket:

- A screenshot of the issue.
- A comprehensive description, including all pertinent details like the facility name, to help us understand your experience.