



TECHNICAL BULLETIN

TRANSFERCENTERIQ™ APPLICATION

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FACILITY AND CONSULTANT NOTES ENHANCEMENT

Introduction

TransferCenterIQ™ application users can now share notes about consultants and facilities with other patient placement specialists in their healthcare system. By selecting the **i** icon () anywhere it appears in the case next to a facility or consultant, users can create and edit quick notes in the new **Facility Notes** and **Consultant Notes** fields on the information popup window. Administrators can also create and edit quick notes about consultants and facilities in the **Consultants** or **Facilities** dictionary pages. The notes field only displays the latest notes. The notes do not appear in the case log and are not saved with the case record. This enhancement provides a new field for capturing and sharing consultant and facility information that is helpful specifically for other patient placement specialists when documenting a transfer case.

Add or Edit Facility and Consultant Notes Using Dictionary Items.

1. Administrators go to the **Admin > Data > Dictionaries > Facility** or **Consultant**.
2. Select the name of a facility or consultant item that you want to add or edit a note to.
The facility or consultant details appear.
3. In the **Facility Notes** or **Consultant Notes** section, select the pencil () icon next to a previously entered note. Otherwise, select **Add a Note**.
4. In the **Notes** field that becomes active, type your note.

Notes can be a maximum of 3000 characters. As you type, text below the field displays the number of remaining characters, the date and time of the latest change, and who made the edit. An example of the **Facility Notes** field appears below. The **Consultant Notes** function in the same manner.

The screenshot shows a web application window titled "Dictionaries" with "Add Entry" and "Cancel" buttons. The main content area is titled "Facility Information" and is divided into several sections:

- Facility Details:** Includes fields for Name (Star Surgical Center), Abbreviation (S4), Phone # (412-935-8472), Address (Street: 100 Baum Blvd, City: Pittsburgh, State: PA, Zip: 15220), and Interface IDs.
- Facility Classification:** Includes checkboxes for "Referring" and "Target" (both checked), and a dropdown for "Facility Category" (Ambulatory Surgical C).
- Facility Time Zone:** Includes a dropdown for "Time Zone" (Eastern Standard Tim).
- Facility Notes:** A text area containing the note "Facility closes Fridays at 4 PM and reopens Mondays at 9 AM." Below the text area, it displays "2940 characters remaining."

The note that you entered automatically appears in the facility or consultant information dialog box wherever the facility or consultant is used in a **TransferCenterIQ™** case.

Add or Edit Facility and Consultant Notes Using Case Details

1. Patient Placement Specialists go to the **Cases** list and either select **Start New Case** to make a new case or select the pencil () icon to edit an existing case.
The case's details page appears.
2. Go to a facility or consultant field anywhere on the cases tabs.
3. After a consultant or facility has been added to the case, select the i icon () to open the facility or consultant information dialog box.
4. In the **Facility Notes** or **Consultant Notes** section, select **Add a Note** if you are adding a new note or select the pencil () icon to edit a previously entered note.
5. Type a maximum of 3000 characters for other patient placement specialists to see.

As you type, the text at the bottom of the field displays the of number remaining characters. The date and time of the latest change appears above the text field. The images below display the **Consultant Notes** field. The **Facility Notes** field works the same way.

Physician Notes

Notes added here are physician-specific and will not be associated with this case or its case log.

6. Select **Save**.

Your name appears above the text of the note.

Physician Notes

Notes added here are physician-specific and will not be associated with this case or its case log.

7. Select **Close** to return to the case's details. The note appears in the consultant or facility information dialog box whenever it is viewed in **TransferCenterIQ™** application cases.