

TECHNICAL BULLETIN

TRANSFERCENTERIQ™ APPLICATION

Version 2023-02-01

Published 2023-01-13



Technical BulletinTransferCenterlQ™ Application

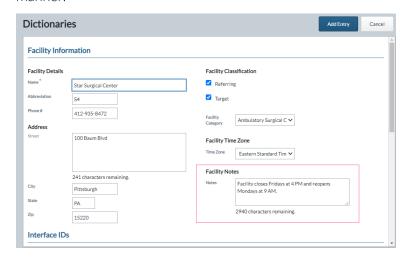
FACILITY AND PHYSICIAN NOTES ENHANCEMENT

Introduction

TransferCenterIQ™ application users can now share notes about physicians and facilities with other patient placement specialists in their healthcare system. By selecting the i icon (⑤) anywhere it appears in the case next to a facility or physician, users can create and edit quick notes in the new Facility Notes and Physician Notes fields on the information popup window. Administrators can also create and edit quick notes about physicians and facilities in the Physicians 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 physician and facility information that is helpful specifically for other patient placement specialists when documenting a transfer case.

Add or Edit Facility and Physician Notes Using Dictionary Items.

- 1. Administrators go to the Admin > Data > Dictionaries > Facility or Physician.
- Select the name of a facility or physician item that you want to add or edit a note to.The facility or physician details appear.
- 3. In the **Facility Notes** or **Physician 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 Physician Notes function in the same manner.



1/13/23 _______ 1



Technical Bulletin

TransferCenterIO™ Application

The note that you entered automatically appears in the facility or physician information dialog box wherever the facility or physician is used in a **TransferCenterlQ** $^{\text{TM}}$ case.

Add or Edit Facility and Physician Notes Using Case Details

- 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 physician field anywhere on the cases tabs.
- 3. After a physician or facility has been added to the case, select the **i** icon ($^{\textcircled{1}}$) to open the facility or physician information dialog box.
- 4. In the **Facility Notes** or **Physician 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
 Physician Notes field. The Facility Notes field works the same way.

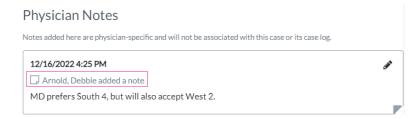
Physician Notes

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.



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