TECHNICAL BULLETIN

TRANSFERCENTERIQ™ APPLICATION

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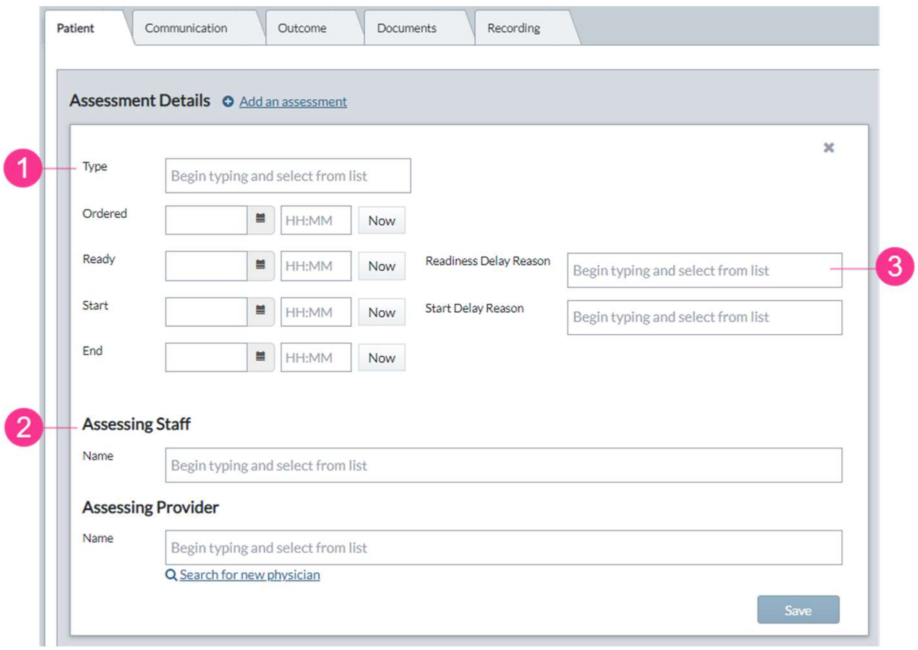
PATIENT ASSESSMENTS INTRODUCTION

The new Assessments section on the Patient tab of the patient's transfer case record allows you to document assessments conducted for the patient. Fields within the assessment section include various data points such as the type of assessment (initial assessment vs. re-assessment), the assessment order date/time, assessment start and end time, etc. Multiple assessments can be recorded on a case if applicable.

SETUP ASSESSMENTS

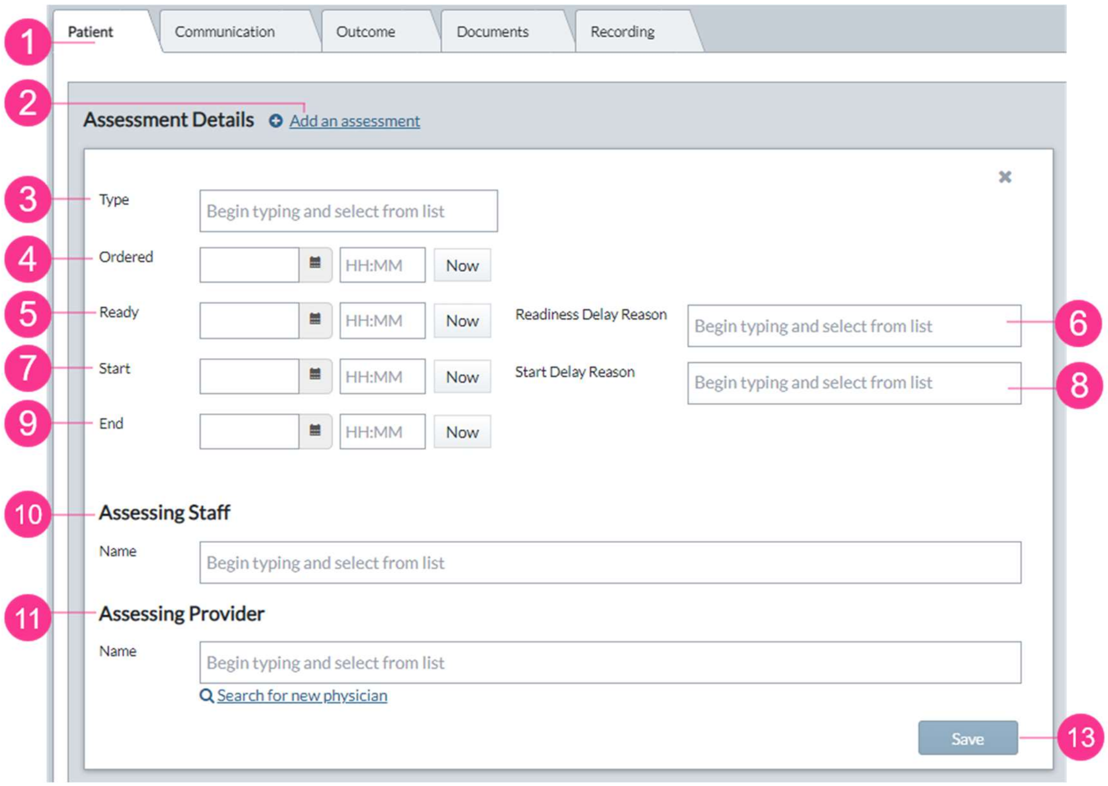
Administrators need to go to Admin > Data > Dictionaries and enter the following dictionary items to setup their healthcare system for assessments. These items appear in the selection lists in the Assessment Details card on the transfer case's Patient tab:



1. Assessment Type – The type of assessment performed, such as Initial Assessment or Re-assessment.
2. Staff – Staff members who are qualified to perform assessments and are not included in the National Provider Index (NPI) registry in the United States.
3. Delay Reason – The reason that a patient's assessment is delayed.

ENTERING A NEW ASSESSMENT

1. Go to the case's Patient tab > Assessment section.
2. Select Add an assessment to display the Assessment Details section.



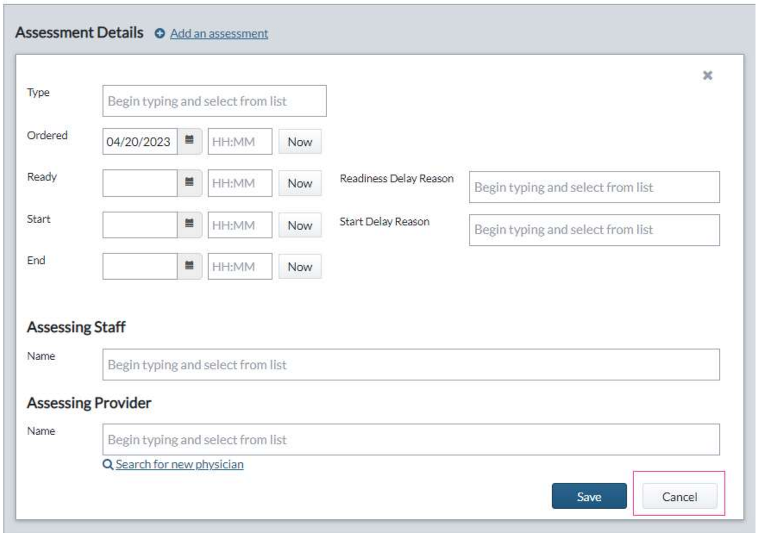
Complete the fields that you need as described below.

3. Type – Select the type of assessment that you are completing.
4. Ordered – Select the date and time that the assessment was ordered for the patient.
5. Ready – Select the date and time that the assessing staff member was available to perform the assessment.
6. Readiness Delay Reason –Select the reason why the assessing staff member was delayed in getting ready to perform the assessment.
7. Start – Select the date and time that the assessing staff member began performing the assessment.
8. Start Delay Reason –Select the reason why the assessment was prevented from starting on time.
9. End – Select the date and time that the assessing staff member finished performing the assessment.

10. Assessing Staff – Enter the name of the assessing staff member who is not in the National Provider Index (NPI) registry (customers in the United States).
11. Assessing Provider – Enter the name of the assessing staff member who is in the National Provider Index (NPI) registry (customers in the United States) or select Search for new physician. You can select the i icon to view information about the provider whom you selected.
    Your Assessment Details selections are immediately saved when you click outside the fields.
12. To add another assessment, select Add an assessment and another card appears.
    Note: You can add a maximum of 50 assessments to each transfer case.
13. To save the assessment, do one of the following:
    - Select Save in the assessment card. The Save button becomes active after you make changes in the fields in the assessment card. After you select Save, the button becomes inactive until there are new changes to the assessment card.
    - Select Save or one of the Save menu options in the top right of the case. This will save all changes on all case tabs.

CANCELING AN ASSESSMENT

The Cancel button appears and is enabled when there are unsaved changes to the assessment fields.

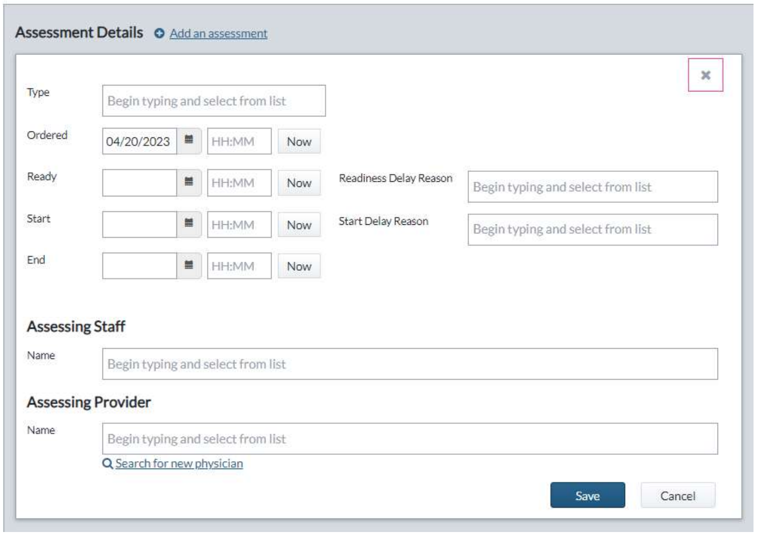


To remove data in the assessment card, select Cancel. One of the following happens:

- If you *have not* previously saved the assessment, all the fields will clear.
- If you *have* previously saved the assessment, all edits change to what they were when the assessment was last saved.

DELETING AN ASSESSMENT

On the Patient tab > Assessments section, select the x in the top right corner of the Assessment Details card.



To remove data in the assessment card, select Cancel. One of the following happens:

- If you have *not* previously saved the assessment, all the fields will clear.
- If you *have* previously saved the assessment, all edits change to what they were when the assessment was last saved.