



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:

The screenshot shows the 'Assessment Details' form within the 'Patient' tab. The form has several sections:

- Type:** A dropdown menu with the placeholder text 'Begin typing and select from list'. A red callout '1' points to this field.
- Ordered:** A time selection field with 'HH:MM' and 'Now' options.
- Ready:** A time selection field with 'HH:MM' and 'Now' options. Next to it is a 'Readiness Delay Reason' dropdown with the placeholder 'Begin typing and select from list'. A red callout '3' points to this dropdown.
- Start:** A time selection field with 'HH:MM' and 'Now' options. Next to it is a 'Start Delay Reason' dropdown with the placeholder 'Begin typing and select from list'.
- End:** A time selection field with 'HH:MM' and 'Now' options.
- Assessing Staff:** A section with a 'Name' dropdown field. A red callout '2' points to this field.
- Assessing Provider:** A section with a 'Name' dropdown field and a link 'Search for new physician'.

 A 'Save' button is located at the bottom right of the form.

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.

The screenshot shows the 'Assessment Details' form within the 'Patient' tab. The form includes the following fields and callouts:

- 1**: Patient tab
- 2**: Add an assessment button
- 3**: Type dropdown menu
- 4**: Ordered date and time (HH:MM) and Now button
- 5**: Ready date and time (HH:MM) and Now button
- 6**: Readiness Delay Reason dropdown menu
- 7**: Start date and time (HH:MM) and Now button
- 8**: Start Delay Reason dropdown menu
- 9**: End date and time (HH:MM) and Now button
- 10**: Assessing Staff Name dropdown menu
- 11**: Assessing Provider Name dropdown menu with a 'Search for new physician' link below it
- 13**: Save button

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.

The screenshot shows a form titled "Assessment Details" with a sub-header "Add an assessment". The form contains several sections:

- Type:** A text input field with the placeholder "Begin typing and select from list".
- Ordered:** A date input field showing "04/20/2023", a time input field with "HH:MM", and a "Now" button.
- Ready:** A text input field, a time input field with "HH:MM", a "Now" button, and a "Readiness Delay Reason" text input field with the placeholder "Begin typing and select from list".
- Start:** A text input field, a time input field with "HH:MM", a "Now" button, and a "Start Delay Reason" text input field with the placeholder "Begin typing and select from list".
- End:** A text input field, a time input field with "HH:MM", and a "Now" button.
- Assessing Staff:** A section with a "Name" text input field and the placeholder "Begin typing and select from list".
- Assessing Provider:** A section with a "Name" text input field and the placeholder "Begin typing and select from list". Below this is a link "Search for new physician".

At the bottom right of the form, there are two buttons: a blue "Save" button and a grey "Cancel" button. The "Cancel" button is highlighted with a red box, indicating it is the focus of the section.

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.

The screenshot shows the 'Assessment Details' form with the following fields:

- Type:** Text input field with placeholder 'Begin typing and select from list'.
- Ordered:** Date field (04/20/2023), Time field (HH:MM), and 'Now' button.
- Ready:** Text input field, Time field (HH:MM), and 'Now' button.
- Start:** Text input field, Time field (HH:MM), and 'Now' button.
- End:** Text input field, Time field (HH:MM), and 'Now' button.
- Readiness Delay Reason:** Text input field with placeholder 'Begin typing and select from list'.
- Start Delay Reason:** Text input field with placeholder 'Begin typing and select from list'.
- Assessing Staff:** Text input field with placeholder 'Begin typing and select from list'.
- Assessing Provider:** Text input field with placeholder 'Begin typing and select from list' and a search link 'Search for new physician'.

At the bottom right of the form are 'Save' and 'Cancel' buttons. A red box highlights the 'x' close button in the top right corner of the 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.