From the Office of Health Informatics

Quick Reference Guide (QRG)
Complete Provider Handoff

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This Quick Reference Guide (QRG) demonstrates the steps for completing the Provider Handoff.

Common Buttons & Icons

	List Maintenance icon
	Add arrow icon
	Customization drop-down arrow
	Green Circle Check icon

Create a Location List

➢ **From the patient list screen:**

STEP 1: Click the **List Maintenance** icon.

STEP 2: Click **New** in the Modify Patient List window.

STEP 3: Click **Location** for the patient list type.

STEP 4: Click **Next.**

STEP 5: Click the **Locations** folder + icon.

STEP 6: Scroll to find the needed location.

STEP 7: Click the + icon next to the location.

STEP 8: Click the + icon next to the needed location option.

STEP 9: Select the checkbox for the specific needed location.

STEP 10: Click **Finish.**

STEP 11: Click the newly selected list in the Available lists pane.

STEP 12: Click the **Add** arrow icon.

STEP 13: Click **OK.**

Create Patient Specific Lists

➢ **From the patient list screen:**

STEP 1: Click the **List Maintenance** icon.

STEP 2: Click **New.**

STEP 3: Click **Custom** for the patient list type.

STEP 4: Click **Next.**

STEP 5: Click the **Enter a name** free text field and enter a name for the custom list.

NOTE: Create a unique list name. Best practice is to use First or Last name. Example: "Testing's List."

STEP 6: Click **Finish**.

STEP 7: Click the name of the custom list from the Available lists pane.

STEP 8: Click the **Add** arrow icon.

STEP 9: Click **OK**.

Add patients to the custom list individually:

STEP 1: Right-click the desired name to add it to the list.

STEP 2: Click the **Add to a Patient List** sub-menu arrow icon.

STEP 3: Click the name of the created custom list to add the patient to.

STEP 4: Click the **Patient List** tab that the patient was added to in order to review.

Add multiple patients to the custom list at one time:

STEP 1: Click the first desired patient's name to move.

STEP 2: Hold the **[Shift]** key and click the last patient's name to move. This will select the list of names.

STEP 3: Right-click one of the names for the list.

STEP 4: Click **Add to a Patient List** sub-menu arrow icon.

STEP 5: Click the name of the created custom list to add the patients.

STEP 6: Click the tab for the custom list where patients were moved in order to review.

Establish Relationships

- **From the Provider Handoff Provider Worklist tab:**

STEP 1: Use the **List** dropdown arrow to bring the appropriate list of patients in view.

NOTE: Use the Add Patient button to search for a patient and add to the current list.

STEP 2: Click **Establish Relationships**.

STEP 3: Select the **All** checkbox to select all patients at one time.

STEP 4: Select the individual patient checkbox to establish a relationship individually. Select as many or as few as desired.

STEP 5: Click the **Relationship** dropdown arrow.

STEP 6: Click the appropriate relationship.

STEP 7: Click **Establish.**

Customize Columns View

- **From the Provider Handoff Provider Worklist tab:**

STEP 1: Click the **Customization** dropdown arrow.

STEP 2: Click and drag the headers to the **Viewable**, **Not in View**, or **Not Viewable** sections.

NOTE: **There will always be 3 that are not in view.**

STEP 3: Click the **Green Circle Check** icon to disable the header. To re-enable it, click the **Red Circle X** icon.

Modify Primary Contact

- **From the Provider Handoff Provider Worklist tab:**

STEP 1: Click the **Primary Contact** name of the desired patient to modify.

STEP 2: Click the **Modify Primary Contact** hyperlink.

STEP 3: Select the **All** checkbox to select the change for all patients at one time.

STEP 4: Select the individual checkbox to select the change for only certain patients.

STEP 5: Click the appropriate radio button.

STEP 6: Click the search field that appears; then type the desired name to be listed as the Primary Contact.

STEP 7: Click the desired contact name.

STEP 8: Click **Assign** or **Assign & Close**.

Document I-PASS

- **From the Provider Handoff Provider Worklist tab:**

STEP 1: Click the right arrow icon in the **Patient name** field.

STEP 2: Click the appropriate Illness Severity.

STEP 3: Click the **Patient Summary** free text field and enter a note for the oncoming provider.

NOTE: **This information is a "nice to know" for the oncoming provider, not a recap of the progress note.**

STEP 4: Click **Save**.

STEP 5: Click the **Action** free text field.

- To leave an action for the next shift leave the Available to All checkbox selected.
- To leave a personal reminder, unselect the checkbox.

STEP 6: Click **Save**.

STEP 7: Click the **Situational Awareness & Planning** free text field. Document details; then click **Save**.

NOTE: **M*Modal and Auto Text can be used to enter information into this field.**

NOTE: **All free text information entered in I-Pass is searchable. Make sure that it professional.**

STEP 8: Click the **X Close** button or the patient's name to close the window or click another tab to navigate further.

Review Clinical Data

- **From the Provider Handoff Provider Worklist tab:**

STEP 1: Click the right arrow icon in the Patient name field.

STEP 2: Click the **Clinical Data** tab.

STEP 3: Review needed information.

NOTE: **This tab shows the last 24 to 48 hours of data as a quick view without opening the patient's chart.**

STEP 4: Click the **X Close** button or the patient's name to close the window or click another tab to navigate further.

Review Care Team Data

- **From the Provider Handoff Provider Worklist tab:**

STEP 1: Click the right arrow icon in the Patient name field.

STEP 2: Click the **Care Team** tab.

STEP 3: Review needed information.

NOTE: **This tab has the same functionality as the Provider workflow page.**

STEP 4: Click the **X Close** button or the patient's name to close the window or click another tab to navigate further.