This Quick Reference Guide (QRG) reviews 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 check box 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 your list.

NOTE: **Create a name that is unique to you. Best practice is to use your name.**

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 your custom list individually:

STEP 1:   Right-click the name you want to add to the list.

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

STEP 3:   Click the name of your custom list you want to add the patient to.

STEP 4:   Click the **Patient List** tab you just moved your patient to in order to review.

Add multiple patients to your custom list at one time:

STEP 1:   Click the first name you want to move.

STEP 2:   Hold the **[Shift]** key and click the last name you want 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 your custom list where you want to add the patients.

STEP 6:   Click the tab you have just moved your patients to in order to review.

Establish Relationships

➢   From the Provider Handoff Provider Worklist tab:

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

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

STEP 2:   Click Establish Relationships.

STEP 3:   Select the All check box to select all patients at one time.

STEP 4:   Select the individual patient check box to establish a relationship individually. You can select as many as you like, as few as one.

STEP 5:   Click the Relationship drop-down 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** drop-down arrow.

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

NOTE: **You will always have 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 patient you want to modify.

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

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

STEP 4:   Select the individual check box 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 name you would like 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.
   a. To leave an action for the next shift leave the Available to All check box selected.
   b. To leave reminder for just you, unselect the check box.

STEP 6:   Click **Save**.

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

NOTE: **You can use MModal and Autotext 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 24-48 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.