Northern Light Health

From the Office of Clinical Informatics

Home Care and Hospice
Partial & Full Transfer Visits

January 24, 2024

When a patient is transferred to a hospital or facility, documentation is required to indicate the transfer status. If the patient is admitted, a Full Transfer is performed.

Scheduling the Visit

- When you are notified of the transfer, add a visit to the **calendar**.
  - If notified patient has been sent to a hospital/facility without confirmation patient has been admitted, add a **Partial Transfer visit.**
  - If you receive an email from Intake that a patient has been admitted, add a **Full Transfer** or **Full Transfer no OASIS** based on whether patient's insurer requires an OASIS only assessment.

Starting a Visit

STEP 1: From the **Today** screen**,** locate the patient and tap the visit type to open the chart.

STEP 2: Tap **Sync** in the bottom right-hand corner. 

STEP 3: Tap **Start Visit**.

Visit Documentation

- **Partial Transfer**

STEP 1: Tap **Clinical Notes**.

- Tap **+ Add** to add a new clinical note.
  - Use Code is **C.**
  - Indicate **Partial Transfer** at the beginning of your Note.
  - Add details as to why the patient was sent, date of transfer and name of hospital/facility.
- Tap **Send to Portal.**
- Tap the **< back arrow** in the top left to save the information return to the charting page.

STEP 2: From the tile page, tap **End Visit**.

STEP 3: From **Time Entry**, submit documentation. 

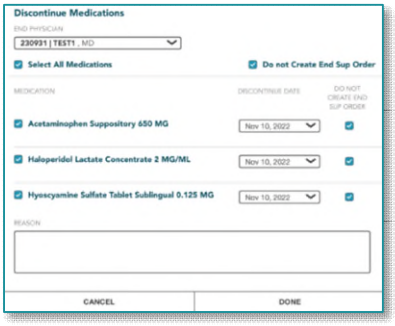
- **Full Transfer**

STEP 1: Tap **Admissions / Status**.

- Update the patient's status to **Field Transfer to facility no D/C** (at end of list).
- Update the **Status Date** to the date the patient was admitted to hospital or facility.
- In the **Facility ID** field, enter name of the hospital or facility where patient was transported.

- Scroll to **Class** and **Acuity**.
  - If **Class** indicates Home Health and **Acuity** indicates OASIS Pending, an OASIS only assessment is required.
  - If **Class** indicates Non-OASIS and **Acuity** indicates Non-OASIS, change visit type to **Full Transfer no OASIS.** An Assessment is not required so skip Step 3 below.
- Select the **< back arrow** in the top left to save the status and return to the charting page.

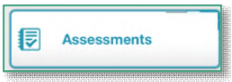
STEP 2: A warning message displays: *Warning: There are active medications for this patient. Please discontinue medications before transfer,* tap **OK**.



- Tap **End Physician** to add Provider.
- Tap **Do not Create End Sup Order**.
- Review the end date(s) for accuracy to reflect when the patient was admitted.
- Tap **Done**.
- Tap the **< back arrow** in the top left to save the information return to the charting page.
  - If the system does not open the **Medications** screen, tap **Medications** from the charting page.

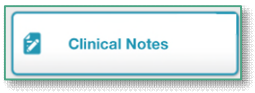
    - Tap the three dots in the lower right and tap **Discontinue**.
    - Tap **End Physician** to add Provider.
    - Tap **Select All Medications** and **Do not Create End Sup Order**.
    - Review the end date (s) for accuracy to reflect when the patient was admitted.
    - Tap **Done**.
  - Tap the **< back arrow** in the top left to save the information and return to the charting page.

STEP 3: Tap **Assessments**.



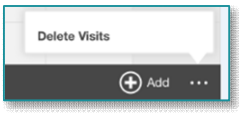
- Tap **+ Add**.
  - Template: **OASIS Only**.
  - Visit Type: **6 – Transferred to an inpatient facility – patient not discharged**. If this is not available, go to the section below for **Full Transfer no OASIS**.
  - Tap under **D/T Summary**: choose **Transfer from Agency (not Discharged)**.
  - Tap **Done**.
- Select the **< back arrow** to save the assessment and return to the charting page.

STEP 4: Tap **Clinical Notes**.

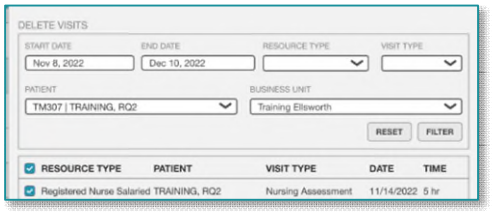


- Tap **+ Add**.
  - Use Code is **D.**
  - Indicate **Full Transfer** at the beginning of your note.
  - Include the date of transfer and hospital/facility in the Note.
  - Tap **Send to Portal**.
- Tap the **< back arrow** in the top left to save the note and return to the charting page.

STEP 5: Tap **Calendar** within the patient's chart.



- Tap the three dots in the lower right and tap **Delete Visits**.
  - Edit the **End date** to be greater than two months out to cover the certification period.
  - Leave **Resource Type** and **Visit Type** blank.
  - Tap **Filter**.
    - To delete all visits, tap the box to the left of **Resource Type** above the list of visits.
  - Tap **Done**.
- Tap the **< back arrow** in the top left to save the deleted visits and return to the charting page.



STEP 6: Tap **Visit Frequency**.

- End current **Visit Frequencies** using today's date.
  - For **Visit Frequencies** not yet started, change the **End Date** to be the same as the **Start Date**.
    - Leave **Do not Create End Sup Order** box checked (or check off if not checked) and add **Change Reason – Transfer complete**.
- Tap the **< back arrow** in the top left to save the visit frequency and return to the charting page.

STEP 7: Tap **End Visit**.

STEP 8: Navigate to **Time Entry** and submit documentation.