From the Office of Clinical Informatics

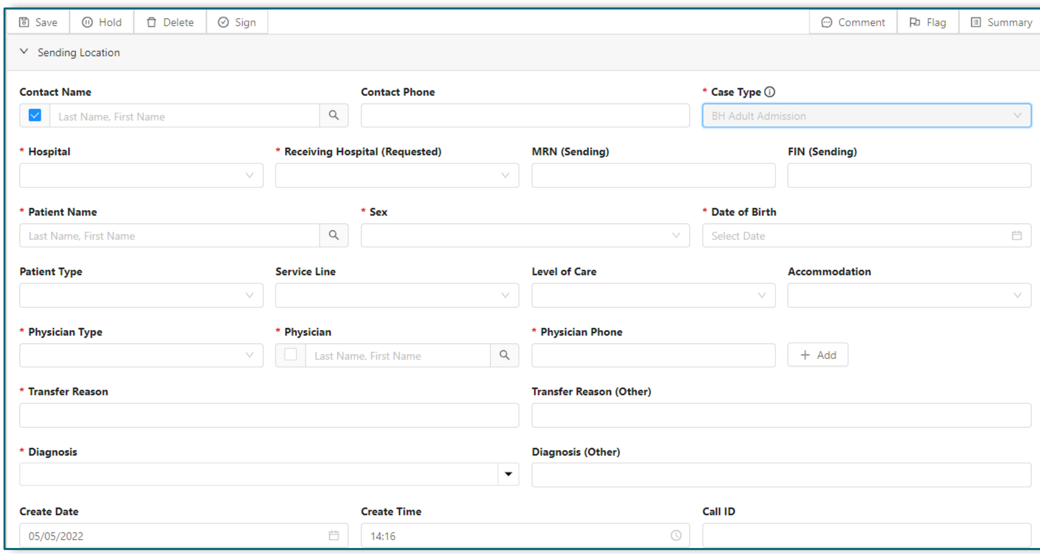
Acadia
CareAware Transfer Center

June 23, 2022

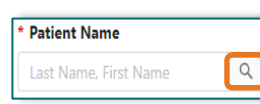
CareAware Transfer Center facilitates the tasks of clinical assessment, collaborative communication, and documentation, inherent to the process of transferring patients for direct admission. The solution is designed to track communication associated with cases and capture key metrics related to admission communications and workflows.

Case Details

Providers from various facilities will contact Acadia's Resource Center staff to discuss potential patient transfers. Staff will **Create a New Case** and document in each of the four sections as conversations occur.



- **Sending Location Section**
  - **Contact Name** and **Contact Phone:** Name and phone number of person calling in the referral.
  - **Case Type**: Defaults to **Transfer Request**. Update the distinction by selecting from the drop down.
    - Depending on the **Case Type** selected, various custom fields will become available.
  - **Hospital**: Select the sending facility from the drop-down options or begin typing the facility name to narrow the available options.
  - **Receiving Hospital (Requested)**: NL Acadia Hospital.
  - **MRN (Sending):** This will populate automatically after associating a patient to the case.
  - **Patient Name**: For existing patients, type the name and click the magnifying class icon to search the Millennium database.
    - If the identified patient is not found, click **Add New Patient**, and enter the required details. Once the user clicks **OK**, the patient will populate the list for selection.



- If unsure of the patient's name, a free text name may be added until the name is confirmed. Enter the free text name and select **Save** to save the case under the free text name.

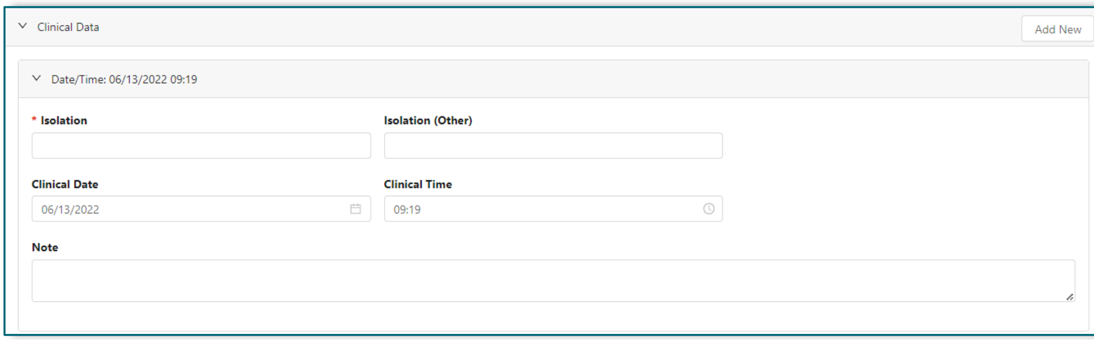
NOTE: Adding a new patient will generate an MRN for the patient. Users should confirm the patient is not an existing patient by searching in PowerChart, prior to adding a new patient.

- **Sex**: This will populate automatically after associating the patient to the case.
- **Date of Birth**: This will populate automatically after associated the patient to the case.
- **Patient Type**: Select **Emergency** if the patient is in an emergency room. Select **Inpatient** if a BH CL case type or if crisis is presenting from an inpatient bed.
- **Level of Care**: This field will be updated after the consult team reviews the patient's case.
- **Accommodation**: Indicate **Private** or **Special Monitoring**, if indicated by consult team.
  - If the patient is both **Private** and **Special Monitoring**, select **Special Monitoring** and indicate the accommodation of **Private** within the **Note** section.
- **Physician Type**: Referring Physician.
- **Physician** and **Physician Phone**: Enter information pertaining to the **sending** provider.
  - Select the **Add** button to add another physician row (up to five physicians).
  - Once the Consult Team provides the Level of Care, select **Add New** to enter the information pertaining to the **Consulting Physician**.
- **Transfer Reason**: Select the appropriate option from the dropdown.
- **Diagnosis**: Behavioral Health.
- **Diagnosis (Other):** This is a free text field that will be updated after the consult team reviews the patient's case.
- **Create Date** and **Time**: Auto populates with time the **Create New Case** button is selected. Click the field to modify.
- **Admin Sex**: Enter the patient's preferred gender.
- **Legal Status**: Indicate **voluntary** or **involuntary**, per the consult team.
- **Preferred Name**: Enter patient's preferred name, as appropriate.
- **Patient Address City/State**: Input patient's home city and state.
- **Sending Insurance**: This is a free text field for staff to document the patient's insurance. Staff may need to reference **PowerChart** for this information.
- **Next of Kin**: Free text field. Staff may need to reference **PowerChart** for this information.
- **Guardian Field:** Free text field.

- **Note**: Enter the original reason for referral. Input initials and date/time of documentation at the end of each documented note.

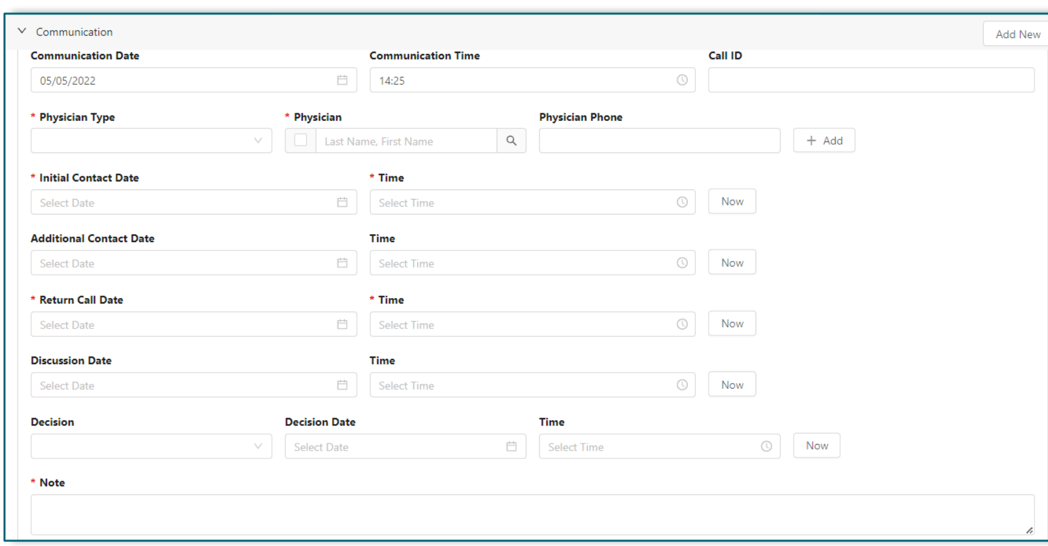
NOTE: After completing the Sending Location Note, staff will send the Case Summary to the Consult Team for review.

➢ **Clinical Data Section**: Staff will click the **Add New** Add New button to open the section for documentation.



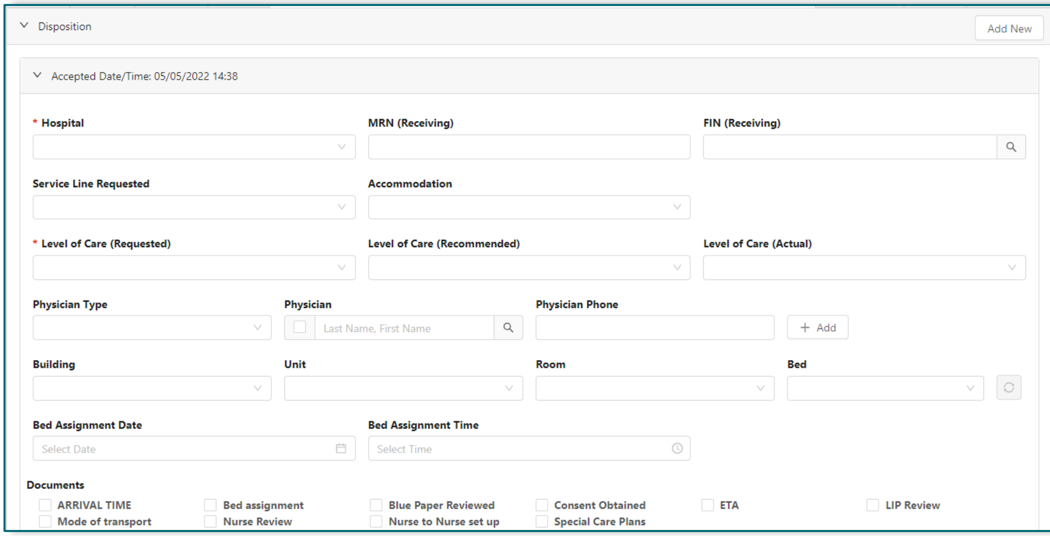
- **Isolation**: Indicate any isolation information.
- **Clinical Date** and **Clinical Time**: Auto populates with the date and time the **Add New** button was selected. Click the field to modify.
- **Note**: Free text window to document PIF update from the Consult Team.

➢ **Communication Section**: Staff will click the **Add New** Add New button to open the section for documentation.



- **Communicate Date** and **Communicate Time**: Auto populates with the date and time the **Add New** button was selected. Click the field to modify.

- **Physician Type**: Indicate the personnel reviewing the patient's case. Unit Nurse, House Admin, etc.

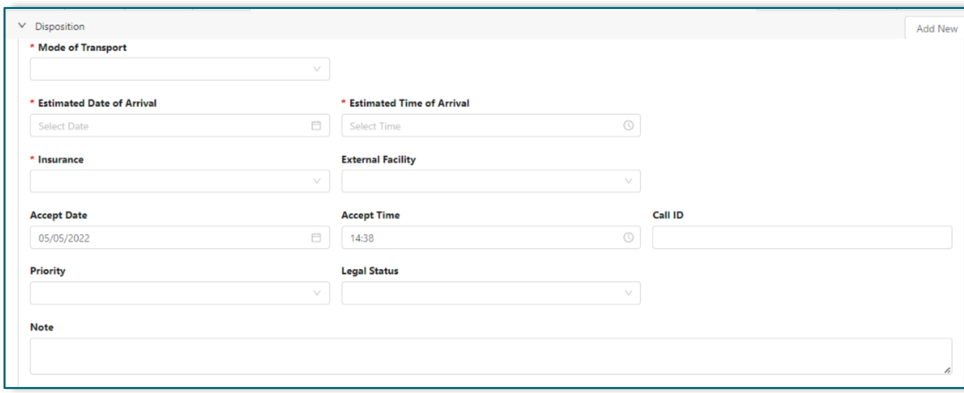


- **Physician** and **Physician Phone**: Enter information pertaining to the reviewing nurse.
- **Initial Contact Date** and **Time**: Select the **Now** button or click in the window to adjust for an accurate reflection of when the patient is initially sent for review.
- **Additional Contact Date** and **Time**: This section is utilized when the reviewing nurse requests additional information regarding the patient.
- **Return Contact Date** and **Time:** Select the **Now** button or click in the window to adjust for an accurate reflection when the decision has been made.
- **Decision**: Select an option from the drop-down list to indicate the case decision. This will automatically open the **Disposition** section for additional information to be entered.
  - It is recommended to input the information into the **Note** section prior to entering the **Decision** because once the decision has been entered, the **Disposition** section will automatically open.
- **Note**: Document nursing communication regarding decision (i.e., reason for decline). Each time the patient is represented, staff will add information to the notes with the date and time the patient is represented with the staff's initials.

➢ **Disposition Section**: Staff will click the **Add New** Add New button and select **Accept**, **Cancel**, or **Decline**. Once the decision has been selected, the section will open for documentation. A new disposition will be created until the patient is accepted or cancelled.

- **Hospital**: NL Acadia Hospital
- **Accommodation**: Select from the drop down.

- **Level of Care (Requested)**: Admitting level of care provided by the consult team.
- **Physician Type**: Admitting Physician.
- **Physician** and **Physician Phone**: The Physician information entered in the Communication section will flow here. Click the **+Add** [+ Add] button to enter information pertaining to the LIP assigned to the patient.
- **Building**: Inpatient.
- **Unit**, **Room, & Bed**: Input accepted location, per reviewing nurse.
- **Documents:** Indicate Blue Paper Reviewed, Nurse to Nurse set up, or LIP review, as appropriate.



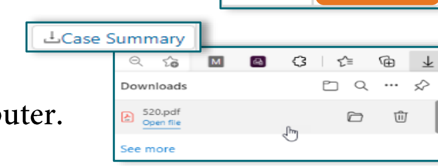
- **Mode of Transport**: Indicate how the patient will be transported.
- **Estimated Date** and **Time of Arrival**: Input the actual admission date and time, captured in **PowerChart**.
- **Insurance:** This is a required field; select the most appropriate option from the drop down.
- **Accept Date** and **Accept Time**: When the patient has been accepted, the date and time will automatically populate. Click the field to modify.
- **Legal Status:** Indicate voluntary or involuntary, per consult team.
- **Note**: Document the associate's actions taken to coordinate the admission.

NOTE: All required fields for documentation have been outlined within this flyer.

Print Case Summary

STEP 1: To print the case summary, open the case and select **Summary**.

STEP 2: From the summary page, select **Case Summary**.



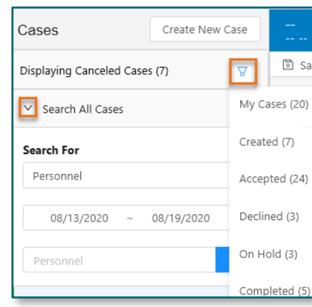
STEP 3: The case summary can be found within **Downloads** on your computer. Open the PDF to print or save the summary.

Additional Features of CareAware Transfer Center

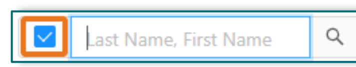
- **Save:** Select to save case documentation. The patient's case may be saved at any time.
- **Hold:** Used to indicate a Clinical Alert. 

NOTE: Acadia Leadership will be responsible for updating hold statuses.

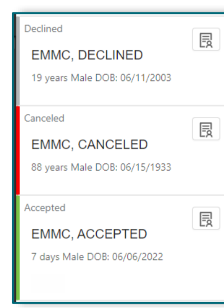
- **Delete:** Used to remove a case entered on an incorrect patient or duplicate entries.
- **Sign:** Used to complete the case.
- **Comment:** Used as communication between Resource Center staff. Comments are added under the Comment header in reverse chronological order. 
- **Summary:** Used to display case details in a readable format.
- **Filter:** Click the filter icon to select a specific case status. The **My Cases** filter can be expanded to choose additional options.



- **Search:** Expand the window and update the **Search For** criteria and **Date Range** as needed and enter the information to display options. Clear the search when done.
- **Free text name entry**: To enter a free text name, such as patient or provider, select the box next to the field to input a free text entry.



Indicators & Attributes



To view information pertaining to an attribute, hover over the attribute.

- **Grey Bar**: A gray bar next to the patient case indicates a **Declined** status.
- **Red Bar**: A red bar next to the patient case indicates a **Canceled** status.
- **Green Bar**: A green bar next to the patient case indicates an **Accepted** status.
- **Completed Cases**: Completed cases will be indicated with a green circle and checkmark.
- **Patient associated to Case**: Once the patient has been associated to the case by searching the patient or adding a new patient, a grey person attribute will display. 
    - When the patient's case has been associated to a FIN, the person attribute will turn green. 
- **Bed Requested**: When a case has been accepted to the facility, a black bed attribute will display. 
    - When the bed assignment has been saved to the patient case, a green bed attribute will display.