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| --- | --- | --- | --- | --- | --- | --- |
| Quality Check | | Safety Precaution | | Standard WIP | | |
| Standard Work for Transition Care RN for Phone Clinic | |  | |  | | |
| Notes: | | | | | | |
| Who Must Adopt This Process:  Transition Care RN | | | | Takt Time: | | |
|  | | | | | | |
| GOAL: To contact patients within 24 to 72 hours (w/e) to optimize transition from inpatient to outpatient care. | | | | | | |
| STEP | OPERATOR | | TASK DESCRIPTION | | TOOLS/SUPPLIES REQUIRED | CYCLE TIME |
| 1. **Communication** | Transition Care RN | | Check voice mail(s), email, in-basket, pager. | | Phone(s), pager, computer. | 15 mins |
| **2. Identify med/surg patients discharged since prior phone clinic.** | Transition Care RN | | Run ccLink Transition Care Discharge Report for appropriate time period(s). | | Computer | 5 mins |
| **3. Review of patient hospitalization and dc plan prior to call.** | Transition  Care RN | | Review discharge summary, after visit summary, any post-d/c encounters, med list, future appointments, etc. prior to call. | | Computer | 15 – 30 minutes: #3 – 8 per patient |
| **4. Patient phone call/documentation** | Transition  Care RN | | Open patient chart and choose encounter type: Transition Care Phone Clinic. Call patient using PROACT Phone Clinic Tool/Documentation template to review dx, sx, medications, followup appts/services, followup tests, discharge instructions, etc. | | Computer; encounter template; phone |  |
| **5. Identify and address unmet needs identified during call. Assess for clinical deterioration.** | Transition Care RN | | Call pharmacy, SW, Appointment Unit (vs. schedule appt. – MD, pt ed, dietitian, etc.), Financial Counselor, Advice Nurse, discharging MD, PCP, etc. with warm handoff if possible. Refer for home visit if appropriate. | | Computer  Phone  Appointment scheduling access  Resource contact info |  |
| **6. Determine if call back needed; schedule.** | Transition Care RN | | Schedule call back with patient. Send In-Basket reminder to Transition Care Nurse with date/time/indication. | | Computer |  |
| **7. Documentation.** | Transition Care RN | | Complete Transition Care Phone Clinic Tool/Documentation template including interventions. | | Computer |  |
| **8. PCP and other post-dc provider communication.** | Transition Care RN | | In-basket chart check message to PCP and other post discharge providers as appropriate. Add note of special concerns as needed. | | Computer |  |
| **9. Patient not able to be contacted.** | Transition Care RN | | In-Basket message/reminder to Transition Care RN of name of patient not able to be reached by phone for attempt to call next day. Include date(s) of attempted contact. If no working phone contact information, document with “Documentation” encounter type. Send letter? See #12. | | Computer |  |
| **10.**  **\*? Data collection** | Transition Care RN | | \*???? Via ccLink.  (Versus input data in “*PRO-ACT*” (to be created?) folder in “s-drive” in “My Computer”.) | | (Excel spreadsheet) |  |
| **11. Call patients determined to need call back during prior phone call.** | Transition Care RN | | Check In-Basket. Document encounter in chart: ‘Documentation’ encounter type. | |  |  |
| **12. Call patients not reachable on prior days. (***3 attempts***?)** | Transition Care RN | | Check In-Basket. | |  |  |
| **13. \*? Send letter to patients unable to be reached by phone.** | Transition Care RN | | \*??? Generate/modify “CHF Letter Follow-Up Post D/C” letter from “Health Center Clinic Forms” folder under “Medical Record Forms” icon.  Fill out and mail to patient. | | Computer  Mail |  |
| **14. Patient Educator role** | Transition Care RN | | TBA – MDT? Bedside teaching/Teach back? | |  |  |
|  |  | |  | |  |  |

**Photo Page**

***(optional; use as many sections as needed and post with the standard process description)***

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| --- | --- |
| Photo Placeholder | **DEFECTIVE EXAMPLE**  (of finished product or key process step;add notes as needed) |
| Photo Placeholder | **DEFECT-FREE EXAMPLE**  (of finished product or key process step;add notes as needed) |