



Allscripts Patient Flow™ 22.1

Transfer Center User Guide

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Table of Contents

Chapter 1: About the Transfer Center Module	5
Transfer Center capabilities and advantages.....	5
Transfer Center module windows.....	7
Chapter 2: Transfer Center Configuration	8
Attributes Configuration.....	8
User roles and permissions.....	9
Transfer Center Maintenance.....	10
Create and edit Decline Reasons.....	11
Create and edit Case Dispositions.....	12
Create and edit Case Types.....	13
Create and edit Physician Call Status Reasons.....	14
Create and edit Physician Call Statuses.....	15
Create and edit Source Type.....	17
Create and edit Source Locations.....	18
Chapter 3: Using the Transfer Center Worklist	20
Functions on the Transfer Center Worklist window.....	20
Open and close rows.....	20
Use tabs and filters to display information.....	21
Create a filters tab.....	22
Edit or delete a filters tab.....	24
Create Transfer Center cases.....	24
Create new Transfer Center cases.....	24
Edit Transfer Center cases.....	29
Close active cases.....	31
Chapter 4: Transfer Center Closed Case Worklist	33
Closed Case Worklist.....	33
Search closed case worklist.....	35
Chapter 5: Future Admits worklist	37

For more information	38
Index	40

Chapter 1

About the Transfer Center Module

Transfer Center capabilities and advantages

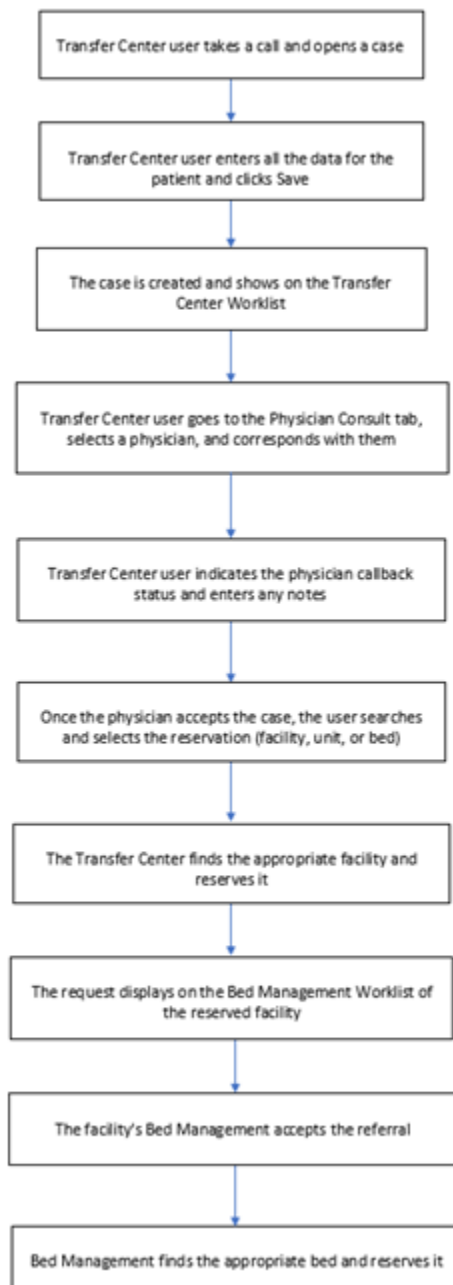
Transfer Center module is a browser-based tool that enables users to efficiently manage the movement of patients through the care delivery process.

Many hospitals and health systems today have a centralized transfer or command center to oversee patient through-put on a global level. These centers offer many benefits including increased efficiency, optimization of system wide bed utilization, and increased acceptance rates which in turn can help increase revenue, as well as physician and patient satisfaction and loyalty. The Allscripts Patient Flow™ Transfer Center Module is an add-on module that works in conjunction with the existing patient flow software to support this mission.

Created with the call center nurse in mind, the Transfer Center Module provides functionality for efficient handling of unplanned and emergent admissions by enabling the quick capture of relevant caller and patient information. Features include the ability to rapidly ascertain bed availability within a single hospital or across multiple facilities of a health system, and the option to reserve incoming patients to the bed, unit or facility level.

Note: Use Microsoft® Internet Explorer® 11 as the browser application.

Figure 1: Transfer Case request workflow



Transfer Center module windows

Use the Transfer Center windows, Transfer Center Worklist and Closed Case Worklist, to manage transfer center cases.

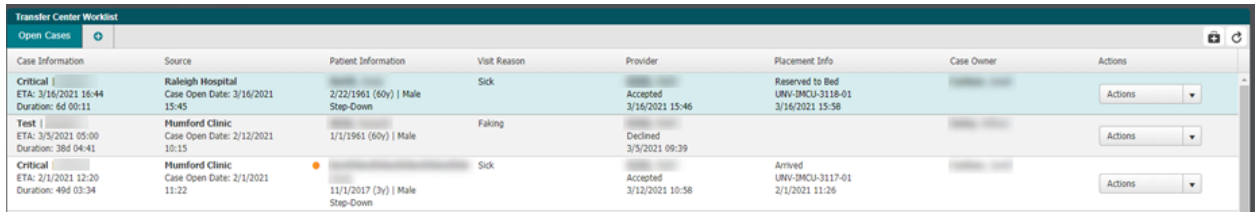
The Transfer Center Module provides the capability to create, edit, cancel, view, or close specific transfer center cases.

The Transfer Center Module consists of the following patient-oriented windows:

- > Transfer Center Worklist—Create Direct Admit cases, find a facility, reserve a facility, cancel or reject a reservation, or close a case.
- > Closed Case Worklist
- > Search Closed Cases
- > Future Admits Worklist

If you have authorization for the Transfer Center, you can perform all of the previous actions except create a new case. To create new cases, you must be assigned to the Care Team Role, which authorizes you as part of the Transfer Center Intake Staff .

Figure 2: Transfer Center Worklist



Case Information	Source	Patient Information	Visit Reason	Provider	Placement Info	Case Owner	Actions
Critical ETA: 3/16/2021 16:44 Duration: 60 00:11	Raleigh Hospital Case Open Date: 3/16/2021 15:45	2/22/1961 (60y) Male Step-Down	Sick	Accepted 3/16/2021 15:46	Reserved to Bed UNV-IMCU-3118-01 3/16/2021 15:58	[Redacted]	Actions
Test ETA: 3/5/2021 05:00 Duration: 384 04:41	Humford Clinic Case Open Date: 2/12/2021 10:15	1/1/1961 (60y) Male	Faking	Declined 3/5/2021 09:39		[Redacted]	Actions
Critical ETA: 2/1/2021 12:20 Duration: 496 03:34	Humford Clinic Case Open Date: 2/1/2021 11:22	11/1/2017 (3y) Male Step-Down	Sick	Accepted 3/12/2021 10:58	Arrived UNV-IMCU-3117-01 2/1/2021 11:26	[Redacted]	Actions

Chapter 2

Transfer Center Configuration

Attributes Configuration

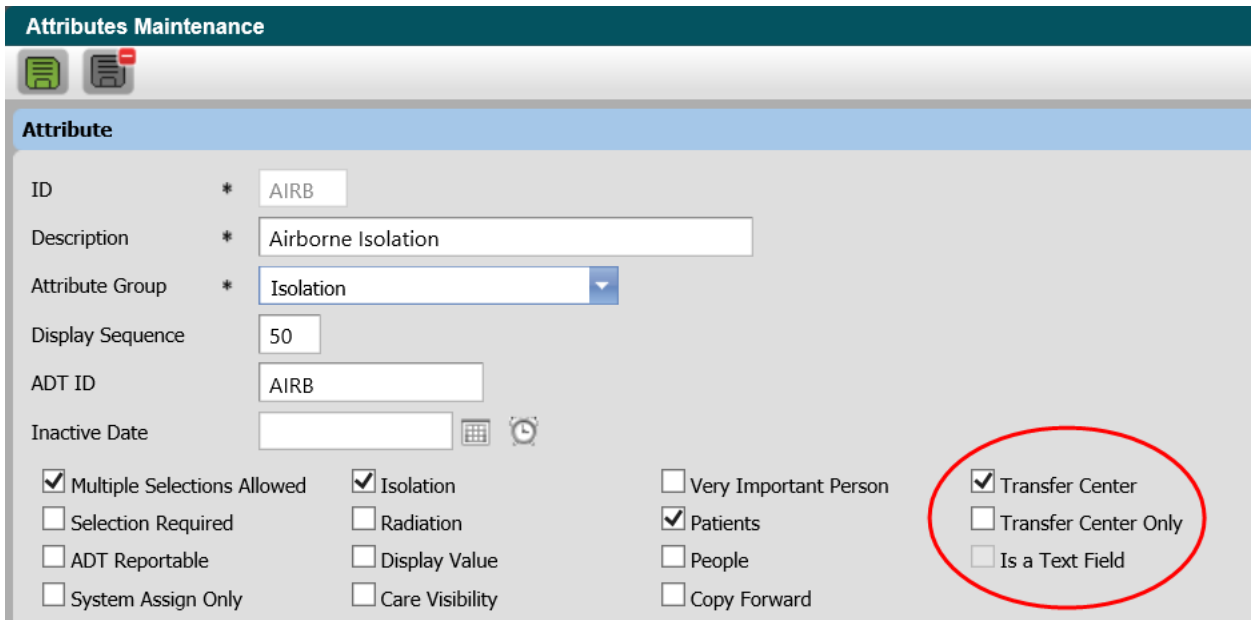
Your system administrator can select which attributes to associate with the transfer center.

Any attributes that you want to associate to Transfer Center for a patient-driven attribute must have either **Transfer Center** or **Transfer Center Only** selected on **Advanced Maintenance > Attributes**. You can also indicate that the attribute should be a text field if necessary.

The system option **TCBF** allows users to reserve to a hospital when no beds are available.

The system option **TCUB** allows users to reserve to a bed or unit in Transfer Center.

Figure 3: Attributes Maintenance, Airborne Isolation Example





The screenshot shows the 'Attributes Maintenance' window for an attribute named 'AIRB' (Airborne Isolation). The attribute is grouped under 'Isolation' and has a display sequence of 50. The 'Inactive Date' field is empty. A red circle highlights the 'Transfer Center' configuration options, which include:

- Multiple Selections Allowed
- Selection Required
- ADT Reportable
- System Assign Only
- Isolation
- Radiation
- Display Value
- Care Visibility
- Very Important Person
- Patients
- People
- Copy Forward
- Transfer Center
- Transfer Center Only
- Is a Text Field

User roles and permissions

Before using the Transfer Center Module, your system administrator must set up roles and permissions for each user.

1. Assign the user the applicable **Auth Role**.
 - a. Navigate to **Admin > User Maint > Users**
 - b. Enter criteria to find the applicable user and select **Search**.
 - c. Double-click the applicable user row and click the **Auth Role** tab.
 - d. Scroll down and select the box for TCTR (Transfer Center).

|| **Note:** This role is attached to the Organization Type - Region.
2. Assign the user the **Auth Item** ability to add and edit physician's for the Transfer Center.
 - a. Click the **Auth Item** tab and click **New**.
 - b. If you are the user responsible for adding providers that are able to consult on transfer center cases, click the **Auth Item** list, select **Add/Edit Physicians**, and then click **OK**.
This new authorization permission is displayed in the list.
3. Assign the **Care Team Role** to the user.
 - a. Click the **Care Team Role** tab.
 - b. Select the box to enable TCIS (Transfer Center Intake Staff).
This activates the user as part of the Transfer Center Intake Staff.
4. Select  to retain these changes with the user's profile.
5. Add physicians who can consult and assign them the care team role:
 - a. Navigate to **Admin > User Maint** and under **Users**, select the **Only Show Physicians** check box, and then click **Search**.
 - b. Scroll through the list to find the physician to add to the care team and double-click the row with the physician name.
 - c. On the **Care Team Role** tab, click the list for the **Role Type** and select **Transfer Center Physician**.
 - d. Select **TCCS** to enable the physician as a **Transfer Ctr Consult**.
6. Select  to retain these changes with the physician's profile.

Transfer Center Maintenance

Your system administrator can customize many aspects of the Transfer Center Module for use with your facility.

You must configure the Transfer Center Module in the following sequence. Information for creating and editing each of these criteria includes:

1. Case Type
2. Case Disposition
3. Case Decline Reason
4. Physician Call Stat
5. Physician Call Stat Reason
6. Source Type
7. Source Location
8. Patient Attributes for Transfer Center

Figure 4: Transfer Center Maintenance

Transfer Center
Case Cancel Reason
Case Decline Reason
Case Disposition
Case Type
EMTALA Reasons
Physician Call Stat Reason
Physician Call Stat
Source Location
Source Type
My Settings
Facility Maint
User Maint
Advanced Maint
Transfer Center

Create and edit Decline Reasons

Your system administrator can create and edit Transfer Center case decline reasons that are customized for your organization.

1. Select **Admin > Transfer Center > Case Decline Reason**.
2. To create a new case decline reason, perform the following steps.
 - a. In the **Values** pane, click **New**.
 - b. Enter a four-character maximum description in the **Sys ID**.

Note: System IDs can be alphanumeric, but ensure each is unique. After System IDs are created, they cannot be edited.


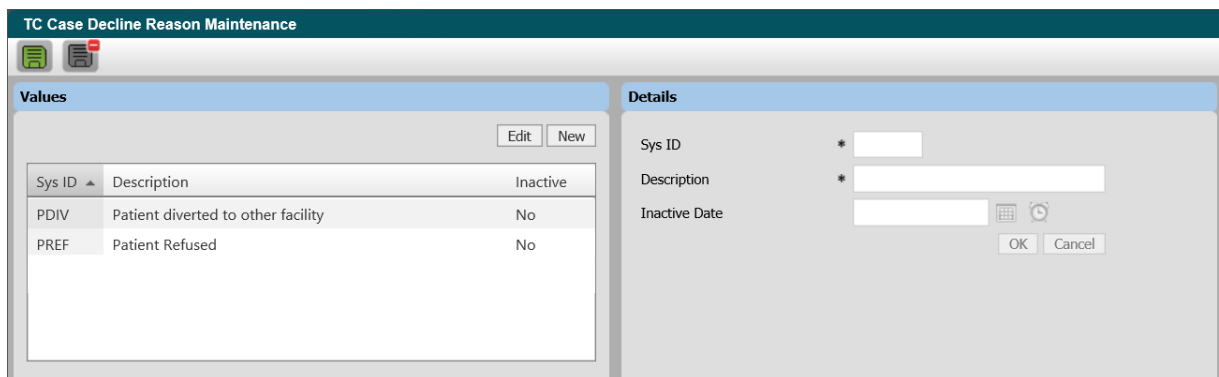
- c. In **Description** enter a description of the decline reason.
 - d. If the decline reason is temporary, enter the date on which the decline reason becomes inactive.
 - e. Click **OK**, and then click **Save** ().
The decline reason is displayed in the **Values** pane.
3. To edit an existing case decline reason, perform the following steps.
 - a. In the **Values** pane, select the decline reason to edit.
 - b. Click **Edit** to view the decline reason data in the **Details** pane.
 - c. Make any required changes to the decline reason, and then click **OK**.
 - d. Click **Save**.

Figure 5: TC Case Decline Reason Maintenance



Create and edit Case Dispositions

Your system administrator can create and edit Transfer Center case dispositions that are customized for your organization.


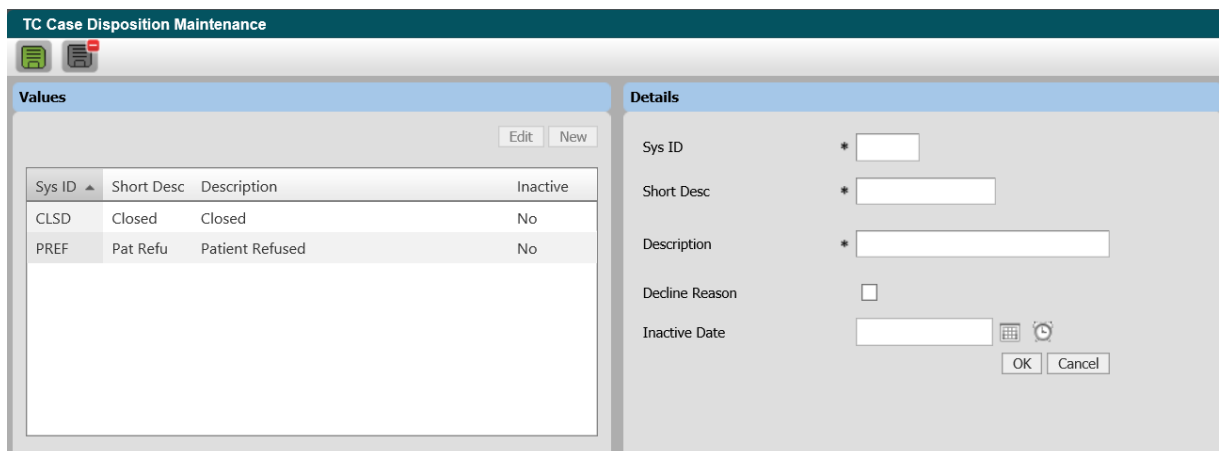
1. Select **Admin > Transfer Center > Case Disposition**.
2. To create a new case disposition, perform the following steps.
 - a. In the **Values** pane, click **New**.
 - b. Enter a description of up to four characters in the **Sys ID**.
System IDs can be alphanumeric, but ensure each is unique. After System IDs are created, they cannot be edited.
 - c. In **Description**, enter a description of the case disposition.
 - d. Select the check box for **Decline Reason** to include the decline reason if the case is declined.
 - e. If the case disposition is temporary, enter the date on which the case disposition becomes inactive.
 - f. Click **OK**, and then click the **Save** icon ().
The case disposition you created is displayed in the **Values** pane.
3. To edit an existing case disposition, perform the following steps.
 - a. In the **Values** pane, select the case disposition to edit.
 - b. Click **Edit** to view the case disposition data in the **Details** pane.
 - c. Make any required changes to the case disposition, and then click **OK**.
 - d. Click **Save**.

Figure 6: TC Case Disposition Maintenance



Create and edit Case Types

Your system administrator can create and edit Transfer Center case types that are customized for your organization.

1. Select **Admin > Transfer Center > Case Type**.
2. To create a new case type, perform the following steps.

- a. In the **Values** pane, click **New**.
- b. Enter a four-character maximum description in the **Sys ID**.

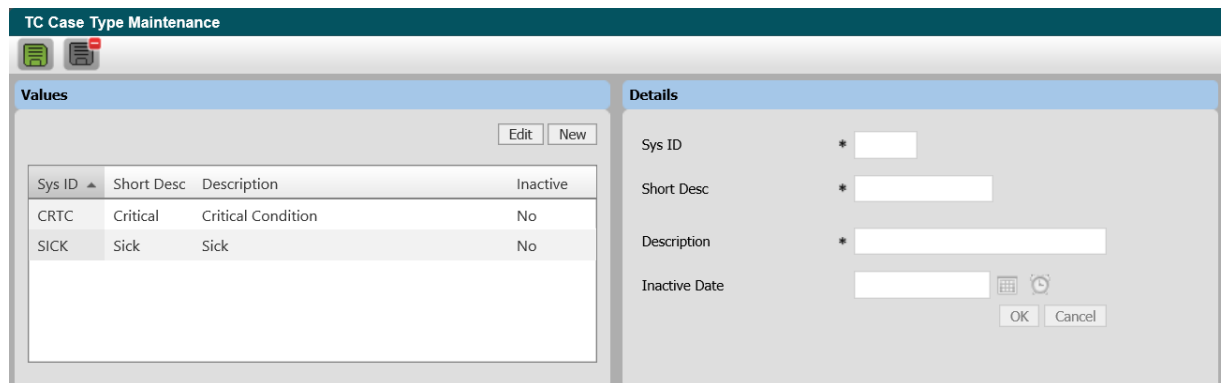
Note: System IDs can be alphanumeric. Verify that each ID is unique. After System IDs are created, they cannot be edited.

- c. In **Short Desc**, enter a short text description of up to eight characters.
- d. In **Description**, enter a description of the case type of up to eight characters.
- e. If the case type is temporary, enter the date on which the case type becomes inactive.

- f. Select **OK** and click **Save** ().
The case type you created is displayed in the **Values** pane.

3. To edit an existing case type, perform the following steps.
 - a. In the **Values** pane, select the case type to edit.
 - b. Click **Edit** to view case type data in the **Details** pane.
 - c. Make any required changes to the case type and click **OK**.
 - d. Click **Save**.

Figure 7: TC Case Type Maintenance



Create and edit Physician Call Status Reasons

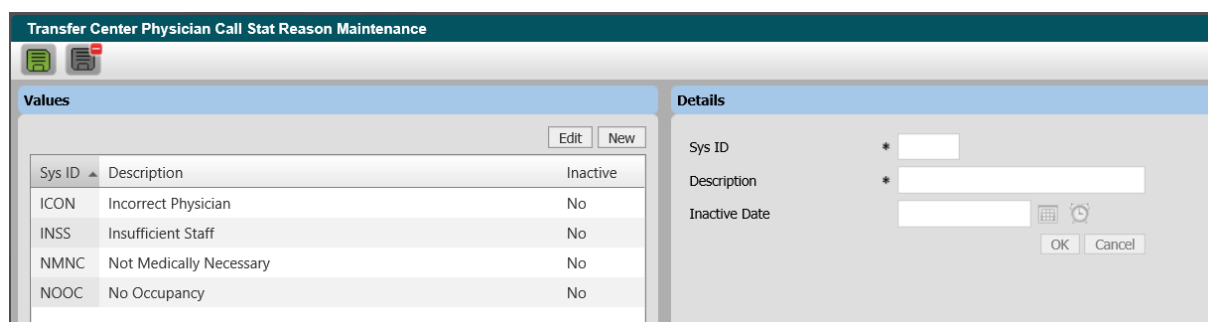
The **Physician Call Status Reason** identifies the valid list of reasons why a consulting physician might decline a case.

Select **Advanced Maint** below **User Maint** on the left navigation pane to display **Physician Call Status Reason**. The example values are Saturated Patient Load (PTLD) and Schedule prevents acceptance (SPA):

The following procedure explains how to create and edit physician call status reasons.

1. Click **Physician Call Stat Reason** on the left navigation pane.

Figure 8: Physician Call Status Reason



Sys ID	Description	Inactive
ICON	Incorrect Physician	No
INSS	Insufficient Staff	No
NMNC	Not Medically Necessary	No
NOOC	No Occupancy	No

2. Do one of the following:
 - > To create a physician call status, click **New**. The fields in the Details section are available for entering data.

Note: System IDs can be alphanumeric. Verify that each ID is unique. After System IDs are created, they cannot be edited.
 - > To edit a physician call status, double-click the item. The fields in the Details section display data and are available for editing. The Sys (System) ID box cannot be edited.
3. Enter information in the applicable fields. The fields are explained in the following table.

Box	Purpose
Sys ID*	The unique alphanumeric abbreviation of the description assigned by you, not the auto-generated description (four characters maximum) that uniquely identifies each physician call status reason.

Box	Purpose
Description*	A brief description of the physician call status reason.
Inactive Date	The date and time that the physician call status reason is inactive, if applicable. Click the Calendar icon to select the date. To change the default time that is displayed with the date, click the Time

4. When you are finished entering information, click **OK** icon and select the time. Leave the box blank if the physician call status reason must be active indefinitely.
5. Click save.

Create and edit Physician Call Statuses

The **Physician Call Status** identifies the valid list of physician call statuses that are used during the Transfer Center workflow process.

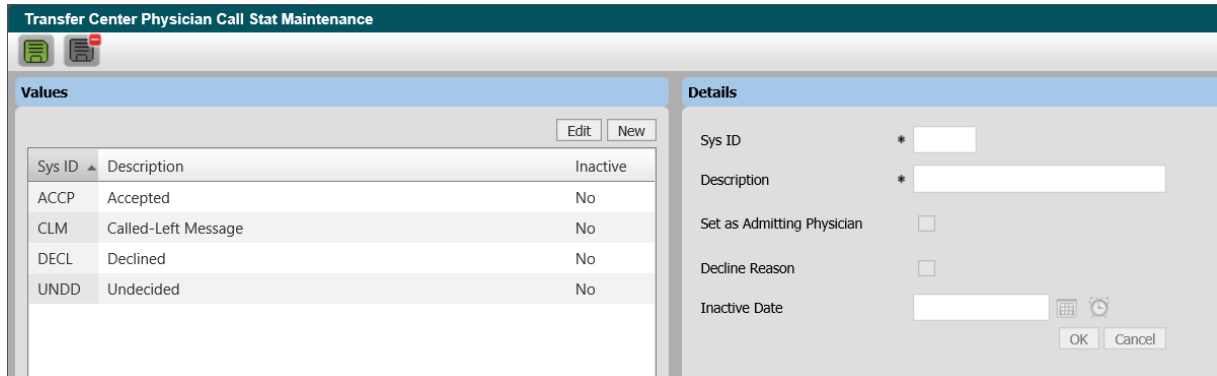
Click **Advanced Maint** below **User Maint** on the left navigation pane to display **Physician Call Status**. The example values include:

- > Accepted (ACCP)
- > Paged/Emailed (PGEM)
- > Called Left Message (CLLD)
- > Refused (RFSD)
- > Declined (DECL)
- > Saturated (SATU)
- > Not on Call (NONC)
- > Spoke To (TALK)
- > Never Responded (NRSP)
- > Waiting Callback (WCBK)

The following procedure explains how to create and edit physician call statuses.

1. Click **Physician Call Stat** on the left navigation pane.

Figure 9: Physician Call Status



2. Do one of the following:
 - > To create a physician call status, click **New**. The boxes in the Details section are available for entering data.

Note: System IDs can be alphanumeric. Verify that each ID is unique. After System IDs are created, they cannot be edited.
 - > To edit a physician call status, double-click the item. The boxes in the Details section display data and are available for editing. The Sys ID box cannot be edited.
3. Enter information in the applicable boxes. The boxes are explained in the following table.

Box	Purpose
Sys ID*	The unique alphanumeric abbreviation of the description assigned by you, not the auto-generated description (four characters maximum) that uniquely identifies each physician call status.
Description*	A brief description of the physician call status.
Display Sequence*	Determines the order of physicians on the Transfer Center Worklist window. Based on their current status, the physicians must be ordered using this numerical sequence.
Closing Status	Click this box to insert a check mark if this status closes the current call to this physician.

Box	Purpose
Requires Reason	Click this box to insert a check mark if setting this status for the call requires an associated reason code to be selected.
Display On Worklist	Click this box to insert a check mark if physicians in this status are shown on the Transfer Center Worklist window.
Inactive Date	The date and time that the physician call status is inactive, if applicable. Click the Calendar icon to select the date. To change the default time that is displayed with the date, click the Time icon and select the time. Leave the box blank if the physician call status must be active indefinitely.

4. When you are finished entering information, click **OK**.
5. Click save.

Create and edit Source Type


Your system administrator can create and edit Transfer Center source types that are customized for your organization.

1. Select **Admin > Transfer Center > Source Type**.
2. To create a new source type, perform the following steps.

- a. In the **Values** pane, click **New**.
- b. Enter a description of up to four characters in the **Sys ID**.

Note: System IDs can be alphanumeric. Verify that each ID is unique. After System IDs are created, they cannot be edited.

- c. In **Description**, enter a description of the source type.
- d. If the source type is temporary, enter the date on which the source type becomes inactive.

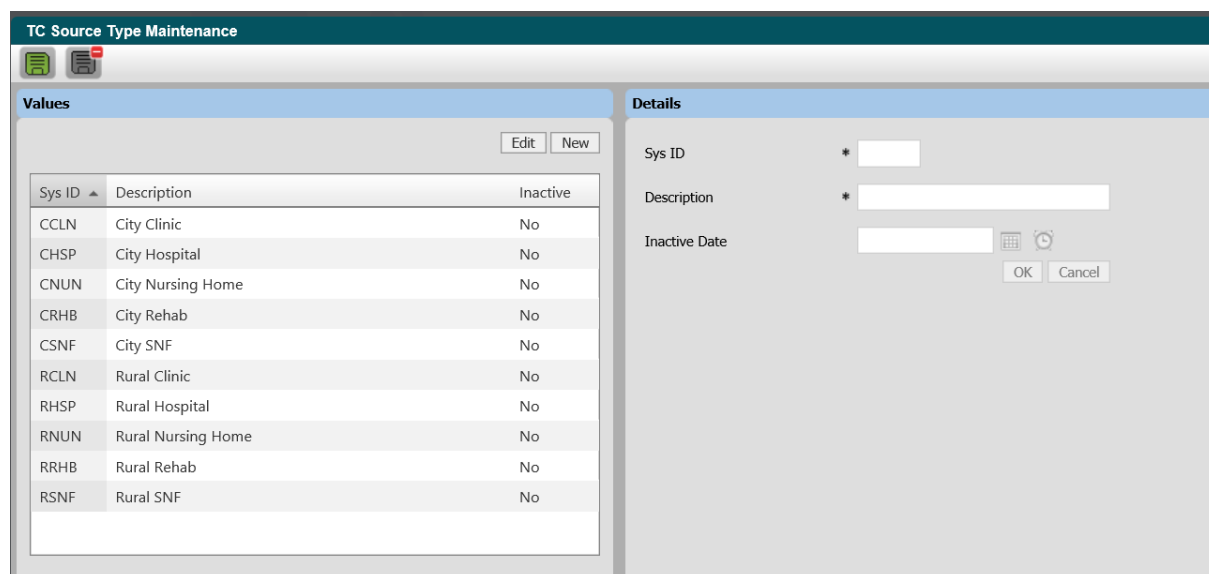
- e. Select **OK** and click **Save** ().

The source type you created is displayed in the **Values** pane.

3. To edit an existing source type, perform the following steps.

- a. In the **Values** pane, select the source type to edit.
- b. Click **Edit** to view the source type data in the **Details** pane.
- c. Make any required changes to the source type and click **OK**.
- d. Click **Save**.

Figure 10: TC Source Type Maintenance



Sys ID	Description	Inactive
CCLN	City Clinic	No
CHSP	City Hospital	No
CNUN	City Nursing Home	No
CRHB	City Rehab	No
CSNF	City SNF	No
RCLN	Rural Clinic	No
RHSP	Rural Hospital	No
RNUN	Rural Nursing Home	No
RRHB	Rural Rehab	No
RSNF	Rural SNF	No

Create and edit Source Locations

Your system administrator can create and edit Transfer Center source locations that are customized for your organization.

1. Select **Admin > Transfer Center > Source Location**.
2. To create a new source location, perform the following steps.
 - a. In the **Values** pane, click **New**.
 - b. Enter a description of up to four characters in the **Sys ID**.

Note: System IDs can be alphanumeric. Verify that each ID is unique. After System IDs are created, they cannot be edited.

- c. In **Name** enter a description of the source location.
- d. Select the **Source Type**.
- e. Select the **Region**.
- f. Select the **Medical Groups**


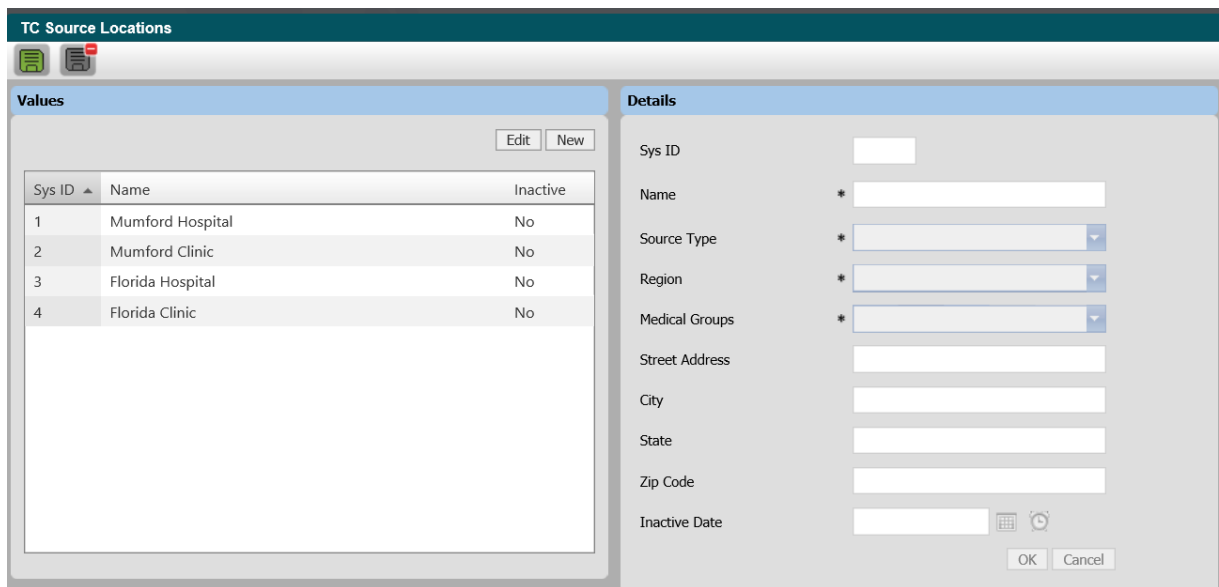
- g. Enter the address information.
 - h. If the source location is temporary, enter the date on which the source location becomes inactive.
 - i. Click **OK**, and then click **Save** ().
The source location you created shows up in the **Values** pane.
3. To edit an existing source location, perform the following steps.
- a. In the **Values** pane, select the source location to edit.
 - b. Click **Edit** to view the source location data in the **Details** pane.
 - c. Make any required changes to the source location and click **OK**.
 - d. Click **Save**.

Figure 11: TC Source Locations Maintenance



Chapter 3

Using the Transfer Center Worklist

Functions on the Transfer Center Worklist window

By default, the Transfer Center Worklist displays all open transfer center cases. You can sort and filter the types of cases that are displayed.

You can perform various functions on the Transfer Center Worklist window. The functions are explained in the following sections.

Open and close rows

You can customize how much data you see at one time on the Transfer Center Worklist by either opening or closing rows of patient data.

On the **Transfer Center Worklist** window, the patient rows are collapsed and display only summary details, such as the Case and Patient Information, Visit Reason, and Provider. Double-click the specific patient row to open it and display more details, such as Patient Details, Physician Consult,

and Notes. Close the row by clicking **Cancel** or **Save and Close**. The following figures illustrates the information that is displayed in closed and opened rows.

Figure 12: Transfer Center Worklist Closed Rows

Closed Case Worklist						
Closed Cases +						
Case Disposition	Patient Information	Visit Reason	Provider	Placement Info	Case Owner	Actions
CD1 BRO21J 10/27/2018 11:51 Sick	8/1/1985 (33y) Female	Appendicitis	Accepted 10/26/2018 15:07	Reserved to Facility COM 10/26/2018 15:07		Actions
CD1 SAD21R 10/27/2018 11:51 Sick	10/9/1974 (44y) Male	headache	Accepted 10/26/2018 10:16	Reserved to Facility UNV 10/26/2018 16:11		Actions

Figure 13: Transfer Center Worklist Open Rows

Transfer Center Open Case Details				
Case Info				
Case Type * URGENT	Case Owner	Source * Raleigh Clinic	Caller's Name *	Caller's Phone *
Patient Info				
Last Name *	First Name *	Birthdate	Age	Gender * Male
Visit Reason Sick				

Use tabs and filters to display information

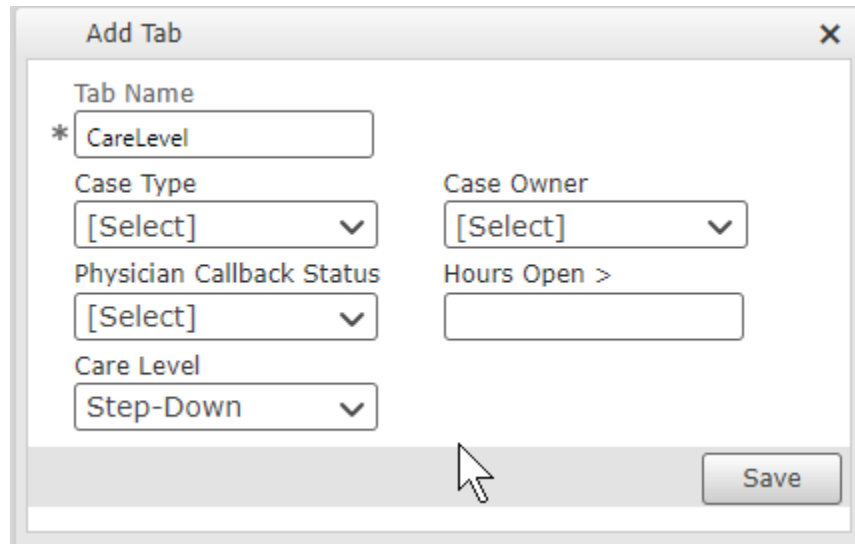
Use the Transfer Center module to create and save reusable custom filters that make searching for cases easier.

By default, the **Open Cases** tab shows all the open cases with no filtering applied. Use the **Transfer Center Worklist** to add a new tab to filter out patient data and display only the data that you want to view. Select the plus icon on the **Transfer Center Worklist** to create new tabs. When naming the new tab, you must select filter criteria for the active boxes. Patients who do not meet the specified criteria are filtered out and are not displayed on the new tab.

The fields that are displayed on **Edit Tab** depend on the settings that are associated with your user profile. The filtering is not mandatory. For example, to filter for cases with a **Called-Left**

Message status, make that selection from the **Physician Callback Status** field and leave the other fields blank.

Figure 14: Transfer Center Filters



When you click **Save** on **Edit Tab**, the window closes and only cases that match the criteria entered are displayed on the **Transfer Center Worklist**. The tab is saved and is displayed on your view of that window whenever you access it. The tab is not displayed to other users. If you no longer need the tab, you can delete it by pointing to the name and clicking the "x". To view all patients on the window (unfiltered), click the **Open Cases** tab. If no patients match the filter criteria, the statement `No records to display` displays.

Create a filters tab

You can create a tab with customized filters and save it to make searching faster in the future.

1. Select the plus sign icon to add a new tab.

Add Tab opens.

Figure 15: Worklist Add Tab

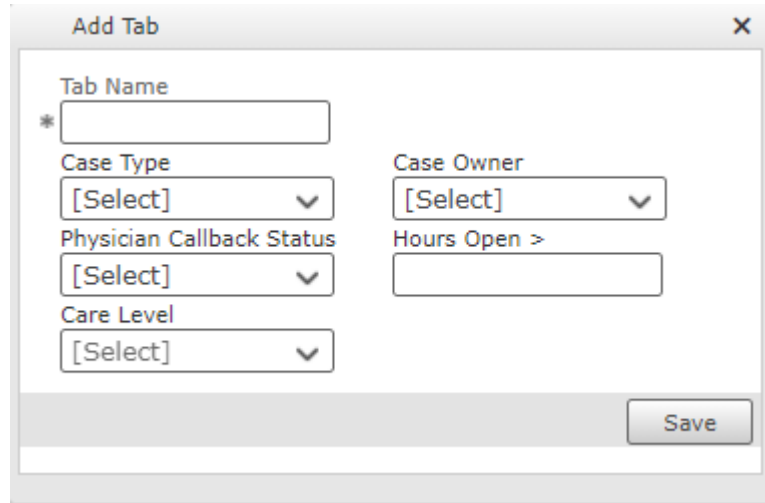
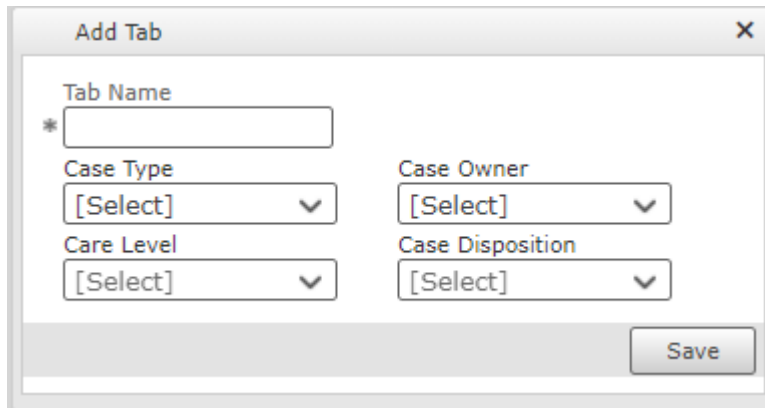


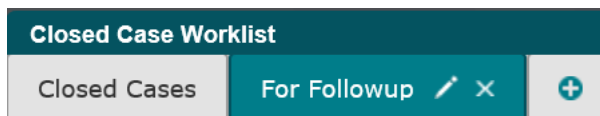
Figure 16: Closed Case Worklist Add Tab



2. Enter the **Tab Name**.
3. Select filter options as needed, and then click **Save**.


The new tab is displayed to the right of the existing tabs.

Figure 17: New Worklist Tab



Edit or delete a filters tab

You can edit or delete a customized worklist tab that was created previously.

1. Point to the tab to reveal the edit and delete icons, respectively .
2. To delete a tab, click **Delete**, and then click **Yes** to confirm the deletion of the tab.
3. To edit a tab, perform the following steps:
 - a. Click the pencil icon to open **Edit Tab** and make any necessary changes.

Note: You can also change the name of the tab by typing changes directly in the **Tab Name** box.

- b. Click **Save**. The patients that meet the new criteria are displayed on the **Transfer Center Worklist**.

Create Transfer Center cases

This section describes the process for initiating a transfer center case.

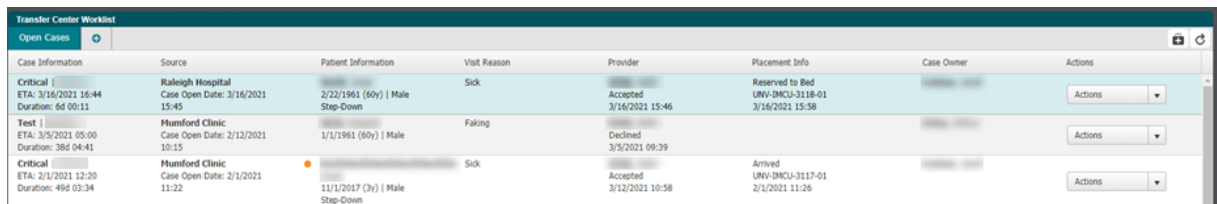
After an organization's system administrator has configured the Transfer Center for use, users can perform the following procedures to initiate a transfer case and take it through the existing workflows to interact with the Bed Management Module.

Create new Transfer Center cases

Assign patients to facilities, units, or beds during the patient intake process.

1. From the left navigation pane, click **Transfer Center**.

Figure 18: Transfer Center Worklist



Case Information	Source	Patient Information	Visit Reason	Provider	Placement Info	Case Owner	Actions
Critical ETA: 3/16/2021 16:44 Duration: 6d 00:11	Raleigh Hospital Case Open Date: 3/16/2021 15:45	2/22/1961 (60y) Male Step-Down	Sick	Accepted 3/16/2021 15:46	Reserved to Bed UNV-IMCU-3118-01 3/16/2021 15:58		Actions
Test ETA: 3/5/2021 05:00 Duration: 38d 04:41	Humford Clinic Case Open Date: 2/12/2021 10:15	1/1/1961 (60y) Male	Faking	Declined 3/5/2021 09:39			Actions
Critical ETA: 2/1/2021 12:20 Duration: 49d 03:34	Humford Clinic Case Open Date: 2/1/2021 11:22	11/1/2017 (3y) Male Step-Down	Sick	Accepted 3/12/2021 10:58	Arrived UNV-IMCU-3117-01 2/1/2021 11:26		Actions

- Click  (Add Case).

Figure 19: Transfer Center Open Case Details

- Enter all required information, as indicated by asterisks, along with other supplemental information.
- Click **Save**. The patient details are recorded, and the **Physician Consult** and **Notes** tabs are enabled.
- Click the **Physician Consult** tab, and then click **New** to review the list of available physicians.
- In **Physician** select the physician you contacted about the transfer.

Note: You can start entering the physician's name in **Physician** to narrow the list of options.

- Record the method of contact and the physician's call-back status, along with any notes, and then click **Save**.

Note: Notes are saved to the **Notes** tab with the most recent note at the top of the list.

- After the physician accepts the case, locate the case in the **Transfer Center Worklist** and select **Actions > Edit Case**.

Figure 20: Transfer Center Open Case Actions

Case Information	Patient Information	Visit Reason	Provider	Placement Info	Case Owner	Actions
TCTM POT213 10/24/2018 14:54 00:10	7/30/1984 (34y) Male	high fever, hallucinations	Phy Call Stat 1 10/24/2018 15:03			Actions Edit Case Add a Note Consultation Change Owner Case Disposition Print Face Sheet

- Navigate to the **Physician Consult** tab, click **New**, and select the same physician from the list.

10. Select the new physician call-back status and click **Save**.

Note: Alternatively, select **Consultation**, select the physician and call-back status from the list, and then add any notes.

11. Click **Search** to open **Transfer Center Bed Search**.

Figure 21: Bed Search Results without TCBF enabled

Transfer Center Bed Search

Patient Information

10/9/1974 (44y) | Male

Filters

Care Level

Med-Surg

Care Service

General Surgery

Filter By Gender

Regions

AHN RGN

Facility

UNV

Patient Attributes

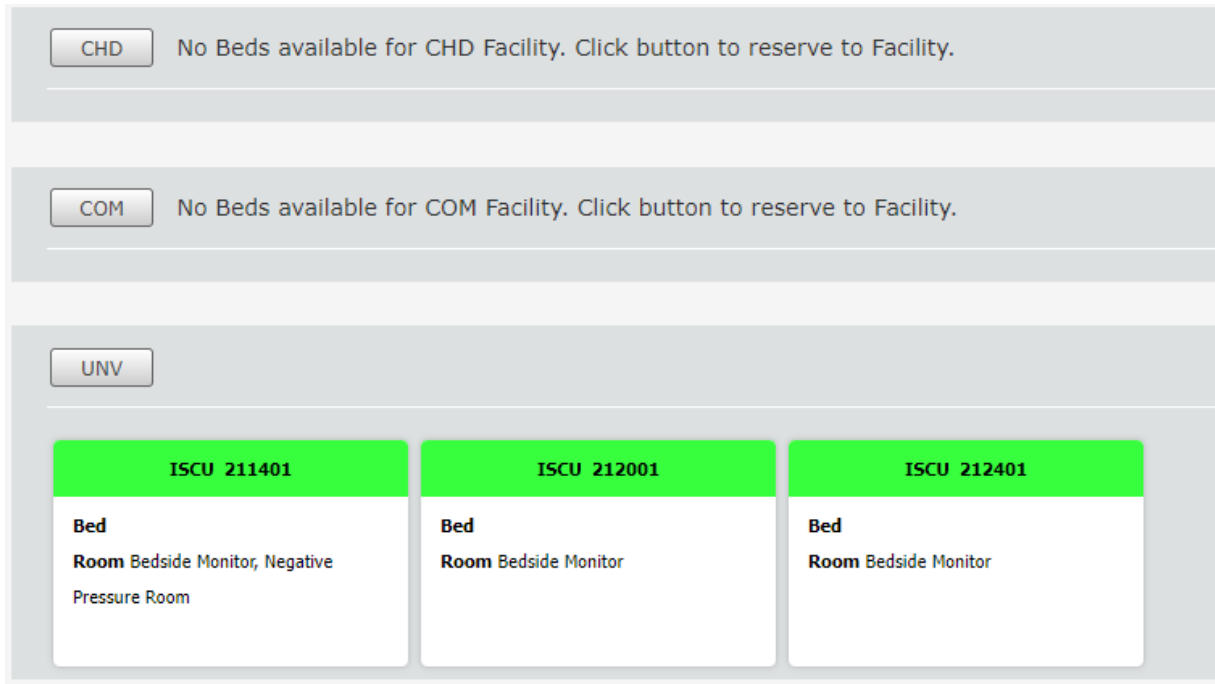
Room/Bed Attributes

UNV

SURG 212601	SURG 213101	SURG 213201	SURG 213501	SURG 213601
Bed Room	Bed Room	Bed Room	Bed Room Negative Pressure Room	Bed Room Negative Pressure Room

If **TCBF - Allow Reserve to Hospital when no beds are available** is enabled your search results might include hospitals that currently do not have beds.

Figure 22: Bed Search Results with TCBF enabled



The screenshot displays a search interface with three facility status sections:

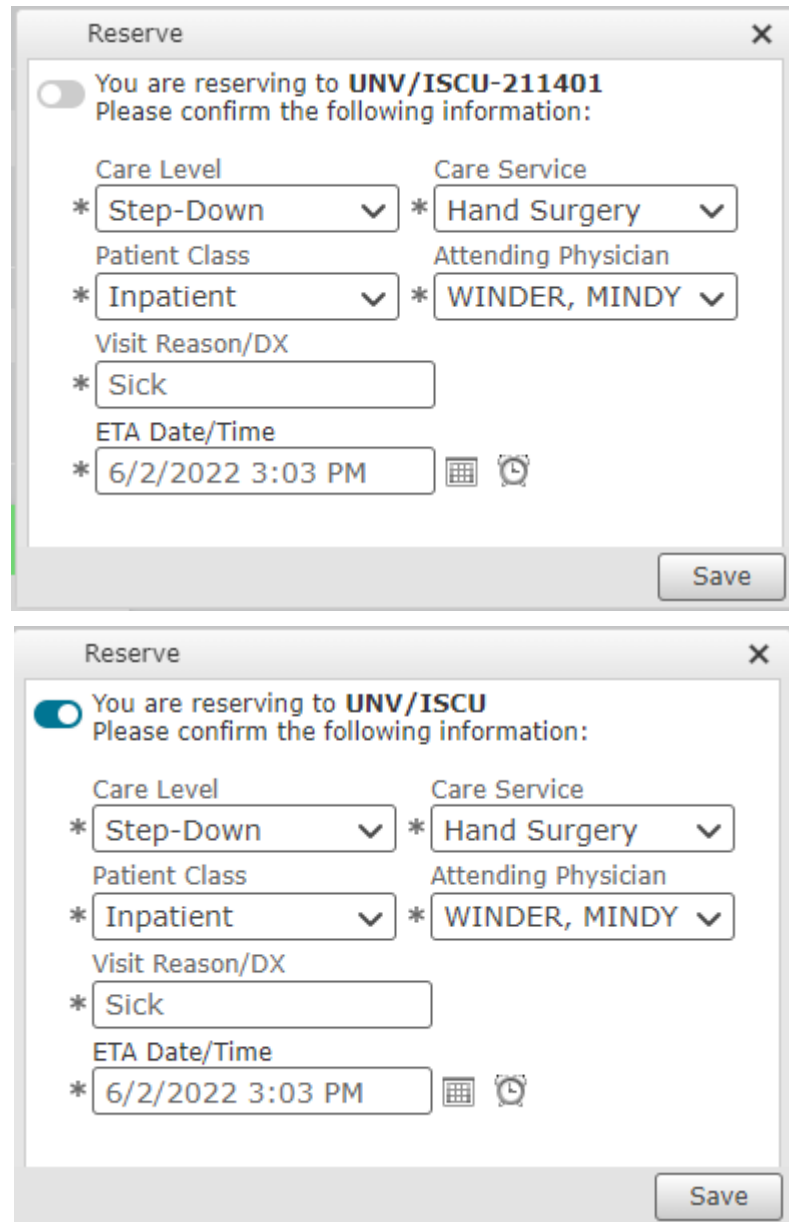
- CHD:** A button labeled "CHD" is followed by the text "No Beds available for CHD Facility. Click button to reserve to Facility."
- COM:** A button labeled "COM" is followed by the text "No Beds available for COM Facility. Click button to reserve to Facility."
- UNV:** A button labeled "UNV" is followed by three columns of available beds:

ISCU 211401	ISCU 212001	ISCU 212401
Bed	Bed	Bed
Room Bedside Monitor, Negative Pressure Room	Room Bedside Monitor	Room Bedside Monitor

- 12 Select the applicable reservation location by clicking the open (green) bed icon (reserve to bed) or the facility icon (reserve to facility).

- On **Reserve**, if your administrator enabled **TCUB - Allow Reserve to Bed or Unit** you can click the toggle to switch from unit to bed and vice versa.

Figure 23: Toggle between bed and unit



The figure shows two screenshots of the 'Reserve' form. The top screenshot shows the form with a toggle switch set to 'UNV/ISCU-211401'. The bottom screenshot shows the form with the toggle switch set to 'UNV/ISCU'. Both screenshots show the following fields:

- Care Level:** * Step-Down
- Care Service:** * Hand Surgery
- Patient Class:** * Inpatient
- Attending Physician:** * WINDER, MINDY
- Visit Reason/DX:** * Sick
- ETA Date/Time:** * 6/2/2022 3:03 PM

A 'Save' button is located at the bottom right of each form.

- Enter data on **Reserve** and click **Save**.
- Click **Save** to return to the **Transfer Center Worklist**.

The patient is listed on the **Bed Management Worklist** and the **Unit View**.

Figure 24: Transfer Center Bed Request on Bed Management Worklist

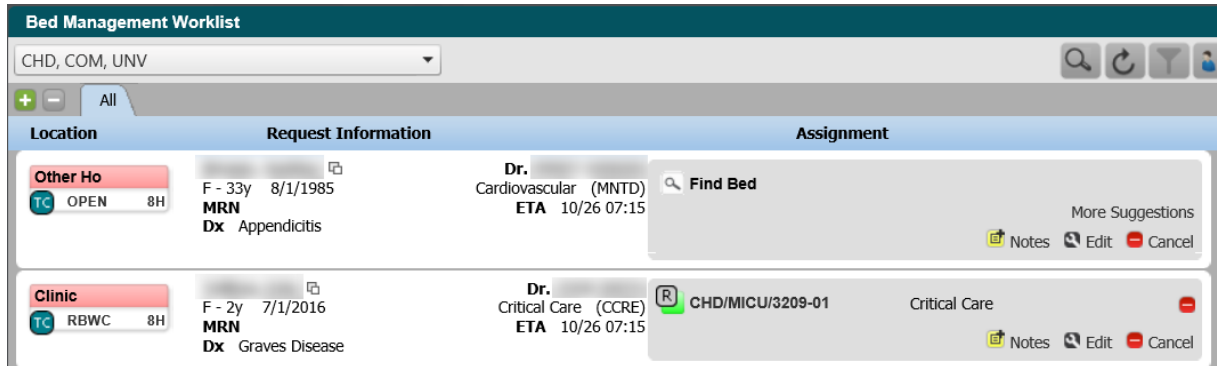
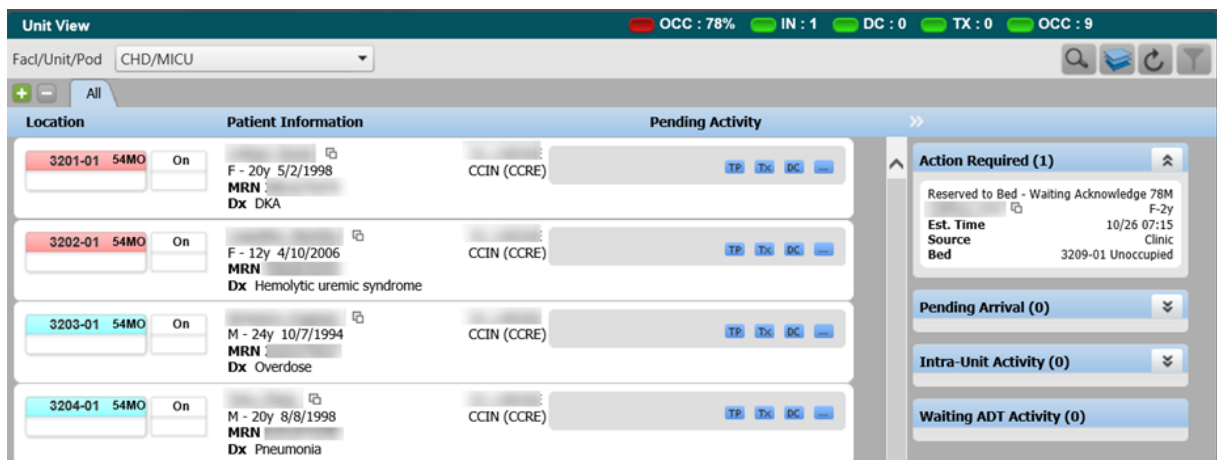


Figure 25: Transfer Center Bed Request on Unit View



Note: A Direct Admit that was created by reserving to the Transfer Center Case is tagged with the teal TC icon to distinguish it from regular Direct Admits. Also, the acknowledgment rules governing the progression of the workflow state from **Reserved to Bed - Waiting AcknowledgmentReserved to Bed** is the same as the other workflows.

Edit Transfer Center cases

Modify an existing Transfer Center case with an open status.

1. From the left navigation pane, click **Transfer Center**.

2. Navigate to the open case on **Transfer Center Worklist**.

Figure 26: Transfer Center Worklist

Case Information	Source	Patient Information	Visit Reason	Provider	Placement Info	Case Owner	Actions
Critical ETA: 3/16/2021 16:44 Duration: 6d 00:11	Raleigh Hospital Case Open Date: 3/16/2021 15:45	2/22/1961 (60y) Male Step-Down	Sick	Accepted 3/16/2021 15:46	Reserved to Bed URV-3118-01 3/16/2021 15:58	[Redacted]	Actions
Test ETA: 3/5/2021 05:00 Duration: 38d 04:41	Humford Clinic Case Open Date: 2/12/2021 10:15	1/1/1961 (60y) Male	Faking	Declined 3/5/2021 09:39		[Redacted]	Actions
Critical ETA: 2/1/2021 13:29 Duration: 49d 03:34	Humford Clinic Case Open Date: 2/1/2021 11:22	11/1/2017 (3y) Male Step-Down	Sick	Accepted 3/12/2021 10:58	Arrived URV-3117-01 2/1/2021 11:26	[Redacted]	Actions

3. Click **Actions > Edit Case** or double-click the row.

Figure 27: Transfer Center Open Case Details

Transfer Center Open Case Details

Case Info

Case Type: * URGENT (dropdown)
Case Owner: [Redacted] (dropdown)
Source: * Raleigh Clinic (dropdown)
Caller's Name: * [Redacted] (text field)
Caller's Phone: * [Redacted] (text field)

Patient Info

Last Name: * [Redacted] (text field)
First Name: * [Redacted] (text field)
Birthdate: [Redacted] (calendar icon)
Age: [Redacted] (text field)
Gender: * Male (dropdown)
Visit Reason: Sick (text field)

4. Enter information in the applicable fields.

Note: Some fields are pre-filled with information from previous windows and some require you to select a value. Patient detail fields are configured when Transfer Center elements are set up. Refer to the Administrators Guide for more information.

Field	Purpose
Patient Details Section	
Care Level	To change the existing information select the expected care level.
Care Service	To change the existing information select the care service required for the patient placement.
Patient Class	To change the existing information select the patient class required for the patient placement.
Security	Select the applicable patient protection plan and policies.
Patient Mobility	Select the patient's needs for mobility assistance equipment.
Disability	Select the applicable patient disability.
Patient Condition	Select the applicable patient condition level.

Field	Purpose
Confidentiality	Select the applicable patient confidentiality details.
Fall Risk	Determine the patient's risk of falling to prevent falls from occurring.
Contact Isolation	Select a contact isolation.
Droplet Isolation	Select a droplet isolation.
Airborne Isolation	Select an airborne isolation.
Telemetry	Select if the patient needs to be monitored and requires special equipment.
Physician Consult and Notes Sections	
Physician	Select the physician from the populated choices. Note: You can start entering the physician's name in Physician to narrow the list of options.
Physician Callback Status	Select the status of the physician contact.
Decline Reason	Select the reason that the consult was declined.
Status Date Time	The date and time of the case status.
Username	The name of the transfer center user who initiated the case.
Note	Enter any comments or notations for the request.

5. Click **Save** or **Save and Close** to return to the Transfer Center Worklist.

Close active cases

Close completed Transfer Center cases. The user who closes a case will be identified in a case note on the Notes tab.

1. From the left navigation pane, click **Transfer Center**.
2. Navigate to the applicable case on **Transfer Center Worklist**.
3. Click **Actions > Case Disposition** and enter the disposition and the **Case Decline** reason, if required.

4. Add a note on **Case Disposition**, if applicable. This note will display after the "case closed by note".

Figure 28: Closed Case Disposition Notes

Username	Status Date Time	Note Type	Note
	6/2/2022 14:08	Disposition	Disposition completed by: - The patient has arrived and placed in Bed 15CU-21140-01
	6/2/2022 14:05	Ad-Hoc	Note, Add a note here from the Notes tab.

5. Click **Save**, and then **Yes** at the prompt to complete the case.
6. You can select **View Case** from the **Actions** list or double-click the case row to open the case details.

Figure 29: Closed Case Details

Transfer Center Closed Case Details

Case Info

Case Type: Routine

Case Owner:

Source: Raleigh Clinic

Caller's Name:

Caller's Phone:

Patient Info

Last Name: First Name:

Birthdate: 8/19/1982 Age: 39y Gender: Female

Visit Reason: Sick

Care Level, Care Service and Patient Class

Care Level: Step-Down Care Service: Hand Surgery Patient Class: Inpatient

Patient Safety

Security: [Select] Patient Mobility: [Select] Disability: [Select] Patient Condition: [Select] Confidentiality: [Select] Fall Risk: [Select]

Ring Fencing

Personal Preference

Patient Preference: [Select]

Isolation

Contact Isolation: [Select] Droplet Isolation: [Select] Airborne Isolation: [Select] Chemotherapy

Financial

Insurance: [Select] Bad Debt Code: [Select]

Demographics

Patient Type: [Select]

Patient Needs

Search | Save and Close | Save | Cancel

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 Transfer Center User Guide
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32

Chapter 4

Transfer Center Closed Case Worklist

Closed Case Worklist

Use the **Closed Case Worklist** to display all the transfer center cases that were closed within the last 24 hours. These closed cases no longer display on the **Transfer Center Open Cases Worklist**.

For each closed case, you can select actions to do the following:

- > View the case
- > Add a Note
- > Add a Physician Consult
- > Edit Disposition
- > Print the face sheet

Alternatively, you can double-click a closed case to view the details.

Figure 30: Transfer Center Closed Case Worklist Actions

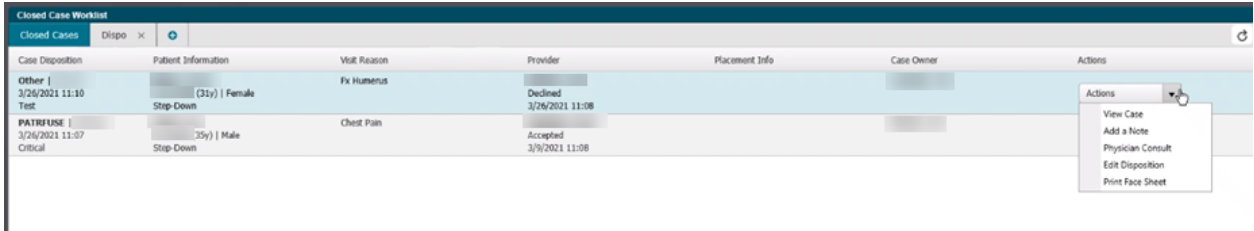


Figure 31: Closed Case Details

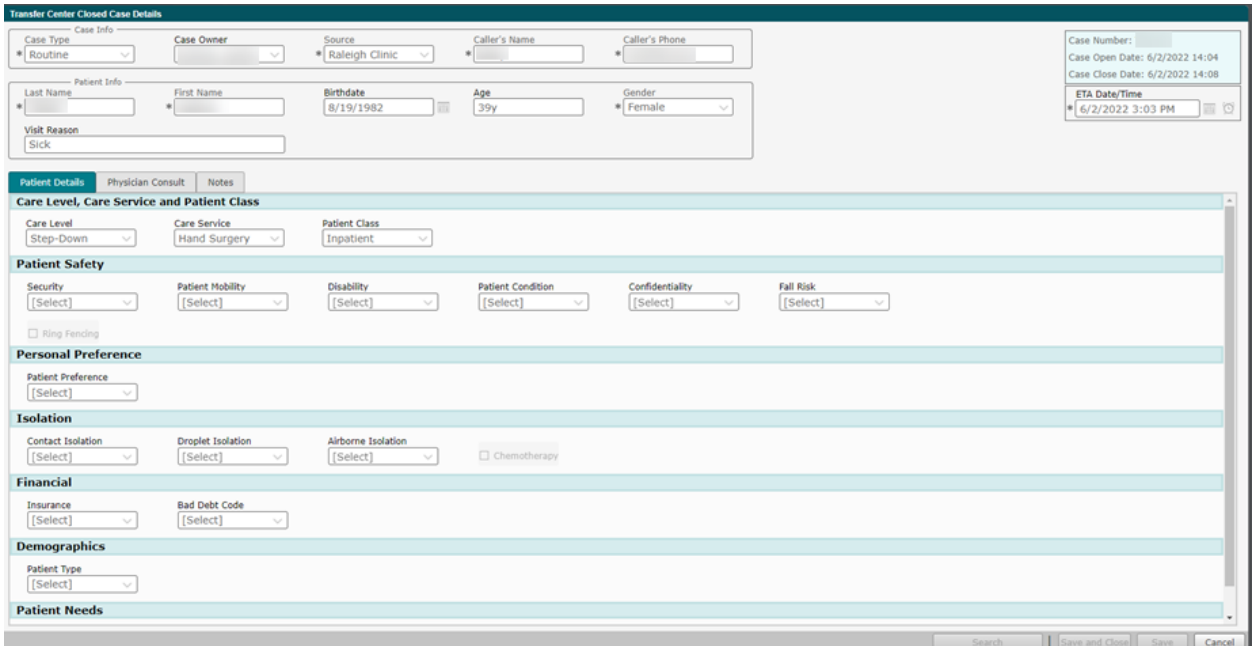


Figure 32: Face Sheet

Reports - Transfer Center Reports - Face Sheet without Notes

⏪ < 1 of 1 > ⏩
↺ ↻ ↻
100%
📄
🖨
Find | Next

Face Sheet

Case Number [REDACTED]
 Date 6/2/2022 13:11

SECTION I - CASE INFORMATION

Case Info

Case Type	Case Owner	Source	Caller's Name	Caller's Phone
URGENT	[REDACTED]	Raleigh Clinic	[REDACTED]	[REDACTED]

Patient Info

Patient Name	Gender	Date of Birth
[REDACTED]	Male	Unknown

Visit Reason
Sick

SECTION II - PATIENT DETAILS

Care Level, Care Service and Patient Class

Care Level	Step-Down
Care Service	Internal Medicine
Patient Class	Inpatient

Patient Attributes

Attribute Group	Attributes	Attribute Values

Click **Cancel** to return to the **Closed Case Worklist**.

Search closed case workload

Use **Search Closed Cases** to find cases closed outside the default 24 hour window shown on **Closed Case Worklist**.

Search by patient name, a date range or a case ID.

Search
✕

Search Closed Cases

Last Name

First Name

From Date

To Date

CaseID

Case Type [Select]

Clear
Submit
Close

Search Closed Cases						
Results						
Case Disposition	Patient Information	Visit Reason	Provider	Placement Info	Case Owner	Actions
Other 3/26/2021 11:10 Test	(31y) Female Step-Down	fx Humerus	Declined 3/26/2021 11:08			Actions
PATRFUSE 3/26/2021 11:07 Critical	(35y) Male Step-Down	Chest Pain	Accepted 3/9/2021 11:08			Actions
Other 3/16/2021 15:16 Test	(62y) Male	Unknown	Declined 3/16/2021 15:18			Actions
OPEN ENR 3/1/2021 14:29 Test	(8y) Female	Severe Dehydration				Actions
Closed 3/1/2021 14:28 Test	(8y) Female Critical Care	Faking	Accepted 2/9/2021 06:42	Arrived CHD-CVICU-1221-01 2/9/2021 06:45		Actions
PATRFUSE 3/1/2021 14:28 Sick	(88y) Female Med-Surg	Broken foot	Accepted 2/15/2021 15:26	Cancelled Direct Admit 2/15/2021 15:55		Actions

Chapter 5

Future Admits worklist

Future Admits displays pending admissions.

For each future admission, you can select actions to do the following:

- > View the case
- > Add a Note
- > Add a Physician Consult
- > Edit Disposition
- > Print the face sheet

Alternatively, you can double-click a future admit case to view the details.

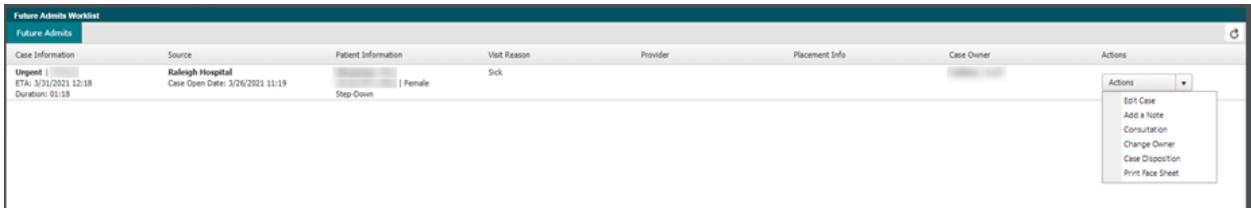
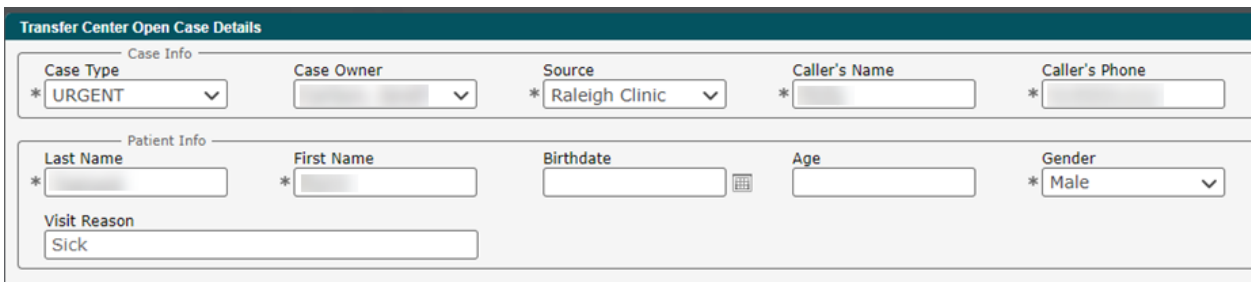


Figure 33: Transfer Center Open Case Details



For more information

For more information and the most up-to-date documentation, go to the Allscripts Central website at <https://central.allscripts.com>. You can access the Product Documentation portal from this website.

1. Sign in to the Allscripts Central website.
 - > If you have an Allscripts Central account, enter your user name and password, and click **Sign in**.
 - > If you do not have an Allscripts Central account, click **Create one** to begin creating a new account.

The Allscripts Central home page is displayed.

2. Go to **My Products > Product Documentation**.

The Product Documentation portal landing page is displayed.

The list of products under the **Product Name** box reflects your preferences in Allscripts Central Central. You can navigate to the documentation for a product using **Product Name** in conjunction with the search function.

Product tiles are also displayed and reflect your Allscripts Central preferences.

3. From **Product Name**, select the product on which to search for documentation.

Product Name uses predictive searching, so as you type the product name, the list displays only matching products. Select the correct product when it is displayed.
4. In the search box, enter search criteria.

The search box also uses predictive searching. As you type, topics that match the criteria are displayed below the search box.
5. To complete your search, perform one of the following actions:
 - > Click the magnifying glass.
 - > Select one of the topics displayed beneath the search box.

Search results are displayed in the main pane. You can use the filters in the left pane to further narrow your results. For example, you can select **Feature Guides** from **Document Type** to display only topics that are included in a feature guide.

6. Click a topic title to open the topic in the context of the book indicated by the product, version, and document type tags that are displayed beneath the title.

Note: If a topic is included in more than one book, a list of the books in which the topic is included is displayed beneath the topic title. Select the applicable book from the list. The topic opens in the context of that specific publication.

What to do next

You can navigate the Product Documentation portal using multiple methods. From the bottom of the portal landing page, click **Helpful Tips** under **Getting Started** to learn more about using the portal.

Index

A

- add **9**
 - authorization item **9**
- add roles **9**
 - Transfer Center Intake Staff **9**
- advanced maintenance **8**
 - attributes **8**
- Advanced Maintenance **14–15**
 - creating Physician Call Status **15**
 - creating Physician Call Status Reason **14**
 - editing Physician Call Status **15**
 - editing Physician Call Status Reason **14**
- Allscripts® **38**
 - accessing product documentation **38**
- attributes **8**
 - associating **8**
- authorization items **9**
 - add **9**
 - edit **9**

C

- case **24**
 - create new **24**
 - initiate **24**
- case disposition **12**
 - create **12**
 - edit **12**
- case type **13**
 - create **13**
 - edit **13**
- close **20, 31**
 - case **31**
 - row **20**
- closed case worklist **33**
- closed cases **33**
- create **11–13, 17–18, 24**
 - case **24**
 - case disposition **12**

- create (*continued*)
 - case type **13**
 - decline reason **11**
 - source location **18**
 - source type **17**
- customize **10**
 - Transfer Center Module **10**

D

- decline reason **11**
 - create **11**
 - edit **11**
- delete **24**
 - tab **24**

E

- edit **9, 11–13, 17–18, 24**
 - authorization item **9**
 - case disposition **12**
 - case type **13**
 - decline reason **11**
 - source location **18**
 - source type **17**
 - tab **24**

F

- facility request **29**
 - edit **29**
- filter **22**
 - tab **22**
- filter tab **22**
 - create **22**
- filters **21**
- functions **20**
 - transfer center worklist **20**

M

maintenance **10**
Transfer Center Module **10**

O

open **20**
row **20**

P

Physician Call Status **15**
creating **15**
editing **15**
Physician Call Status Reason **14**
creating **14**
editing **14**

S

source location **18**
create **18**

source location (*continued*)
edit **18**
source type **17**
create **17**
edit **17**

T

tabs **21**
transfer center **5, 7–8, 20**
attributes **8**
functions **20**
module **7**
Transfer Center Intake Staff **9**
add role **9**

W

worklist tabs **24**
modifying **24**