**Transition of Care (TOC) Workflow**

1. The patient was admitted to the hospital for 24 hours or more
   1. If provider receives notification of admission/discharge a PTA will be sent to the TOC task group to obtain records.
   2. The TOC task group should consist of at least 2 staff members that are trained in the workflows with access to the hospital portals.
2. Designated staff member monitors hospital portals daily for patient’s being admitted/discharged.
   1. If no portal is available and PCP is notified of an ER/Hospital admission, then the PCP will send a PTA to the TOC task group to monitor for discharge and arrange hospital discharge appt within 7-14 days of discharge. Records will be obtained via fax upon discharge. If a record release is required, then the patient should come in 2-3 days prior to the appointment to sign the record release.
3. Upon discharge, the designated staff member will print all received records for provider to review (discharge summary/instructions, consults, labs, diagnostic testing). All records will also be scanned into EHR.
4. Designated staff member or front desk will schedule the patient for hospital discharge visit within 7-14 days of discharge. (The hospital often calls our office to schedule this appointment prior to TOC Call)
   1. When the appointment is scheduled prior to the TOC Call, the front desk will task the TOC group alerting them that the patient was discharged and scheduled.
5. Designated staff member will contact the patient to complete TOC Call **within 2 business days of discharge**.
6. Designated staff member who performs the TOC Call will:
   1. Be sure the patient understands discharge instructions
   2. Confirm patient is taking medications as ordered on discharge instructions
   3. Check for orders from home health, DME, or specialist appt and ensure that the patient has been contacted or has been set up as ordered.
   4. Remind patient of the importance of keeping their hospital follow up appointment with our office.
   5. If the patient has any questions that cannot be answered, then a message will be tasks to the PCP.
7. After discharge information is confirmed with patient, designated staff member will complete the TOC MyPhrase (see below) and put it in the Intake HPI. Then generate a Telephone Call🡪Medical Question and use the MyPhrase via Notes in the My Phrase Type stating “TOC Call completed. See the Intake HPI for details”.

**MyPhrase for TOC (to be put in Intake HPI):**

TOC from:

Admit date:

Discharge date:

TOC call date:

Hospital follow-up appt date:

1. Patient understands permitted activity level:

2. Patient understands dx of:

3. Patient understands self-care instructions:

4. Patient understands the medications:

5. Did patient receive any immunizations while in the hospital:

6. Patient had the following tests done while in the hospital:

7. Follow up tests:

8. Home Health or Social Services:

9. Patient knows to call us with questions/problems, and I provided our after-hours phone number or they can call the office for the after-hours number.

1. Designated staff member will then open an intake under the visit type “chart update”

A screenshot of a computer

Description automatically generated

1. Designated staff member will locate the medications panel, add/reconcile medications per protocol according to the discharge document.

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1. Designated staff member will then click **transitioning into care** and **summary of care received** boxes. Then click OK

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1. Graphical user interface, text, application

   Description automatically generatedOnce completed, the designated staff member will scroll to the bottom and click “generate intake note”

Approved by PAT 9/13/22

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