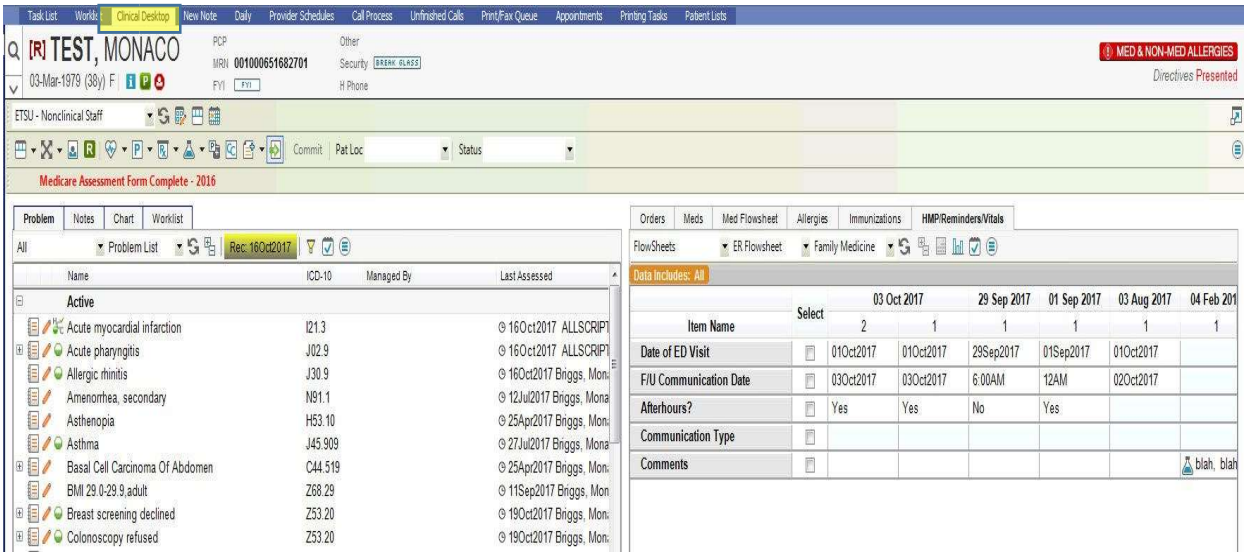
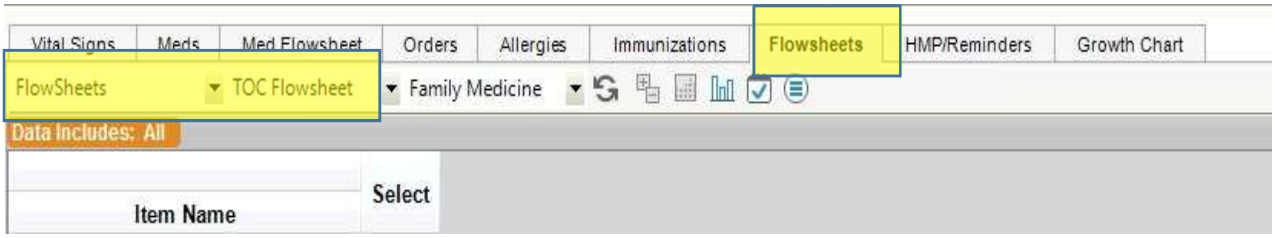
TOC Flowsheet Process

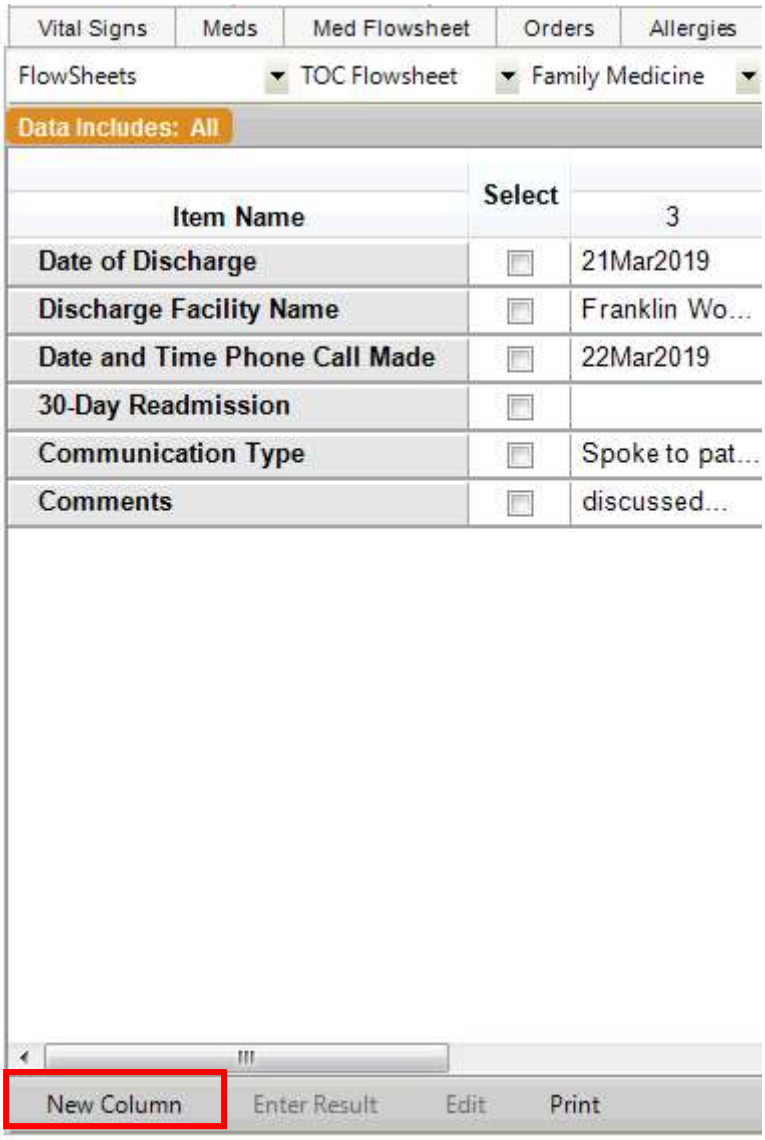
1. Identified staff is notified via task list, hospital report, etc. of a patient hospitalization.
2. Identified staff will open the patient's chart and go to the **clinical desktop**.

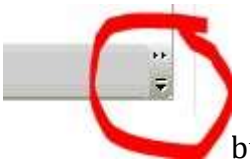


3. Next, go to the **Flowsheets tab** and change the next dropdown to **TOC Flowsheet.**



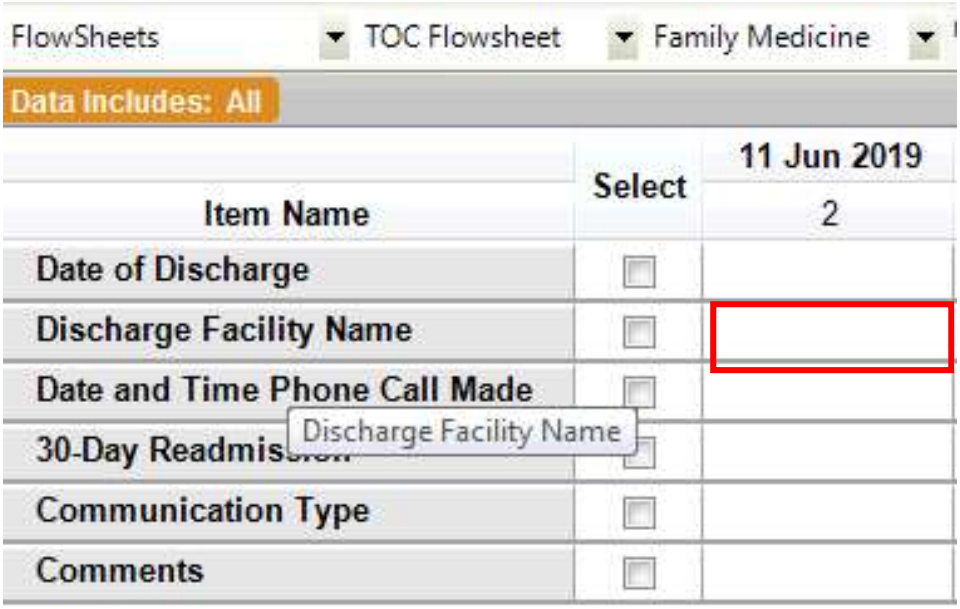
4. Once on the TOC flowsheet, click on the **New Column** button on the bottom toolbar.

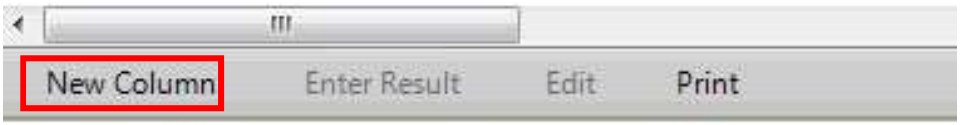




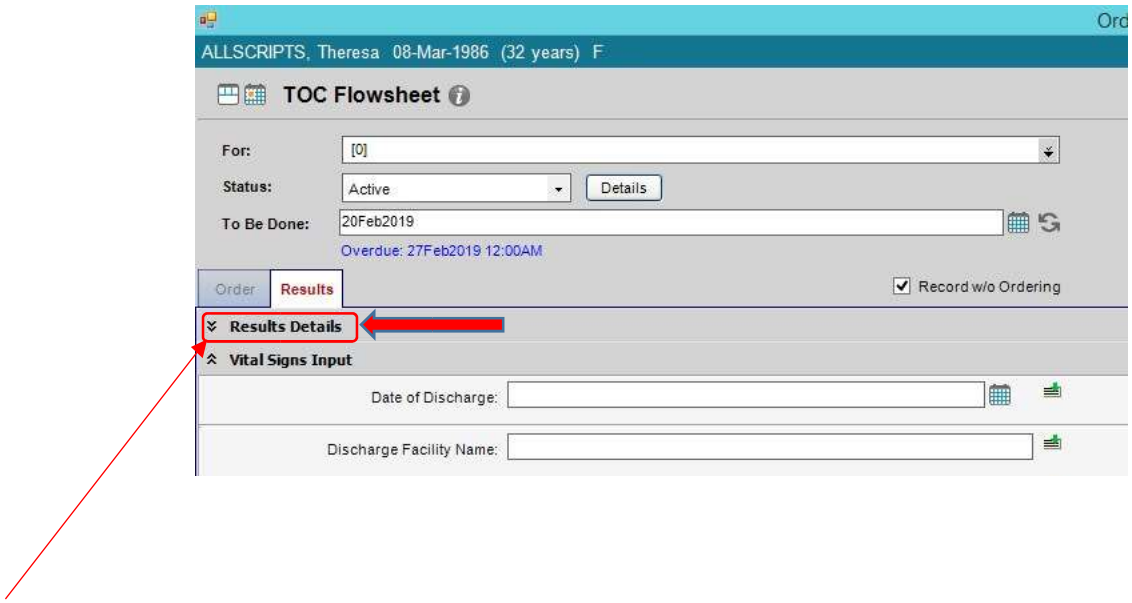
*You may need to click on the button (bottom, right side) before you see New Column and Enter Result.

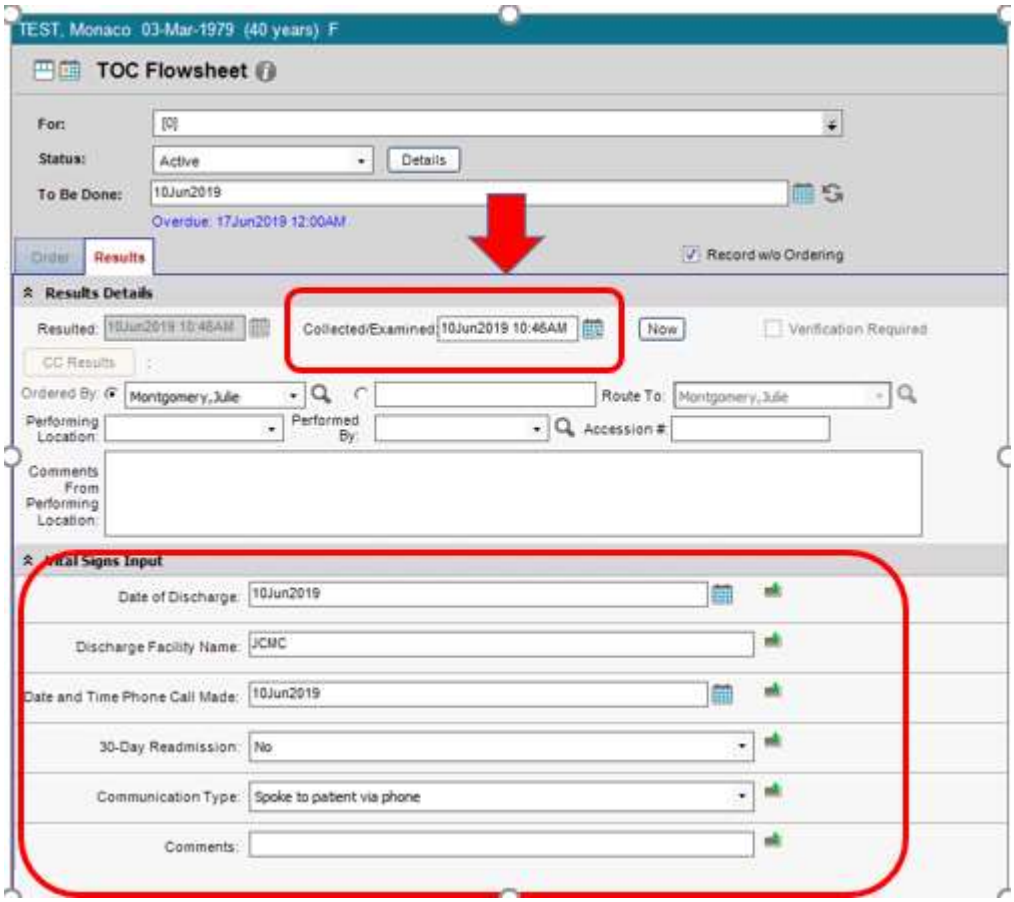
5. Click in one of the empty boxes and choose **Enter Result.**

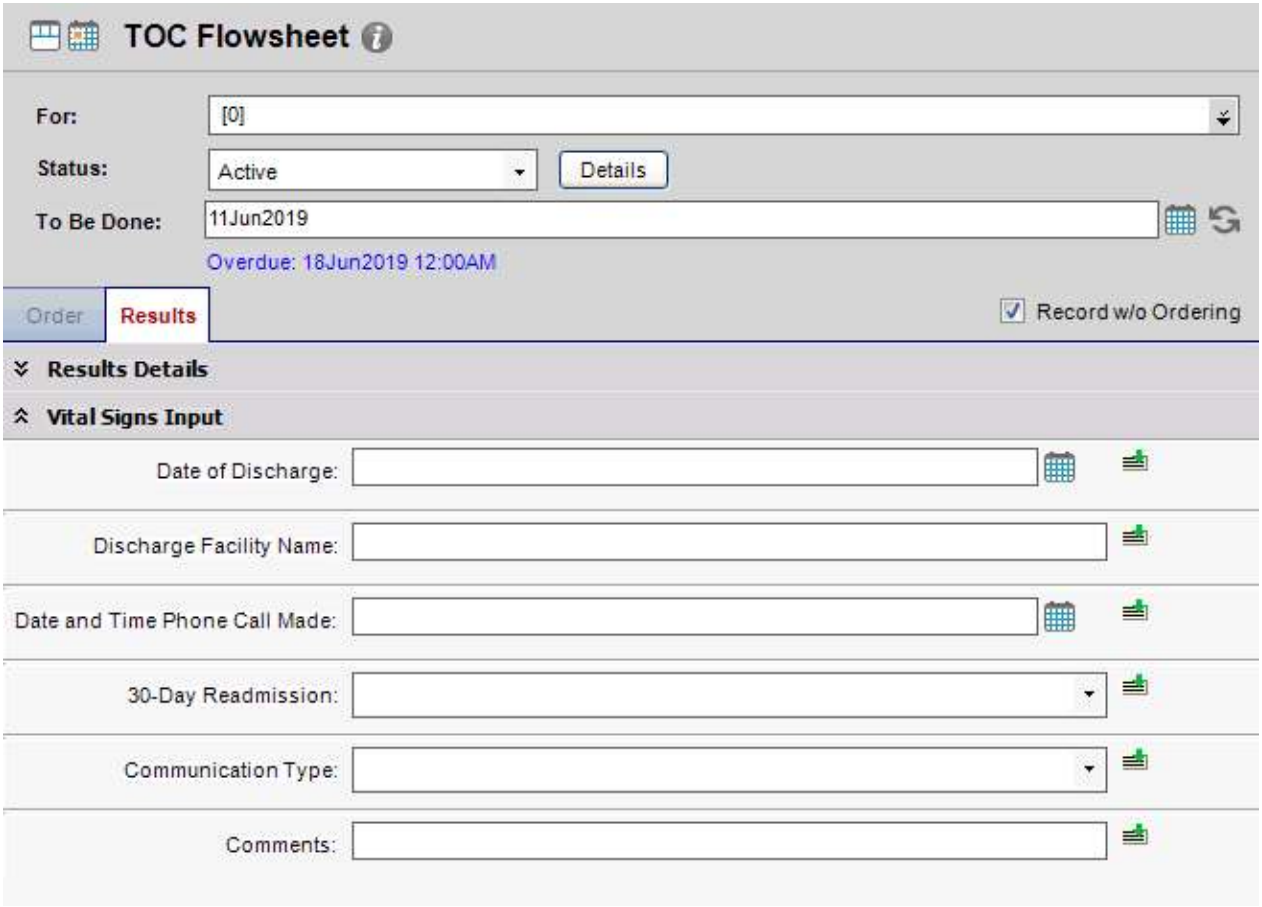




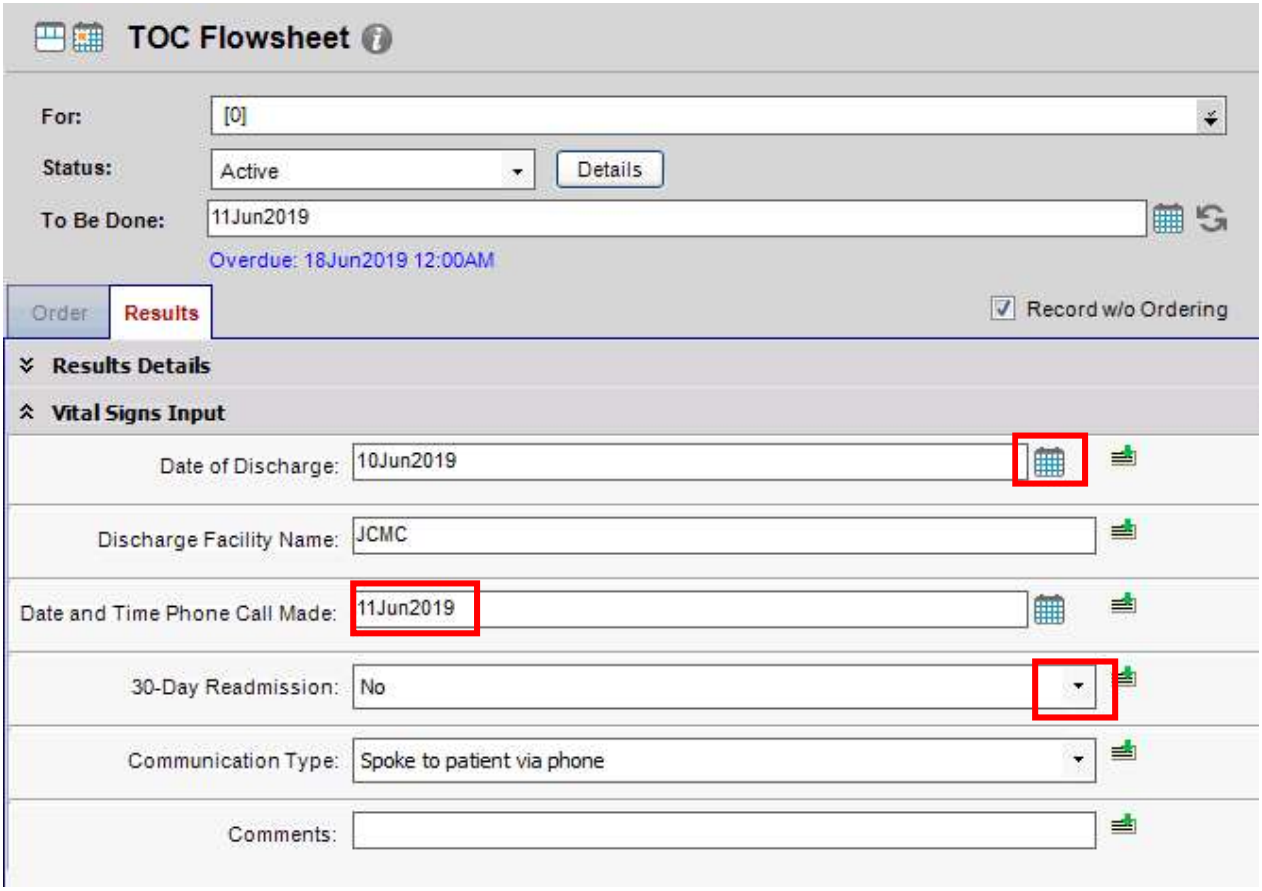
The following page will display. This is where the designated staff will enter the information. Once the information is entered, click OK. **Notice that the new column will default to today's date, but that will need to be changed to match the hospital discharge date.** Right-click in the new column and select **Enter Result** to open the Results Details window. Expand the **Results Details** section and change the **Collected/Examined** date to be the date of hospital discharge (see below). Complete the appropriate sections in the **Vital Signs Input** section.



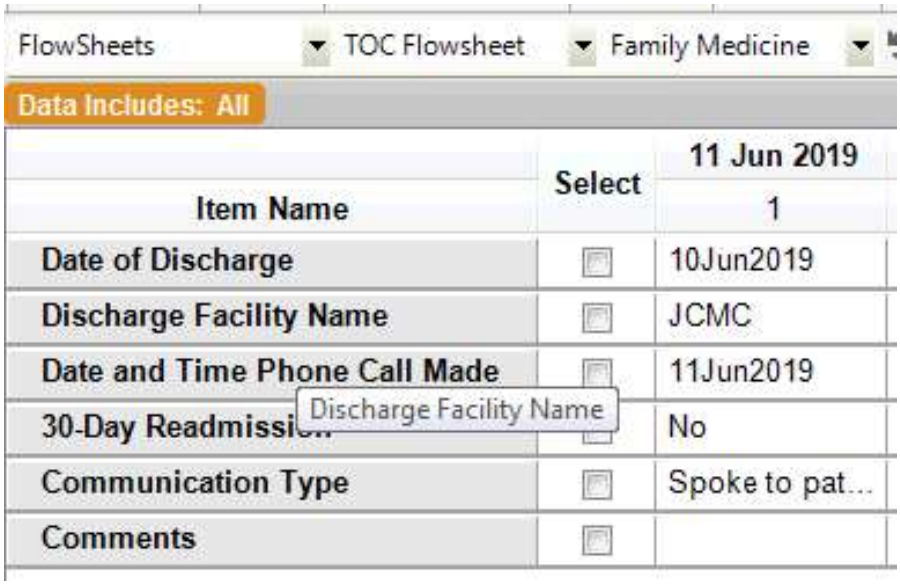

TEST, Monaco 03-Mar-1979 (40 years) F
TOC Flowsheet
For:
[0]
Status:
Active
Details
To Be Done:
10Jun2019
Overdue: 17Jun2019 12:00AM
Order
Results
Record w/o Ordering
Results Details
Resulted:
Collected/Examined:
10Jun2019 10:46AM
Now
Verification Required
CC Results
Ordered By:
Montgomery, Julie
Route To:
Performing Location:
Performed By:
Accession #:
Comments From Performing Location:
Vital Signs Input
Date of Discharge:
10Jun2019
Discharge Facility Name:
JCMC
Date and Time Phone Call Made:
10Jun2019
30-Day Readmission:
No
Communication Type:
Spoke to patient via phone
Comments:



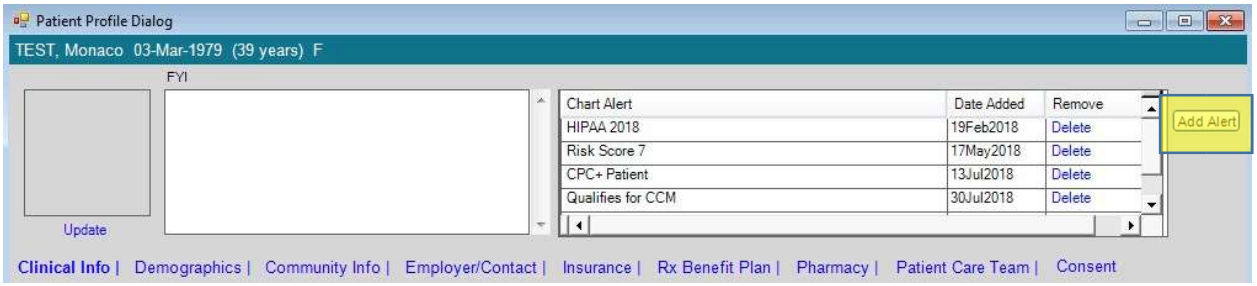
6. Fill the form out by clicking on the calendar button, using the dropdown, or free texting. **For the Date and Time Phone Call Made question, you will need to use the calendar to put the date and then free text the time.

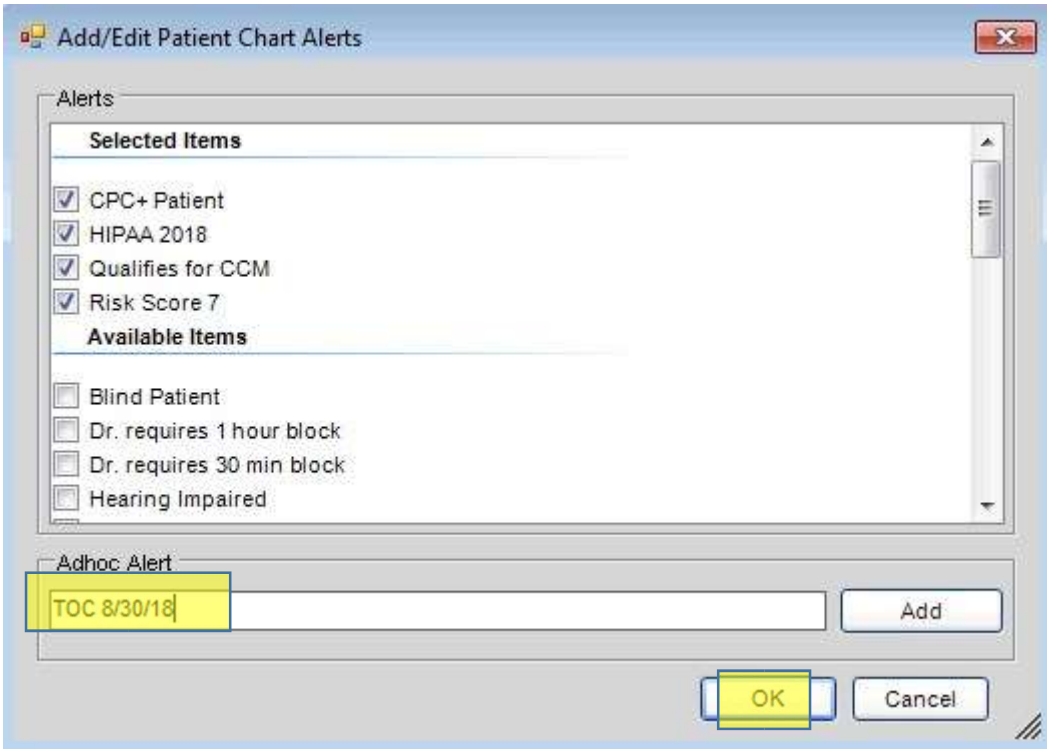


7. Click Ok and Commit. The following is what the flowsheet will look like

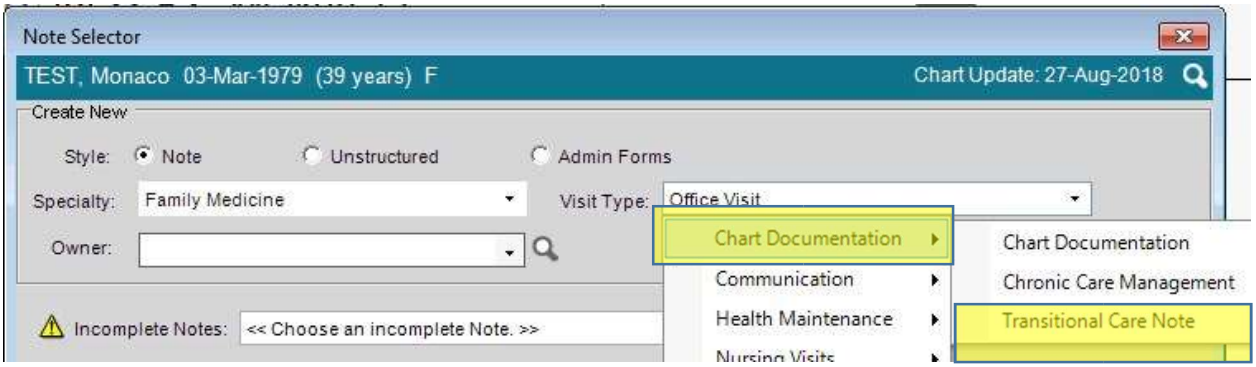


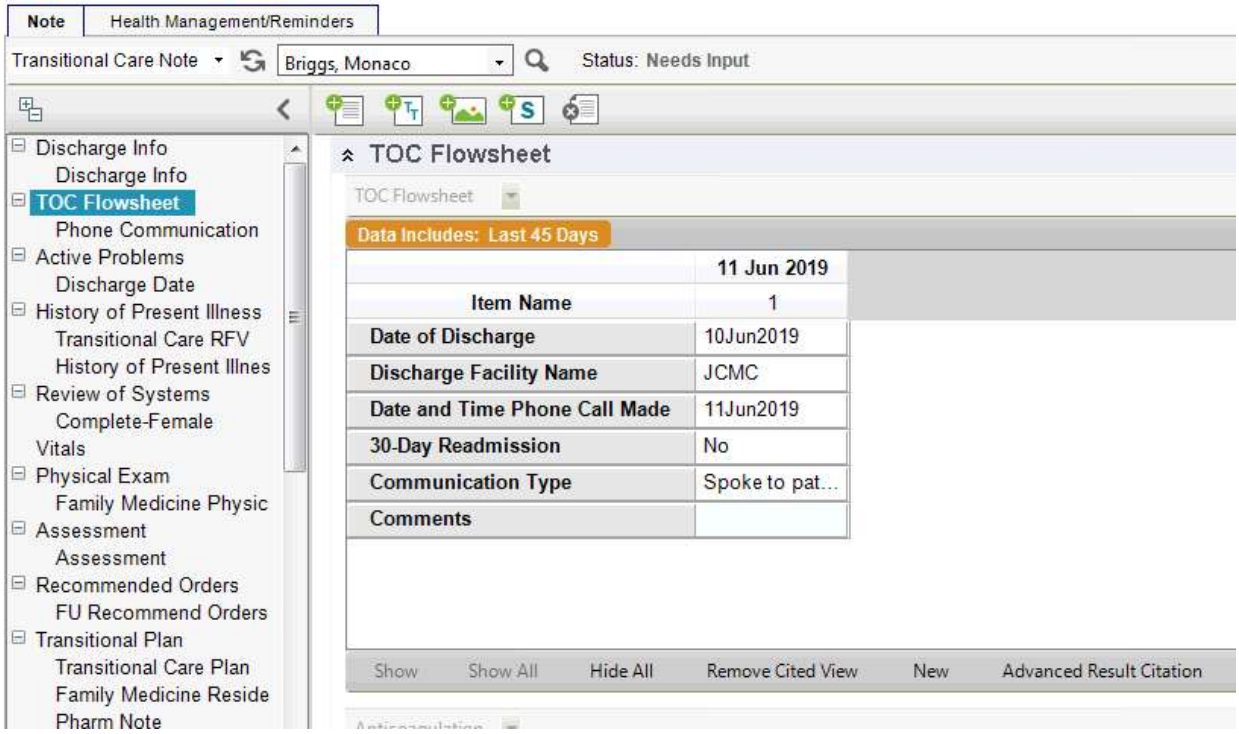
8. Go into the "I" button on the Patient Banner and add a Chart Alert that says, **"TOC, date"** This date will be the date of the scheduled appointment.



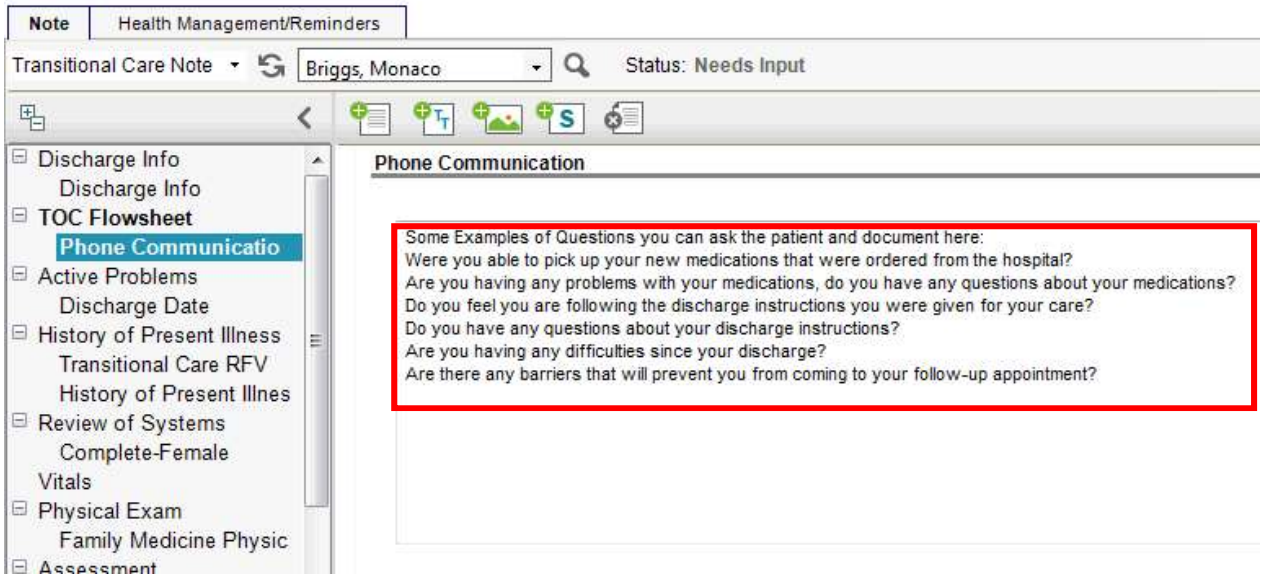


9. The identified staff will then open the **Transitional Care Note** and fill out the any additional fields needed. The TOC flowsheet will auto-populate in the **TOC Flowsheet** section.

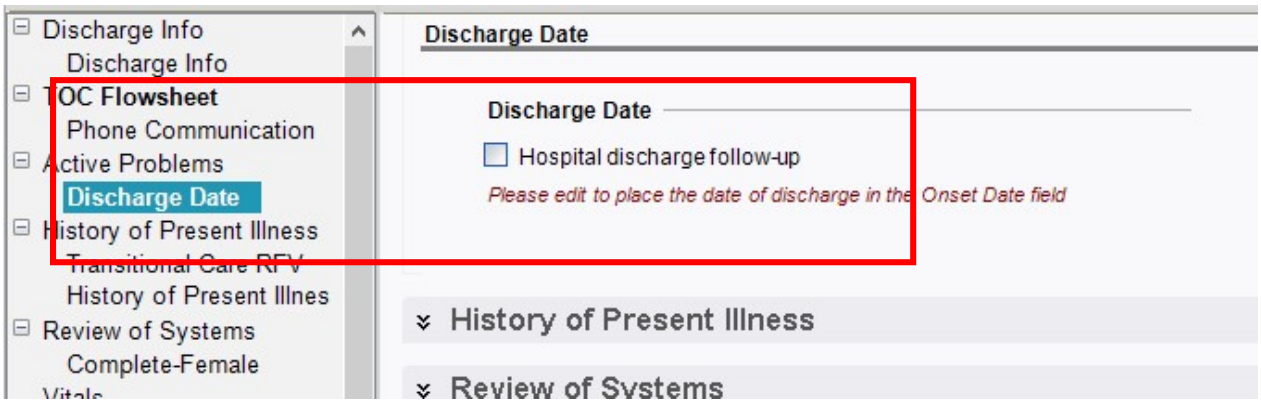




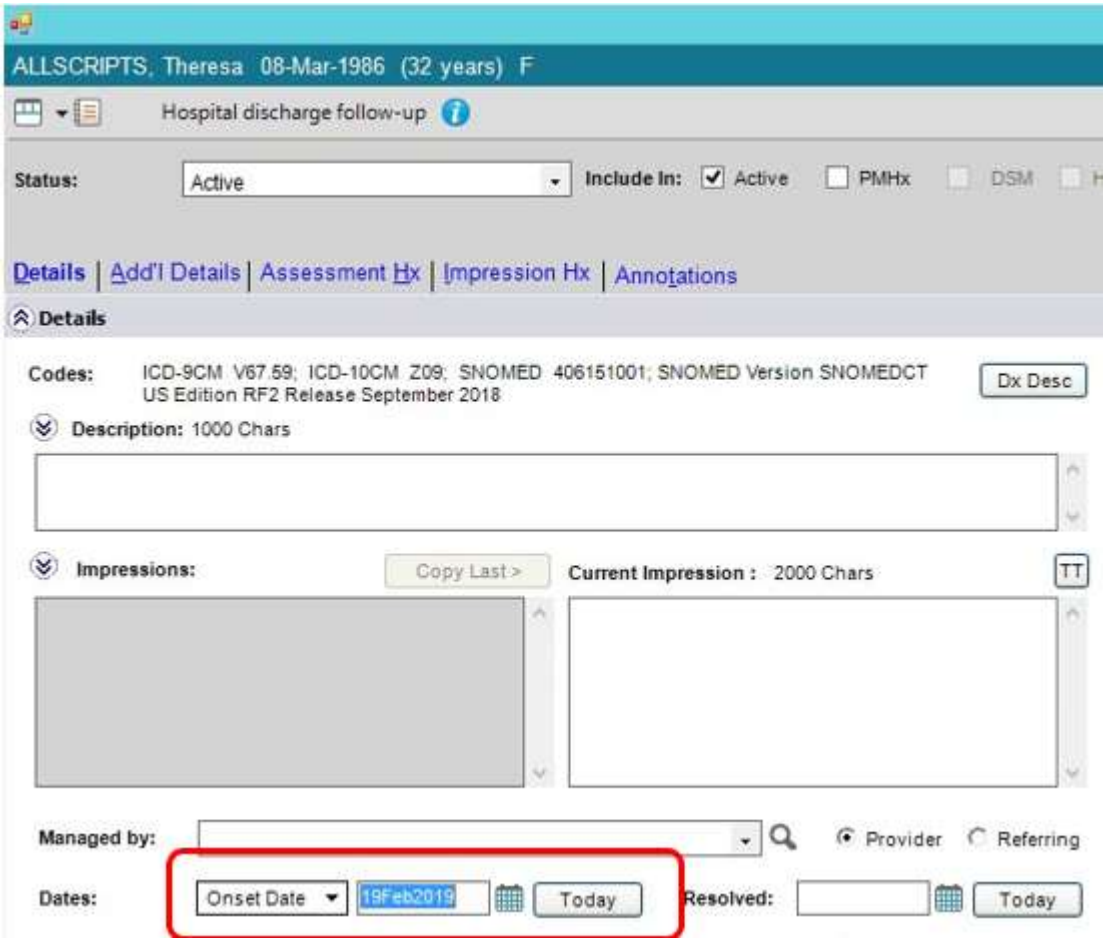
10. Documentation of the phone conversation with the patient will need to be free texted into the **Phone Communication** text box. Please note the examples of questions you can ask the patient and document in the **Phone Communication** text box.



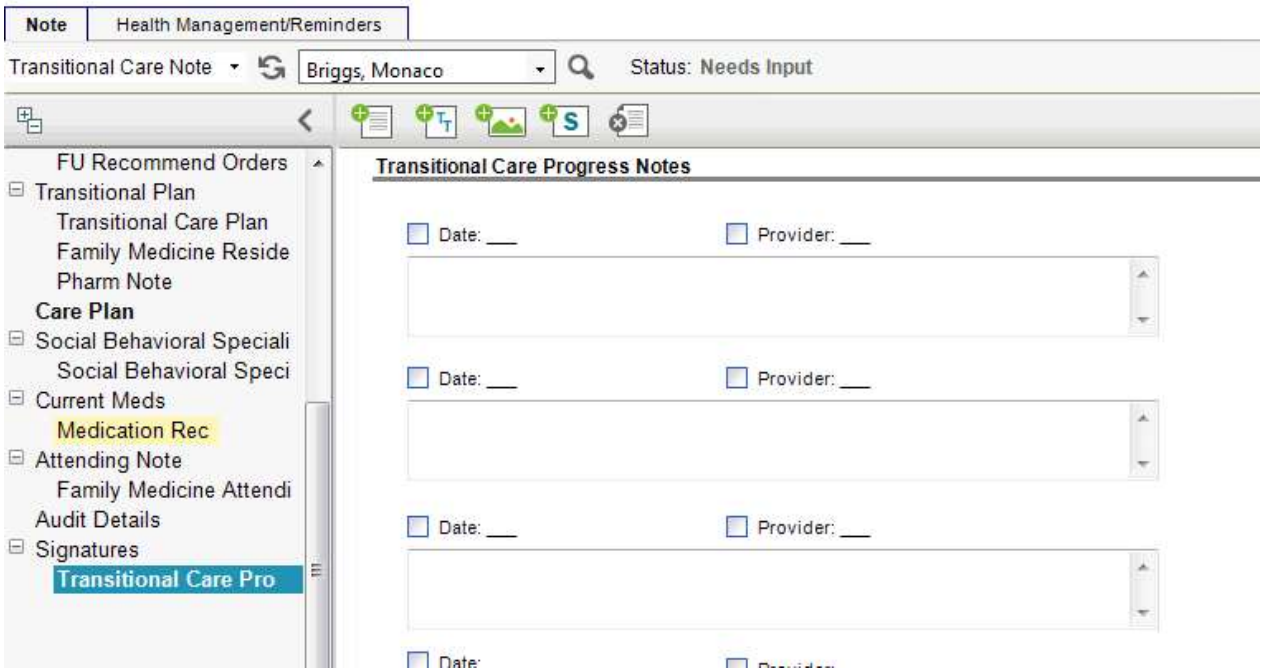
11. Click on the Discharge Date form and Click Hospital Discharge follow-up.



This will add the Z09 to the chart. Right-click on the diagnosis, and select **EDIT.** Use the calendar tool to enter an onset date matching the date of discharge (or update an existing diagnosis with the most recent hospital discharge date).



12. The note will be completed and signed as usual by all members of the team.
13. If the patient does not show for the appointment, **the note needs to be invalidated.**
14. The note will remain open for 30 days. Any non-face-to-face information needs to be documented in the **Transitional Care Progress Note** section.



15. After 30 days, the note is finalized and the chart alert is removed from the chart.

Billing

1. Encounter form is received
2. The dummy code "98638" is billed out with a 0 charge
3. After 30 days, the correct code is billed.
4. Remove the Chart Alert
5. Send task to Monaco to finalize the note