




Transition Summary Note

Quick Reference Guide



This **Quick Reference Guide (QRG)** provides step-by-step instructions on how to complete the **Transition Summary Note**, a structured electronic document used to standardize documentation for patient transitions that occur from one service to another.

How to Complete a Transition Summary Note

<p>Place the Patient into Context and Open the Document</p>	<ul style="list-style-type: none"> Find the patient using Status Board, Patient List or the Find Patient functionality and place the patient visit into context Click on the Enter Document icon  on the Main Toolbar and select the Transition Summary Note
<p>Demographics</p>	<ul style="list-style-type: none"> The patients age, gender, admission date and time and length of stay will display
<p>Advanced Care Plan</p>	<ul style="list-style-type: none"> This section is not in use as Computerized Provider Order Entry (CPOE) is not in scope
<p>Chief Complaint</p>	<ul style="list-style-type: none"> Free text field
<p>Medical/ Surgical History</p>	<ul style="list-style-type: none"> If applicable, check off any existing Health Issues as entered for Medical and Surgical History <ul style="list-style-type: none"> If not already available or updates are required, add and modify Health Issues by clicking the Health Issues Manager icon  and selecting applicable problems
<p>Allergies</p>	<ul style="list-style-type: none"> Allergies and Intolerances documented in the patient's chart will appear here and will be automatically selected for inclusion in the Note. Uncheck any items you do not want to include If not already entered, add Allergies by clicking the Allergy Summary icon 
<p>All Active/Suspended/ Hold Medication Orders</p>	<ul style="list-style-type: none"> This section is not in use as Electronic Computerized Provider Order Entry (CPOE) is not in scope
<p>Medication Comments</p>	<ul style="list-style-type: none"> This is a free-text field to add additional information about the patients' current medications

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Consults	<ul style="list-style-type: none"> This section is not in use as Computerized Provider Order Entry (CPOE) is not in scope
Summary of Consultant Notes	<ul style="list-style-type: none"> This is a free text-field to summarize consultant findings as applicable
Current Problems/Surgery Current	<ul style="list-style-type: none"> If applicable, check off any existing Health Issues as entered for Current Problems and Surgery Current <ul style="list-style-type: none"> If not already available or updates are required, add and modify Health Issues by clicking the Health Issues Manager icon  and selecting applicable problems
Impression	<ul style="list-style-type: none"> The Impression field is a free-text box to document the impression of the patient's assessment/problems
Problem/Assessment/Plan	<ul style="list-style-type: none"> If not already available or updates are required to the patient's Current Problem/Surgery Current: <ol style="list-style-type: none"> Add and modify Health Issues by clicking the Health Issues Manager icon  Copy the Problem List by selecting one of the radio button selections within the Problem/Assessment/Plan Once problems have been entered, you can prioritize them by moving them up or down your list using the up/down/clear options on the right side Document the assessment and plan for the respective problem
Course in Hospital	<ul style="list-style-type: none"> The Course in Hospital field is a free-text box to document the patient's course in hospital
Follow Up Recommendations	<ul style="list-style-type: none"> This is a free-text field to document the recommendations for future patient follow-up
Save the Transition Summary Note	<ul style="list-style-type: none"> Click the Save/Close button <ul style="list-style-type: none"> Click Submit as Final if your note is complete Click Submit as Incomplete for the document to remain modifiable