


## Transfer case to another Provider or Health Center

### Quick Reference Guide

How to transfer a case(s) between providers or to another health center. Included: Transfer one case, Transfer multiple cases, View Transfers, Accept incoming transfers, and Transfer case within group of providers.

| Transfer one case                    |   |    |               |              |  |                   |            |                   |                |                   |                       |                         |                       |                         |                   |                |                   |                          |  |  |              |              |  |        |        |  |  |  |    |   |      |         |                |
|--------------------------------------|---|----|---------------|--------------|--|-------------------|------------|-------------------|----------------|-------------------|-----------------------|-------------------------|-----------------------|-------------------------|-------------------|----------------|-------------------|--------------------------|--|--|--------------|--------------|--|--------|--------|--|--|--|----|---|------|---------|----------------|
| <p><b>1. Identify Case</b></p>       | <ul style="list-style-type: none"> <li>From the <b>List View</b>, identify the patient</li> </ul>   |    |               |              |  |                   |            |                   |                |                   |                       |                         |                       |                         |                   |                |                   |                          |  |  |              |              |  |        |        |  |  |  |    |   |      |         |                |
| <p><b>2. Transfer</b></p>            | <ul style="list-style-type: none"> <li>Click the green bidirectional arrows </li> <li>Fill out the <b>Transfer Case</b> options:                             <ul style="list-style-type: none"> <li>Select request type: <b>Transfer to List</b> (default)</li> <li>Select the <b>Health Center</b>:                                     <ul style="list-style-type: none"> <li>If staying within the same Health Center, leave as the default</li> <li>If transferring between Regional and Winnipeg, select from the drop-down list</li> </ul> </li> <li>Select the <b>Service</b> from the drop-down list</li> <li>Select the <b>Provider</b> from the drop-down list</li> <li>Click <b>Request Transfer</b></li> </ul> </li> </ul> <div data-bbox="1107 898 1458 1117" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Transfer Case (Red, Cardinal)</b></p> <p>Select request type:<br/> <input type="radio"/> Add to Pool<br/> <input checked="" type="radio"/> <b>Transfer to List</b></p> <p>Select Health Center:<br/>             Winnipeg</p> <p>Select Service:<br/>             [Dropdown]</p> <p>Select Provider:<br/>             [Dropdown]</p> <p style="text-align: right;">Request Transfer Cancel</p> </div> <div data-bbox="526 1136 1474 1293" style="border: 1px solid #008000; padding: 10px; margin-top: 10px;"> <p><b>!</b> If transferring to the same provider between the Regional and Winnipeg Health Centers, accept the incoming transfer and update the Case Details</p> </div>  |    |               |              |  |                   |            |                   |                |                   |                       |                         |                       |                         |                   |                |                   |                          |  |  |              |              |  |        |        |  |  |  |    |   |      |         |                |
| <p><b>3. View Transfer cases</b></p> | <ul style="list-style-type: none"> <li>The transferred patient will appear at the bottom of the <b>View List</b> page under the heading <b>Transfer Patients</b> until the receiving provider accepts the transfer</li> <li>To cancel the transfer click <b>Cancel</b></li> </ul> <div data-bbox="581 1480 1416 1596" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Transfer Patients</p> <table border="1"> <thead> <tr> <th></th> <th>Cancellations</th> <th>NT</th> <th>Name</th> <th>Novard ID</th> <th>Procedure</th> <th>Target Days (Pst)</th> <th>Care Venue</th> <th>Anesth</th> <th>Next Available</th> <th>Current Surg Date</th> <th>Adjusted Days on List</th> <th>Adjusted Days to Target</th> <th>PSS Status</th> <th>Request Status</th> <th>Intent of Surgery</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>Red Cardinal</td> <td>P00000000043</td> <td>REMOVAL HARDWARE KNEE (Bilateral) 37 minutes</td> <td>28 (2)</td> <td>PAC-OR</td> <td></td> <td></td> <td></td> <td>22</td> <td>5</td> <td>Send</td> <td>Pending</td> <td>Reconstruction</td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> <li>On the main menu bar, hover over <b>List</b> and choose <b>Transfers</b> to see the <b>Transfer Request List</b></li> <li>To cancel the transfer click <b>Cancel</b></li> </ul> <div data-bbox="1068 1690 1172 1764" style="border: 1px solid #ccc; padding: 2px; margin-top: 10px;"> <p>Request Status<br/>Pending<br/>Cancel</p> </div> <div data-bbox="1286 1617 1425 1753" style="border: 1px solid #ccc; padding: 2px; margin-top: 10px;"> <p>List Tasks</p> <ul style="list-style-type: none"> <li>View List</li> <li>Add Patient</li> <li>View History</li> <li>Print Booking Forms</li> <li>Repeat / Follow-up List</li> <li><b>Transfers</b></li> <li>Patient Search</li> </ul> </div> |    | Cancellations | NT           | Name   | Novard ID         | Procedure  | Target Days (Pst) | Care Venue     | Anesth            | Next Available        | Current Surg Date       | Adjusted Days on List | Adjusted Days to Target | PSS Status        | Request Status | Intent of Surgery | <input type="checkbox"/> |  |  | Red Cardinal | P00000000043 | REMOVAL HARDWARE KNEE (Bilateral) 37 minutes | 28 (2) | PAC-OR |  |  |  | 22 | 5 | Send | Pending | Reconstruction |
|                                      | Cancellations   | NT | Name          | Novard ID    | Procedure                                    | Target Days (Pst) | Care Venue | Anesth            | Next Available | Current Surg Date | Adjusted Days on List | Adjusted Days to Target | PSS Status            | Request Status          | Intent of Surgery |                |                   |                          |  |  |              |              |  |        |        |  |  |  |    |   |      |         |                |
| <input type="checkbox"/>             |   |    | Red Cardinal  | P00000000043 | REMOVAL HARDWARE KNEE (Bilateral) 37 minutes | 28 (2)            | PAC-OR     |                   |                |                   | 22                    | 5                       | Send                  | Pending                 | Reconstruction    |                |                   |                          |  |  |              |              |  |        |        |  |  |  |    |   |      |         |                |

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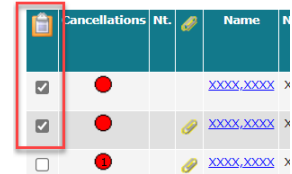
### Quick Reference Guide

#### Transfer multiple cases

If you use the clipboard feature to manage your workflow, this method should not be used as it will transfer all patients on the clipboard

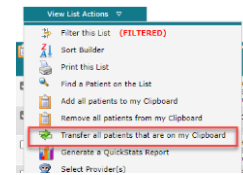
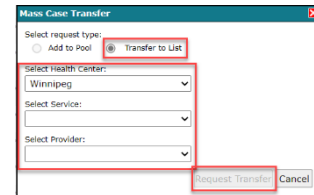
#### 1. Identify Cases

- From the **List View**, identify the patients to be transferred by clicking the check box in the clipboard column



#### 2. Transfer

- From the **View List Actions** menu choose **Transfer all patients that are on my Clipboard**
- Fill out the **Mass Case Transfer** options:
  - Select request type: **Transfer to List** (default)
  - Select the **Health Center, Service and Provider** from the dropdown list
  - Click **Request Transfer**

- On the **Mass Transfer** window click **Create Requests**, then click **Close**

| Mass Transfer - Transfer from List to List (not pooled) |                    |  |     |                      |      |        | 3 Cases Selected |  |
|---|--------------------|--|-----|----------------------|------|--------|------------------|--|
| Patient Name  | Diagnosis Category | Procedure                                    | Pri | Responsible Provider | Pool | Status | Message          |  |
| Red_Cardinal  | [C] KNOWN CANCER   | REMOVAL HARDWARE KNEE (Bilateral) 37 minutes | 2   | Dr. Bohm, Eric       |      | Passed |                  |  |
| Red_Cardinal  | [C] KNOWN CANCER   | AMPUTATION DIGIT (Left) 25 minutes           | 2   | Dr. Bohm, Eric       |      | Passed |                  |  |
| SWIMTEST, Cancel02                                      | ACUTE TRAUMA       | ARTHROGRAM HIP (Right) 15 minutes            | 1   | Dr. Bohm, Eric       |      | Passed |                  |  |

Passed: 3 Failed: 0

**Create Requests** **Close**

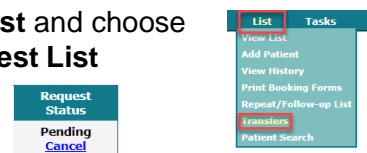
#### 3. View Transfer cases

- The transferred patient will appear at the bottom of the **View List** page under the heading **Transfer Patients** until the receiving provider accepts the transfer
- To cancel the transfer click **Cancel**

Transfer Patients

| Clipboard                | Cancellations | NT | Name         | Novari ID   | Procedure                                    | Target Days (Pri) | Care Venue | Anesth | Next Available | Current Surg Date | Adjusted Days on List | Adjusted Days to Target | IPSS Status | Request Status | Intent of Surgery |
|--------------------------|---------------|----|--------------|-------------|--|-------------------|------------|--------|----------------|-------------------|-----------------------|-------------------------|-------------|----------------|-------------------|
| <input type="checkbox"/> |               |    | Red_Cardinal | P0000000043 | REMOVAL HARDWARE KNEE (Bilateral) 37 minutes | 28 (2)            | PAC-OR     |        |                |                   | 22                    | 5                       | Send        | Pending        | Reconstruction    |

- On the main menu bar, hover over **List** and choose **Transfers** to see the **Transfer Request List**
- To cancel the transfer click **Cancel**



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### Quick Reference Guide

| Accept incoming transfers           |  |
|-------------------------------------|--|
| <p>1. Identify Cases</p>            | <ul style="list-style-type: none"> <li>From the <b>Dashboard</b>, select <b>Cancelled or Pending Transfer Requests</b></li> </ul> <div data-bbox="548 499 1390 575" style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;"> <span style="background-color: #e91e63; color: white; padding: 2px 5px; font-weight: bold;">3</span> Canceled or Pending Transfer Requests<br/>                     Your transfer requests which have been cancelled, or transfer requests awaiting your acceptance                 </div> </div>  |
| <p>2. Accept or Reject Transfer</p> | <ul style="list-style-type: none"> <li>From the <b>Transfer Request List</b>, either <b>Accept</b> or <b>Reject</b> the inbound request(s) under <b>Request Status</b></li> </ul> <div data-bbox="1360 604 1442 676" style="float: right; border: 1px solid #0070c0; padding: 2px;"> <b>Request Status</b><br/> <a href="#">Accept</a><br/> <a href="#">Reject</a> </div> <div data-bbox="526 688 1474 991" style="border: 2px solid #0070c0; padding: 10px; margin-top: 10px;"> <div style="display: flex; align-items: center;"> <p><b>If the transfers are not yet accepted or rejected, when moving to the List View, the following pop up will appear until the transfers are accepted or rejected</b></p> </div> <div data-bbox="532 844 812 970" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <div style="background-color: #e91e63; color: white; padding: 2px; font-weight: bold;">Rejected/Incoming Pending Transfers</div> <p style="font-size: small;">There are 3 inbound pending transfer requests.<br/>Click <a href="#">here</a> or select 'Transfers' from the 'List' menu to view them.</p> <div style="text-align: right;"> <input type="button" value="Close"/> </div> </div> </div> |

| Transfer case within group of providers |  |
|---|--|
| <p>1. Select all providers</p>          | <ul style="list-style-type: none"> <li>From the splash screen, choose the <b>Provider's Office</b> module and select multiple providers</li> <li>Select the first provider, hold down CTRL on the keyboard and select the other provider(s)</li> </ul> <div data-bbox="1078 1192 1143 1255" style="float: right; margin-right: 20px;"> </div> <div data-bbox="1166 1129 1481 1306" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <div style="font-size: x-small; padding: 2px;">                 Ames, David (Winnipeg)<br/>                 Archer, Lori Anne (Winnipeg)<br/>                 Balageorge, Dimitrios (Winnipeg)<br/>                 Barron, Laurie (Winnipeg)<br/>                 Barske, Heather (Winnipeg)<br/>                 Bohm, Eric (Winnipeg)<br/>                 Burnell, Colin (Winnipeg)<br/>                 Clark, Tod (Winnipeg)<br/>                 Crosby, Jason (Winnipeg)<br/>                 Dillon, David (Winnipeg)<br/>                 Dubberley, James (Winnipeg)<br/>                 Flynn, Bryan (Winnipeg)             </div> <div style="text-align: right; font-size: x-small;"> <input type="button" value="Continue"/> </div> </div> |
| <p>2. Identify Case</p>                 | <ul style="list-style-type: none"> <li>Find the patient and open to the <b>Case Details</b> screen</li> </ul>  |
| <p>3. Switch the Provider</p>           | <ul style="list-style-type: none"> <li>Click on the <b>Provider</b> hyperlink</li> <li>Under <b>Select a Provider</b>, use the drop down to choose a different provider and click <b>Update</b></li> </ul> <div data-bbox="1019 1453 1123 1516" style="border: 1px solid #0070c0; padding: 2px; margin-bottom: 10px;"> <div style="background-color: #0070c0; color: white; padding: 2px; font-weight: bold; text-align: center;">Provider</div> <div style="text-align: center; font-size: x-small;">Dr. Bohm, Eric</div> </div> <div data-bbox="591 1646 727 1730" style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #0070c0; color: white; padding: 2px; font-weight: bold; text-align: center; font-size: x-small;">Select a Provider</div> <div style="border: 1px solid #ccc; padding: 2px; font-size: x-small;">Dr. Bohm, Eric</div> <div style="display: flex; justify-content: space-between; font-size: x-small; margin-top: 5px;"> <input type="button" value="Update"/> <input type="button" value="Cancel"/> </div> </div>   |