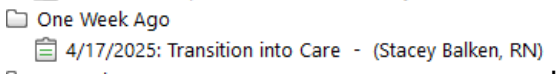
Transition Care Management Visit

Transition care management visits happen after a patient leaves the hospital or a care center. These visits are with the patient's regular doctor to check on how they are doing and update their medical record.

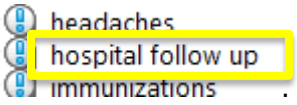
If a patient comes to the clinic after being in the hospital, they may qualify for this kind of visit.

Before the patient goes into the exam room, you must look at their chart. Go to the **encounter section** in the chart and find a past visit called **"Transition into Care"**. This note was written by the team care coordinator.

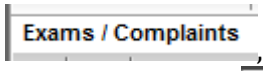
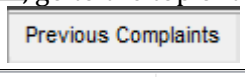
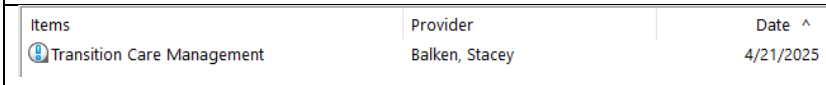


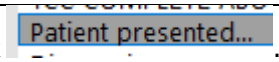
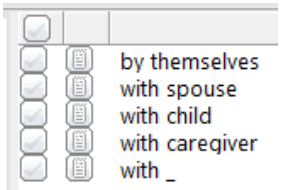
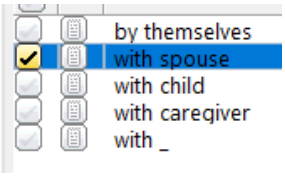
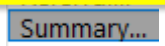
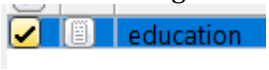
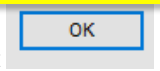
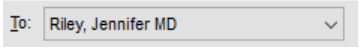
This visit usually happened in the last two weeks, but it could have been up to a month ago.

If no documentation is present the reason for visit will be



If the patient saw a doctor at the clinic after their discharge but before today's follow-up, talk to a team care coordinator before you follow the steps below.

Step	Action	Details
1.	Start Appointment	Start the appointment by following the usual rooming steps. Take the patient's vital signs, ask about their social history, check for allergies, and review their medications. Enter this information in the correct spots in the electronic health record (EHR).
2.	Reason for visit	Next, click  on the left-hand menu to add the reason the patient is seeing the doctor. A new screen will pop up.
		To add **Transition Care Management** to the visit  go to the top of the screen and use the first button on the left. 
		 Find it, then double-click to add it. A template will open showing what has already been filled out.
		The **patient initiator (PI)** or **medical assistant (MA)** will answer two of the remaining questions during rooming. The **Patient Presented** and **Summary** sections will be filled out by medical support staff.

		Click  . The screen will show different choices. Pick the one that best fits.  That answer will be added to the patient's note.  Patient presented to the clinic visit with spouse .
		Click on  . The screen will change to show one option. Click it to add it to the note.  The information will show up in the patient's medical record. Appropriate education was provided and the hospital summary was reviewed if available. The relevant history and laboratory testing was reviewed and discussed with the patient during the visit.
		Select  from the bottom right corner of the pop-up to close.
3.	Send chart to provider	Click the button  to send the chart. You'll find it in the top left corner, above the patient banner. A small window will pop up.
		In the top left of the window, choose the providers name from the list  .
		Then pick the room number from the subject list, or type it in.  Upper left corner
		Last, click the  button to give the chart to the provider.

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