**PURPOSE OF THIS FORM**

The purpose of this form is for the *I-SNP Primary Care Team* to capture key quality steps and details associated with any I-SNP member *transition* within a full ***transition episode***. A ***transition episode*** starts when the member transitions from their residence and ends when the member transfers back to their permanent place of residence.

This information will be shared with UCare Clinical Services Team for audit purposes validating that transition best practices processes are in place.

**COMPLETE TRANSITION EPISODE SUMMARY**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **TRANSITION 1** | **TRANSITION 2** | **TRANSITION 3** |
| **TRANSITION DATE** |  |  |  |
| **DEPARTING FACILITY** |  |  |  |
| **ADMITTING FACILITY** |  |  |  |

**I-SNP MEMBER DEMOGRAPHICS**

|  |  |
| --- | --- |
| **Member Name** |  |
| **Member Date of Birth** |  |
| **Member ISNP Health Plan Name** |  |
| **Member ISNP Health Plan Number** |  |

**I-SNP PROVIDER DEMOGRAPHICS**

|  |  |
| --- | --- |
| **I-SNP Agency/Provider Group Name** |  |
| **Care Coordinator Name** |  |
| **Care Coordinator Contact Number** |  |
| **Primary Care Provider (PCP) Name**  **(e.g. MD, NP)** |  |
| **PCP Contact Number**  **(e.g. MD, NP)** |  |

**TRANSITION LOGISTICS**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Transition #1 Date:** |  | | **Notification Date:** | |  | **Transition Day and Time:** | |  |
| **Departing Facility**  Member leaving from… | |  | | **Departing Facility Type\*** | | |  | |
| **Receiving Facility**  Member arriving to… | |  | | **Receiving Facility Type\*** | | |  | |

\*Facility Types: Nursing Facility: **NF** Assisted Living Facility: **ALF** Hospital: **HP** Transitional Care Unit: **TCU** Other Facility: **OF**

**Was the transition planned?**  YES  NO

|  |  |  |  |
| --- | --- | --- | --- |
| **Transition, Admitting or Presumed Diagnosis** |  | **Symptoms that lead to transition** |  |

**CARE COORDINATOR TASKS**

|  |  |  |
| --- | --- | --- |
| **TASK** | **DATE COMPLETED** | **Notes: Include NAME/TITLE OF PERSON**  **SPOKEN WITH** |
| **Contact usual setting to gather information and assist with transition.** *This must be within 1 business day of notification.* |  |  |
| **Contact member/representative to discuss transition, member health and plan of care.** *This must be within 1 business day of notification.* |  |  |
| **Notify PCP of transition.** *This must be within 1 business day of notification.* |  | **Phone  EMR**  **Fax  Other:** |
| **Contact receiving setting (hospital, TCU, SNF etc.) to introduce yourself as CC, assert participation in discharge planning and sharing the plan of care.** *This must be within 1 business day of notification.* |  |  |

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|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Transition #2 Date:** |  | | **Notification Date:** | |  | **Transition Day and Time:** | |  |
| **Departing Facility**  Member leaving from… | |  | | **Departing Facility Type\*** | | |  | |
| **Receiving Facility**  Member arriving to… | |  | | **Receiving Facility Type\*** | | |  | |

\*Facility Types: Nursing Facility: **NF** Assisted Living Facility: **ALF** Hospital: **HP** Transitional Care Unit: **TCU** Other Facility: **OF**

**Was the transition planned?**  YES  NO

**Is this the usual care setting?**  YES  NO

**CARE COORDINATOR TASKS (complete if member has *NOT*****returned to** **usual care setting)**

|  |  |  |
| --- | --- | --- |
| **TASK** | **DATE COMPLETED** | **Notes: Include NAME/TITLE OF PERSON**  **SPOKEN WITH** |
| **Contact discharging setting to gather information and assist with transition.** *must be within 1 business day of notification.* |  |  |
| **Contact member/representative to discuss transition, member health and plan of care.** *This must be within 1 business day of notification.* |  |  |
| **Notify PCP of transition.** *This must be within 1 business day of notification.* |  | **Phone  EMR**  **Fax  Other:** |
| **Contact receiving setting (hospital, TCU, SNF etc.) to introduce yourself as CC, assert participation in discharge planning and sharing of plan of care.** *This must be within 1 business day of notification.* |  |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Transition #3 Date:** |  | | **Notification Date:** | |  | **Transition Day and Time:** | |  |
| **Departing Facility**  Member leaving from… | |  | | **Departing Facility Type\*** | | |  | |
| **Receiving Facility**  Member arriving to… | |  | | **Receiving Facility Type\*** | | |  | |

\*Facility Types: Nursing Facility: **NF** Assisted Living Facility: **ALF** Hospital: **HP** Transitional Care Unit: **TCU** Other Facility: **OF**

**Was the transition planned?**  YES  NO

**Is this the usual care setting?**  YES  NO

**CARE COORDINATOR TASKS (complete if member has *NOT*****returned to** **usual care setting)**

|  |  |  |
| --- | --- | --- |
| **TASK** | **DATE COMPLETED** | **Notes: Include NAME/TITLE OF PERSON**  **SPOKEN WITH** |
| **Contact discharging setting to gather information and assist with transition.** *must be within 1 business day of notification.* |  |  |
| **Contact member/representative to discuss transition, member health and plan of care.** *This must be within 1 business day of notification.* |  |  |
| **Notify PCP of transition.** *This must be within 1 business day of notification.* |  | **Phone  EMR**  **Fax  Other:** |
| **Contact receiving setting (hospital, TCU, SNF etc.) to introduce yourself as CC, assert participation in discharge planning and sharing of plan of care.** *This must be within 1 business day of notification.* |  |  |

**TRANSITION ANALYSIS**

**Do you think this transition could have been prevented?** YES NO

If yes, how? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**The transition was influenced by:**  Provider Availability  Patient/Family  Off Hours  Facility issues

**\*CARE COORDINATOR TASKS**

**COMPLETE WHEN MEMBER RETURNS TO USUAL CARE SETTING\***

|  |  |  |  |
| --- | --- | --- | --- |
| **TASK** | **DATE COMPLETED** |  | **NOTES** |
| **Notify PCP of transition back to usual setting.** *This must be within 1 business day of notification* |  |  |  |
| **Contact member/representative. Discuss transition process, changes to member health, plan of care, education about transitions and how to prevent unplanned transitions/readmissions.** *This must be within 1 business day of notification.* |  |  | *If not within 1 business day, note reason here.* |
| **Convene the Interdisciplinary Care Team (ICT), telephonically or in person, within 30 days of post discharge to member’s usual setting.** |  |  |  |
| **Update the IPOC to include transition dates, changes in member’s status or goals related to change of condition as applicable**. |  | YES  NO |  |
| **Complete a medication review or reconciliation.** |  |  |  |
|  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Four Pillars for Optimal Transition** | | | |
|  | **DATE CARE COORDINATOR COMPLETED** |  | **NOTES- If answer is “No” provide an explanation here** |
| **Schedule/confirm that the member has a follow-up appointment scheduled 7 days of discharge with** p**rimary care or a specialist within 14 days** | YES  NO | **DATE OF APPOINTMENT** |  |
| **Is there an appropriate medication management system in place to ensure adherence to the medication regimen?** |  | YES  NO |  |
| **Is member able to verbalize signs and symptoms (red flags) to watch for and know how to respond?** |  | YES  NO |  |
| **Does member use a personal healthcare record? If yes, review with member.** *Check “YES” if visit summary, discharge summary, and/or healthcare summary are being used as a PHR.* |  | YES  NO |  |

Additional Comments/Notes:

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