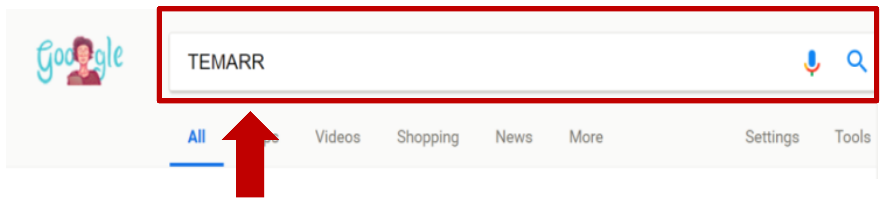
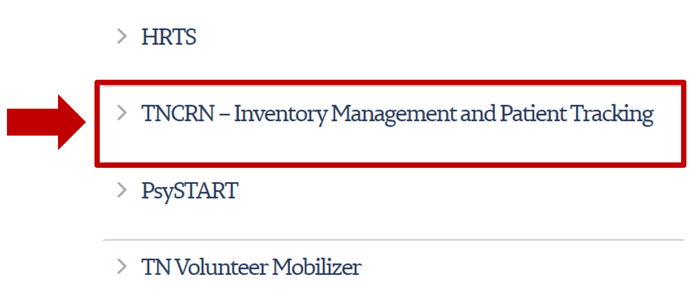
HCS Patient Tracking: Transfer a Patient
Job Aid

This Job Aid will walk you through step-by-step instructions on how to successfully fill out information for a patient transfer in the HCS Patient Tracking system. You will also learn how to transfer multiple patients at once.

NOTE: Because this is a training document, your view may be slightly different than what is shown in the screenshots.

How to Transfer a Patient	
Steps	**Screen**
STEP 1: Open a **web browser** (e.g. Google Chrome, Internet Explorer, etc.), and in the search box, enter TEMARR. *Result: TEMARR –TN.gov should be first link listed in the results. Click on it, and you will be taken to the TEMARR home page. Alternatively, you may click [here.]*	
STEP 2: Scroll down **the page** and click on the **TNCRN - Inventory Management and Patient Tracking** link. *Result: This section expands downward and reveals links to both the Inventory Management and HCS Patient Tracking systems.*	
STEP 3: Click on the **HCS Patient Tracking** link. *Result: The login screen for the HCS Patient Tracking system displays.*	

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STEP 4:

1. Log into the HCS Patient Tracking system by typing your **Username** and **Password** into the respective *Username* and *Password fields.*
2. Click on the **Sign In** button.

Result: The home page for the HCS Patient Tracking system displays with a welcome message and your name.

HELP: *If you need help with your Username or Password, contact your facility admin or RHC, or visit the TEMARR Customer Service Portal here.*

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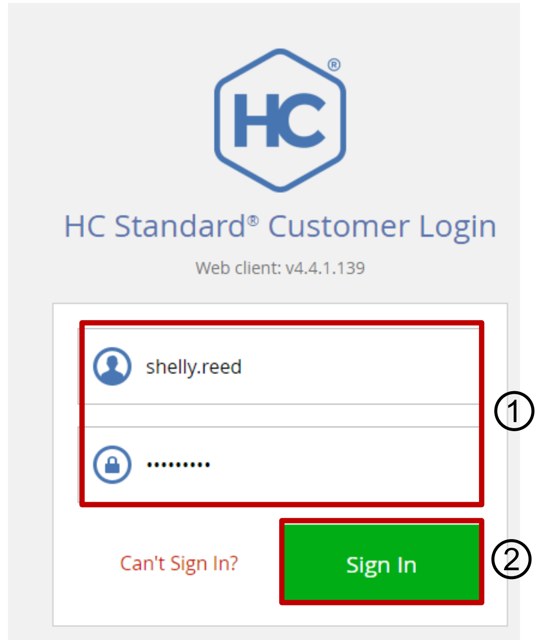

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STEP 5:

Click on **Workspaces** at the top of the page.

Result: A Search workspaces field displays, as well as a list of the workspaces assigned to you.

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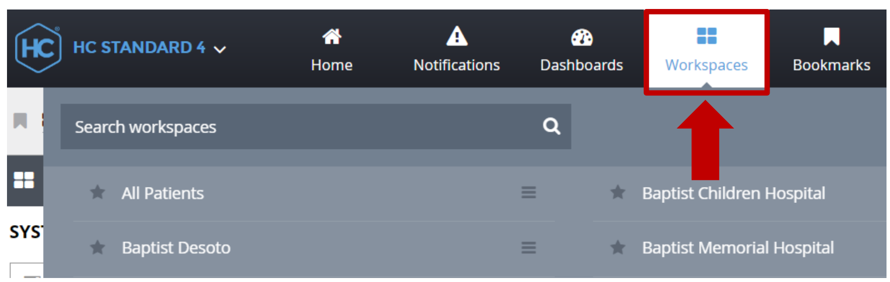

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STEP 6:

Enter in the **name of your facility** in the *Search workspaces field* to search it out and then click on the name, or simply click on the name if it is already listed.

Result: The Workspace page for your facility displays.

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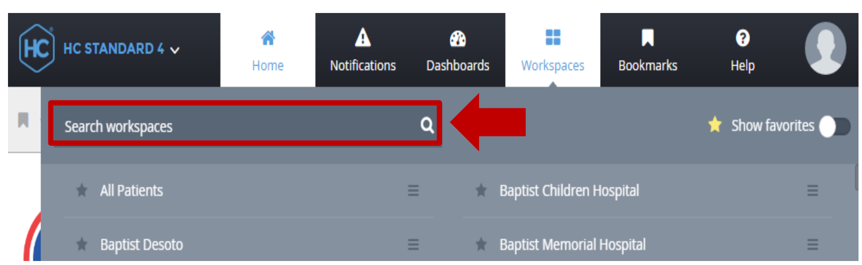

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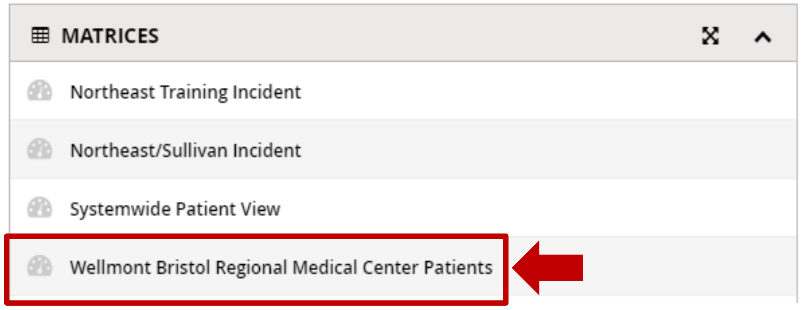
STEP 7:

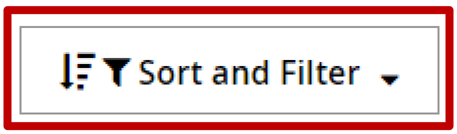
Locate and click on **[YOUR FACILITY'S NAME] Patients** within the MATRICES section.

Result: The Patient Data Results grid for your facility appears, listing all of your registered patients.

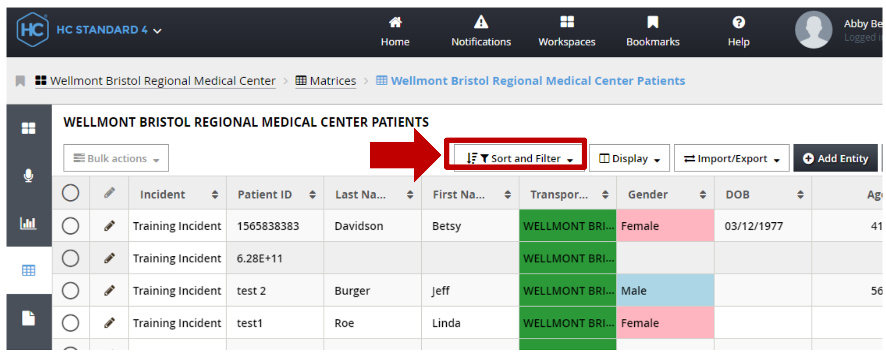


STEP 8:

Click on the **Sort and Filter** button at the top of the Patient Data Results grid in order to quickly locate a patient.



Result: The sorting and filters options appear at the top of the grid.

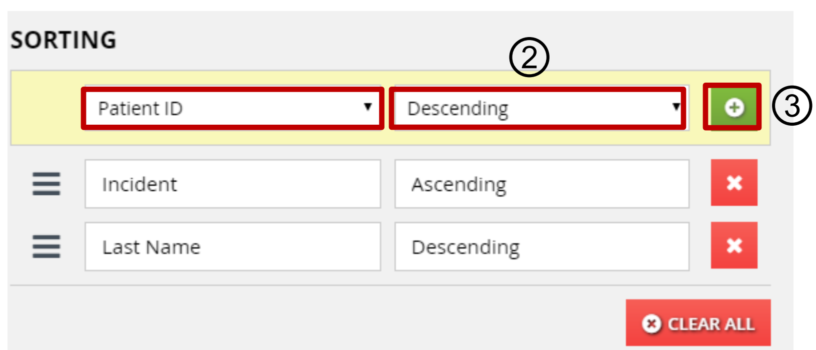


☝ **TIP:** *Columns are sortable! Each of the individual columns can be sorted in either Ascending or Descending order.*

1. *Select the measure you want to sort from the dropdown menu.*
2. *Select Ascending or Descending from the dropdown menu.*
3. *Click on the plus sign button.*

You can repeat this process for multiple columns, as shown.

4. *Click on the **Apply** button to apply the sort to all columns at once.*

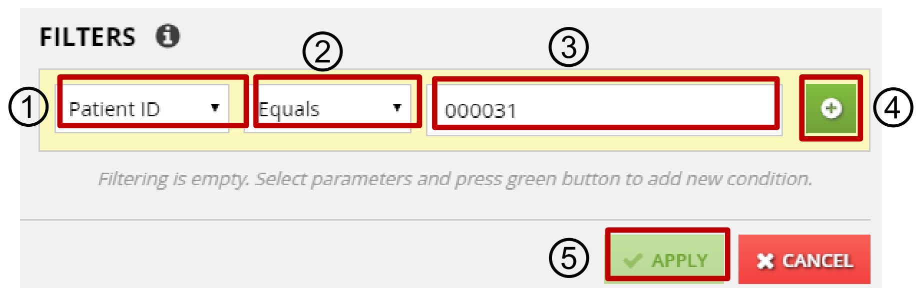


STEP 9:

Under the Filters section:

1. In the first dropdown menu, select **a measure** to search by (either Patient ID or Last Name).
2. For best results, verify that the Filter type (middle dropdown menu) is **Contains**.
3. In the free text field, type in the **Patient ID** or **Last Name** (depending on what you selected for your measure).
4. Click on the **plus** button to add this measure to the search.
5. Click on the **Apply** button.

Result: The matrix results will be filtered to your specifications.

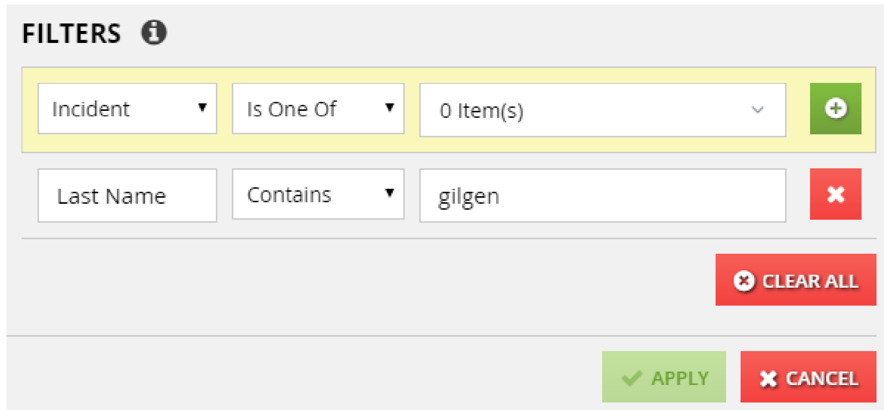


TIP: *Depending on what measure you choose to filter by, the filter type will change to accommodate the measure. For example, if you select Last name as your measure, then the available filter types to choose from are:*

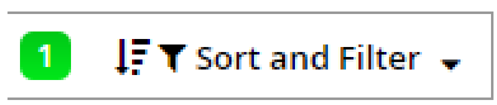
- *equals*
- *begins with*
- *contains*
- *does not equal*
- *ends with*
- *is empty*
- *is not empty*

If you select Contains, you only need to type a few letters from the last name to return results, whereas if you select Equals, you must type the last name in its entirety exactly as it appears in the system, or no results will be returned.

If you aren't getting any results returned, you may need to select a different filter type and/or measure and apply it. You can always click on CLEAR ALL to clear out all filters, or select the red X next to the measure to remove that measure from the filter.

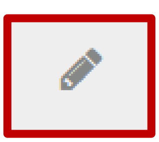


TIP: *The green highlighted number displayed on the Sort and Filter button indicates the number of measures applied to the filter.*

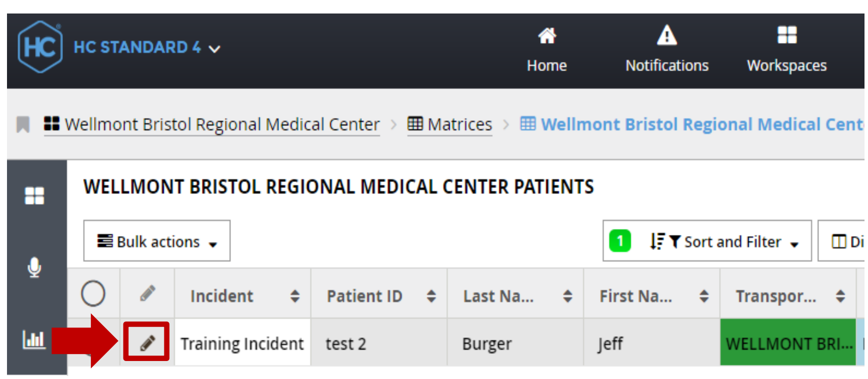


STEP 10:

Locate the patient you would like to transfer in the matrix results and click on the **pencil icon** (allows you to edit) to the left of the patient.



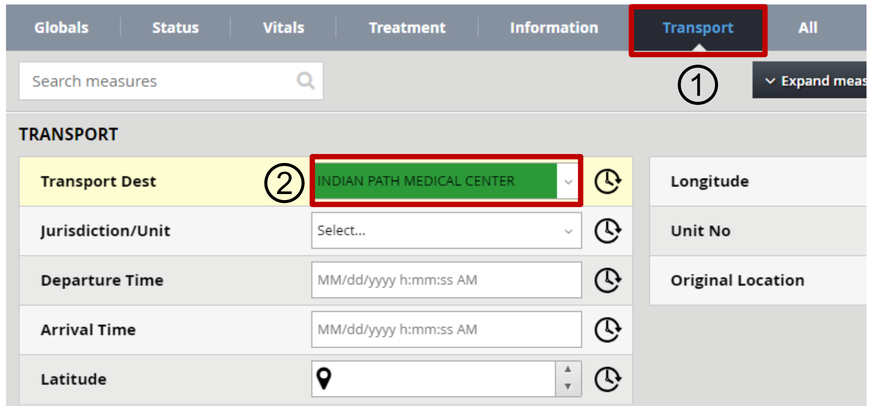
Result: The Navigational tabs used for the patient's information display.



STEP 11:

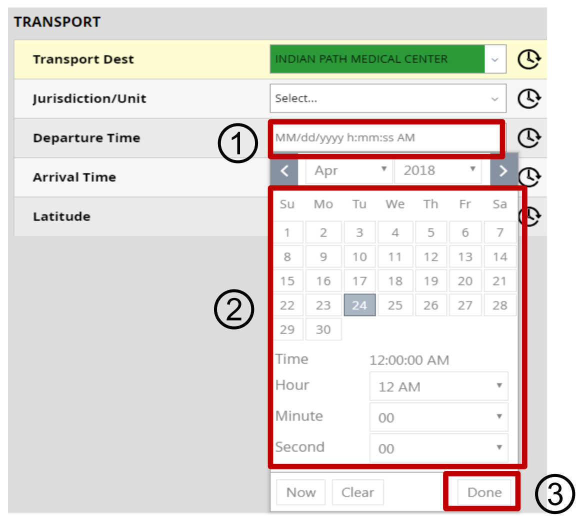
1. Click on the **Transport** tab.
2. Click into the **Transport Dest** field. Search by scrolling or typing in the **name of the facility** you would like to transfer the patient to and click on it.

TIP: *Facilities are color coordinated by region in order to make it easier to search them out.*



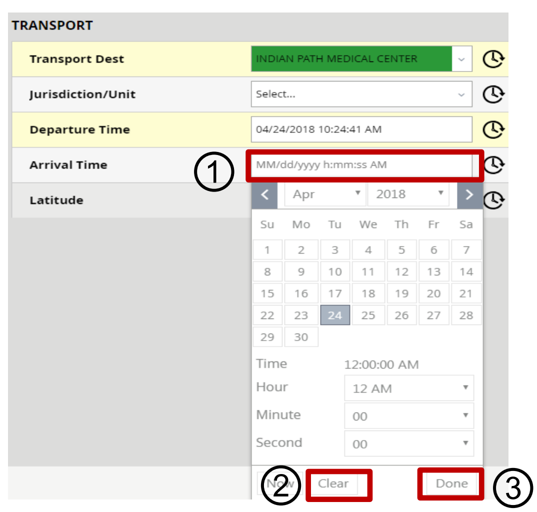
STEP 12:

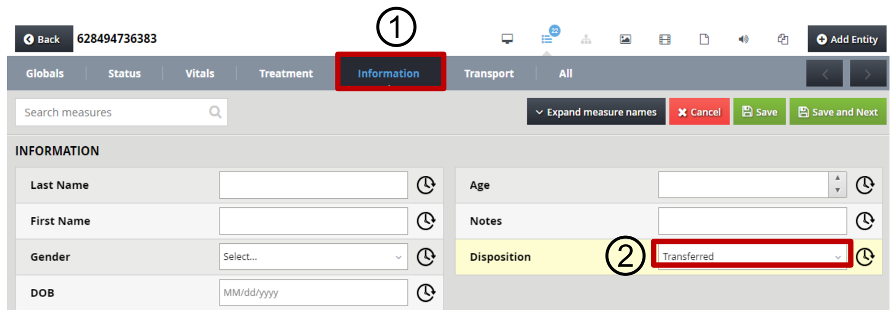
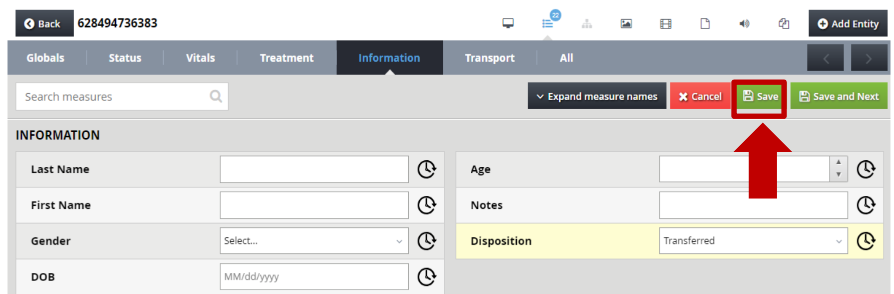
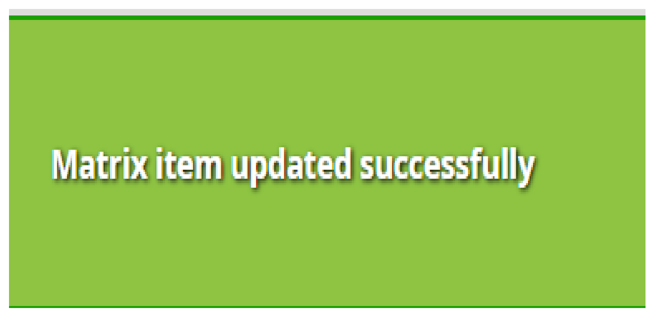
1. Click the **Departure time** field.
2. Click on the time manually using the **Hour, Minute**, and **Second** fields, or click on the **Now** button at the bottom left of the calendar for a departure time of now.
3. Click on the **Done** button at the bottom right of the calendar.



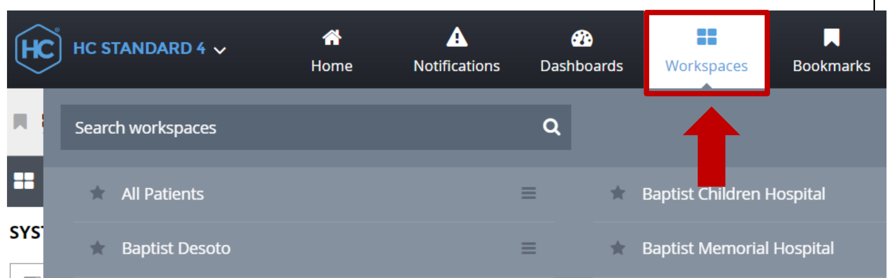
STEP 13:

1. Click into the **Arrival Time** field.
2. Click on **Clear** to clear out the arrival time.
3. Click on the **Done** button at the bottom right of the calendar.



STEP 14: 1. Click on the **Information** tab. 2. Click into the **Disposition** field and select **Transferred.**	
STEP 15: Click on the **Save** button.  *Result: A green bar with the following pop-up message will briefly display at the bottom of the screen, "Matrix item updated successfully."*	
	

<table>
<tr><th colspan="2">How to Transfer Multiple Patients</th></tr>
<tr><th>Steps</th><th>Screen</th></tr>
<tr><td>STEP 1:
Click on Workspaces at the top of the page.

Result: A Search workspaces field appears, as well as a list of the workspaces assigned to you.</td><td>
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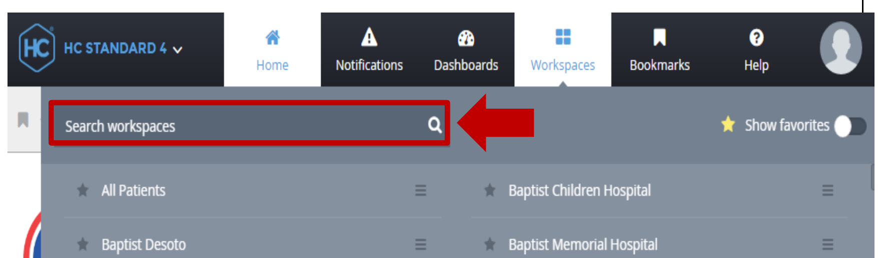
Enter in the name of your facility in the Search workspaces field to search it out and then click on the name, or simply click on the name if it is already listed.

Result: The Workspace page for your facility appears.</td><td>
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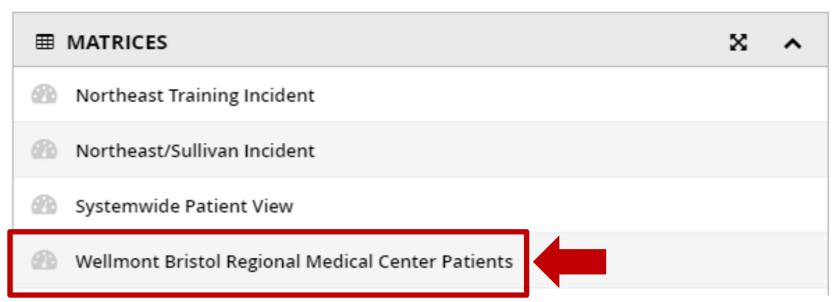
Locate and click on [YOUR FACILITY'S NAME] Patients within the MATRICES section.

Result: The Patient Data Results grid for your facility appears, listing all of your registered patients.</td><td>
</td></tr>
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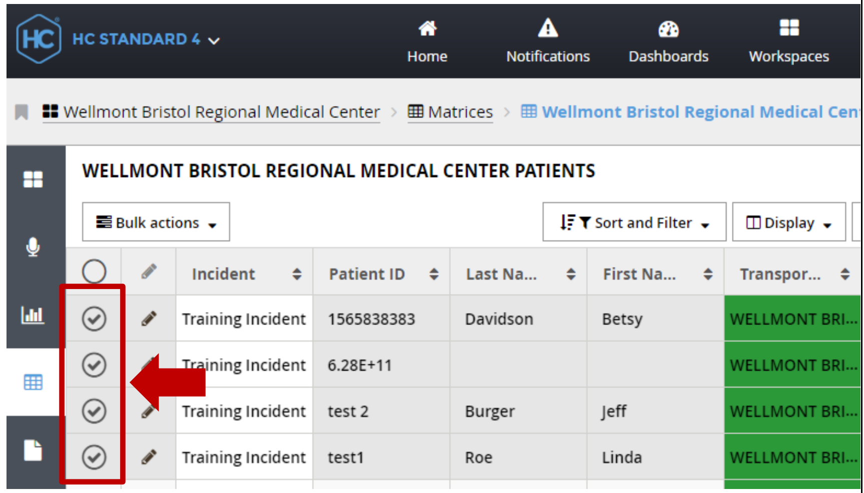
STEP 4:

Select the **radio button** next to each patient you would like to transfer.

*Result: The **Bulk actions** button enables, allowing you to click on it to take action.*

TIP: *As you select patients, a total number of selected items will appear at the bottom of the screen.*

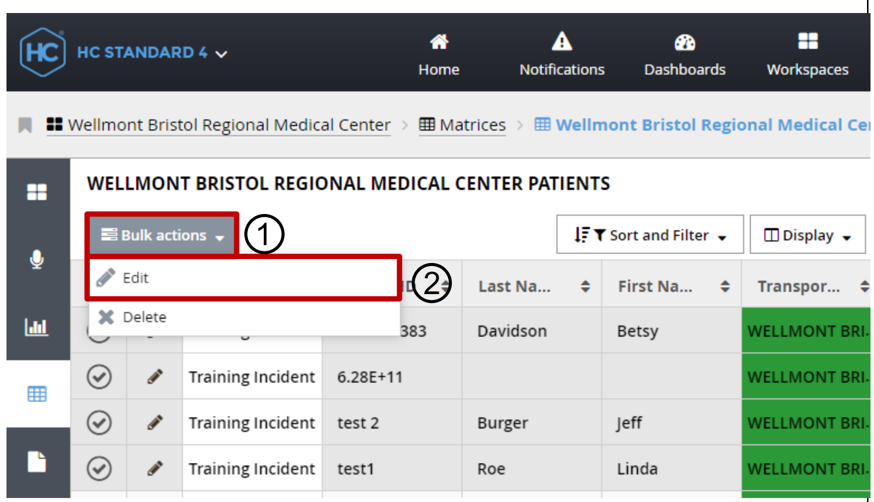


STEP 5:

1. Click on the **Bulk actions** button.

2. Click on **Edit.**

Result: The STEP 1 OF 2: SELECT MEASURES TO UPDATE popup screen displays.

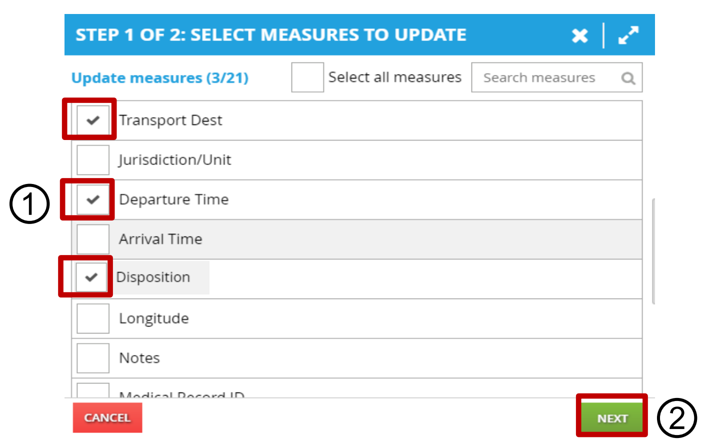


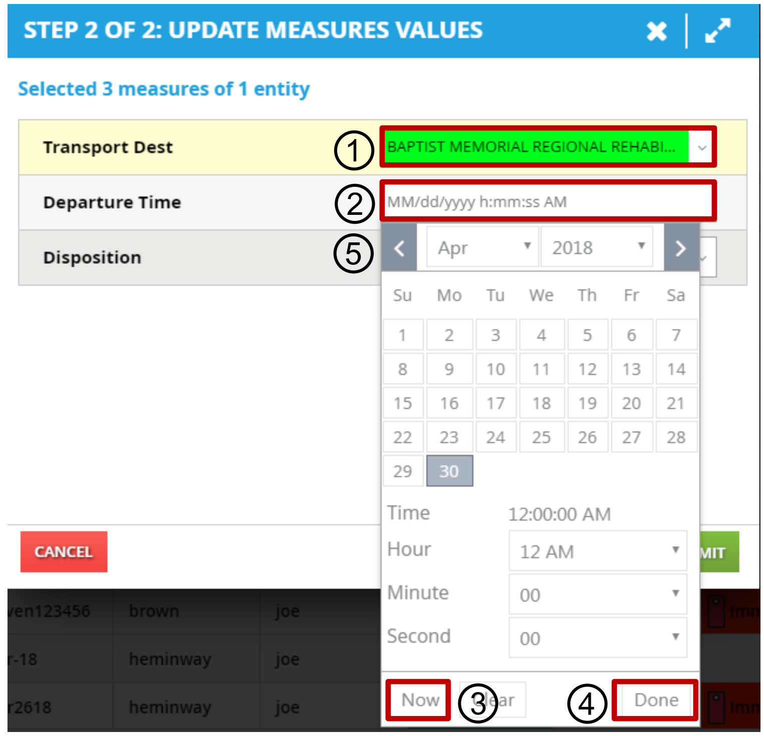
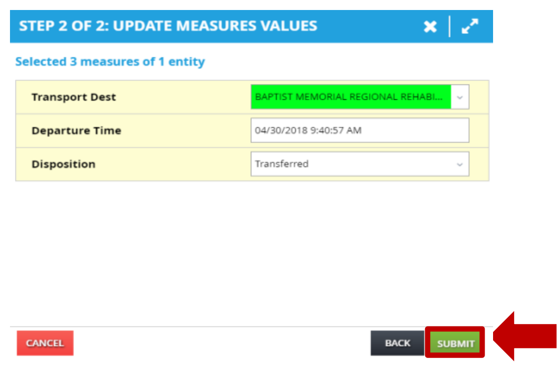
STEP 6:

1. Select the three measures of **Transport Dest, Departure Time,** and **Disposition.**

2. Click on the **Next** button.

Result: The STEP 2 OF 2: UPDATE MEASURES VALUES popup screen appears.



STEP 7: 1. Click on the **Transport Dest** field and select **the facility** you would like to transfer patients to. 2. Click on the **Departure Time** field. 3. Click on the **Now** button in the bottom left hand corner. 4. Click on the **Done** button. 5. Click on the **Disposition** field and select **Transferred**.	
STEP 8: Click on the **Submit** button. *Result: A Save Warning for [Facility] popup window displays.*	
STEP 9: Click on the **OK** button. **TIP:** *This warning message popup will appear letting you know that once your patients are transferred over to the new facility, you will no longer be able to view them in your matrix.*