INTERACT® User Instructions

Overview

As of Spring 2015, your ECS program includes the following INTERACT® tools in ECS v9.0.5 and above:

- SBAR
- Hospital-Rate Tracking Tool
- Quality Improvement Tool for Review of Acute-Care Transfers
- Quality-Improvement Summary
- Links to Care Paths and Acute Change of Condition file cards
- Stop and Watch Early-Warning Tool coming May 2015 by request; merging and integration costs apply.

To learn more about INTERACT (Interventions to Reduce Acute Care Transfers), you can go to https://pathway-interact.com/.

Please review the *INTERACT Implementation Guide* for guidance in preparing your ECS INTERACT setups for use.

Instructions for each of the tools are provided for both with and without access screens, and, where appropriate, both the use of Forms and traditional documentation screens. Edit this handout as needed to remove portions that do not apply to your facility.

SBAR (4 sets of Instructions follow)

(1) Completing the SBAR (Using Access Screens & Using Forms)

1. Using the Easy Access screens, navigate to the **Rehosp. Access** screen. Select the appropriate resident from the Names list and select the **SBAR** button from the SBAR column. The SBAR form will load.
    a. If you receive a message stating "There is a form in progress for this client," this means that a previously started SBAR form was not submitted. The incomplete form must be completed before a new one can be started.
2. Click on **Status** at the bottom of the screen, click **Collect**, and click OK in the Collect pop up box. Information about the resident will populate the form.
3. Complete page 1 of the form by adding check marks and text in the appropriate fields. When you have completed page 1, click the **Save** button at the bottom. Process in the same way though pages 2-4.
4. When the entire form has been completed and saved, close out of the form. A dialogue box will appear, asking you, "Would you like to submit this form?" Select **Yes**. The form will submit and close.

Additional SBAR Access Buttons

1. **View SBAR** allows you to View previous forms. Select a resident from the Names list and click on this button. The Form Selection Screen will appear with any past SBAR forms listed. If the screen is blank, no SBARs have been completed for this resident. The Status column will show you whether the form(s) are Submitted or Held. Typically, all forms should be submitted unless a nurse was interrupted while completing it and has not yet returned to it. Held forms are considered incomplete and should be finished and submitted. The presence of a Held SBAR will prevent a nurse from starting another SBAR.
2. **Edit SBAR** allows you to make changes to a previous form. The forms may be Submitted or Held. Choose the client from the Names list and click on this button to display the Form Selection Screen. Select the form you wish to edit or complete/submit and click OK. The form will load. Make any necessary changes and click the **Status** button at the bottom to make sure that each of the pages has been saved. ***<u>You must click on the Submit button on the Status screen to re-submit this form, as you will NOT be prompted to re-submit previously submitted forms upon closing the form</u>.
3. **Delete SBAR** will allow you to remove a previously submitted or held form from the record. Once deleted, the form is irretrievable. Select the client from the Names list and click on this button to display the Form Selection Screen. Select the form you wish to delete and click OK. ***<u>You will not be warned or asked whether you are sure about this step. The Form will immediately be deleted from the record</u>.

(2) Completing the SBAR (Not Using Access Screens & Using Forms)

1. Select the orange **Start** icon (**American Data – ECS > Write > Forms > Start**). Select the appropriate resident from the Names list and click OK. The Form Types screen will display. Select "**Rehosp. – SBAR 4.0**" and click OK. Next, the Form Name screen will display. Select "**SBAR v4**" and click **OK**. The form will load.
    a. If you receive a message stating "There is a form in progress for this client," this means that a previous started SBAR form was not submitted. The prior form must be completed before a new one can be started.
2. Click on **Status** at the bottom of the screen, click **Collect**, and click OK in the Collect pop up box. Previous entries about the resident will populate the form.
3. Complete page 1 of the form by adding check marks and text in the appropriate fields. When you have completed page 1, select the **Save** button at the bottom. Process in the same way though pages 2-4.
4. When the entire form has been completed and saved, close out of the form. A pop-up screen will ask, "Would you like to submit this form?" Select **Yes**. The form will submit and close.

Additional SBAR Functions

1. To view an SBAR form that was previously completed, select the orange **View** icon. Select a resident from the Name Selection screen and click on OK. The Form Types screen will display. Select "**Rehosp. – SBAR 4.0**" and click OK. The Form Selection Screen will appear with any past SBAR forms listed. If the screen is blank, no SBARs have been completed for this resident. The Status column will show you whether the form(s) are Submitted or Held. Typically, all forms should be submitted unless a nurse was interrupted while completing it and has not yet returned to it. Held forms are considered incomplete and should be completed and submitted. The presence of a Held SBAR will prevent a nurse from starting another SBAR.
2. The Orange **Continue** allows you to complete a Held Form. Select the client from the Names list and click on this button to display the Form Types screen. Select the form you wish to complete/submit and click OK. The form will load. Complete the form and make sure that each page has been saved. Close out of the form. A pop-up screen will ask, "Would you like to submit this form?" Select **Yes**. The form will submit and close.
3. To make changes to a previously completed SBAR, go to **American Data – ECS > Write > Forms > Change**. Select the client from the Name Selection screen and click OK to display the Form Selection screen. Select the form you wish to edit and click OK to load the form. Make any needed changes and click the **Status** button at the bottom to make sure that each of the pages has been saved. ***<u>You must click on the Submit button on the Status screen to re-submit this form, as you will NOT be prompted to re-submit previously submitted forms upon closing the form</u>.
4. To delete an SBAR that you do not want in the client's record, go to **American Data – ECS > Write > Forms > Delete**. Select the client from the Names list and click OK. The Form Types screen will display. Select "**Rehosp. – SBAR 4.0**" and click OK. Select the form you wish to delete and click OK. ***<u>You will not be warned or asked if you are sure about this step. The Form will immediately be deleted from the record</u>. ***<u>Once deleted, the form is irretrievable</u>.

(3) Completing the SBAR (Using Access Screens & Using Documentation Screens, not Forms)

1. Using the Easy Access screens, navigate to the **Rehosp. Access** screen. Select the appropriate resident from the Names list, and in click the **SBAR** button in the SBAR column. The SBAR documentation screen will load. Use the screen to enter the SBAR information, then Save and Exit.
2. View or Print the most recently documented SBAR by selecting the appropriate resident from the Names list and clicking on the **View SBAR** button. The report will display.
3. If you would like to review or edit previously documented SBAR information, use a general **View** button on another access screen and select **Rehospitalizations/SBAR 4.0** as your topic. Proceed as usual.

(4) Completing the SBAR (Not Using Access Screens & Using Documentation Screens, not Forms)

1. Select the **Write** icon and the desired name. Click OK. Click the **Topic** button, select **Rehospitalizations/SBAR 4.0**, and click OK. The SBAR documentation screen will load. Use the screen to document the SBAR information, then Save and Exit.
2. To view or print the most recently documented SBAR, select the green **Reports** icon. Choose the client and click OK. On the Report Selection screen, select 4 reports by holding the CTRL button on the keyboard: **INTERACT – 4.0 SBAR pg. 1 – pg. 4**. Select **Preview** and then OK.
3. View and edit entries in the SBAR topic using usual methods.

Hospital Rate Tracking Tool

The Hospital Rate Tracking Tool is a set of graphs that provide analytical data about re-hospitalizations. The graphs pull this data from information recorded on the Hospital Admit/Transfer Log. This log should be completed any time a resident is admitted from the hospital, or had a hospital stay in the 30 days prior to admission, as well as any time an unplanned transfer to an acute care hospital occurs.

Documenting Hospital Admission and Transfer Data (2 sets of Instructions follow)

(1) Hospital Admit/Transfer Log (Using Access Screens)

1. Using the Easy Access screens, navigate to the **Rehosp. Access** screen. Select the appropriate resident from the Names list, and in the Rehospitalization Data column, select the **Hosp. Admit/ Transfer Log** button. The form will load.
    a. If you receive a message stating "There is a form in progress for this client," this means that a previously started SBAR form was not submitted. The prior form must be completed before a new one can be started.
2. Click on **Status** at the bottom of the screen, click **Collect**, and click OK in the Collect pop up box. Information about the resident will populate the form.
3. Start by indicating if the form is being completed for an admission or for an unplanned transfer. This will activate the appropriate portions of the form. Complete open questions as indicated. When you are done, select the Save button at the bottom.
4. Select the **Close** button to close out of the form. A pop-up screen will ask, "Would you like to submit this form?" Select **Yes**. The form will submit and close.

Additional Admit/Transfer Log Access Buttons

1. **View Admit/Transfer Log** allows you to view previous forms. Select a resident from the Names list and click on this button. The Form Selection Screen will appear with any past Admit/Transfer Logs listed. If the screen is blank, no Admit/Transfer Logs have been completed for this resident. The Status column will show you if the form(s) are

Submitted or Held. Typically, all forms should be submitted unless a nurse was interrupted while completing it and has not returned to it yet. Held forms are considered incomplete and should be completed and submitted. The presence of a Held Admit/Transfer Log will prevent a nurse from starting another Admit/Transfer Log.

2. **Edit Admit/Transfer Log** allows you to make changes to a previous form. The forms may be Submitted or Held. Select the client from the Names list and click on this button to display the **Form Selection** screen. Select the form you wish to edit or complete/submit and click OK. The form will load. Make any necessary changes and click the **Status** button at the bottom to make sure that each of the pages has been saved. ***<u>You must click on the Submit button on the Status screen to re-submit this form, as you will NOT be prompted to re-submit previously submitted forms upon closing the form</u>.
3. **Delete Admit/Transfer Log** will allow you to remove a previously submitted or held form from the record. Once deleted, the form is irretrievable. Select the client from the Names list and click on this button to display the **Form Selection Screen**. Select the form you wish to delete and click OK. ***<u>You will not be warned or asked if you are sure about this step. The Form will immediately be deleted from the record</u>.

Manual Census Documentation (if Census is not kept up in ECS)

Prior to documenting, you need to know both the Post-Acute and Long-Term total census days for the month you are recording.

1. On the Rehosp. Access screen select the *INTERACT Data resident from the Names list, and in the Rehospitalization Data column, select the Manual Census Documentation button. The Manual Census Data documentation screen will load.
2. Select **Post-Acute Census Total:** and use the number pad to enter the days.
3. Select **Chronic LTC Census Total:** and use the number pad to enter the days.
4. Select **Total Census:** and the total will automatically populate.
5. Select **Month:** and select the last day of the month you are entering data for.
6. Click on the **Sign** button to save the entry and exit the screen.

(2) Hospital Admit/Transfer Log (Not Using Access Screens)

1. Select the orange **Start** icon (**American Data – ECS > Write > Forms > Start**). Select the appropriate resident from the Names list and click OK. The Form Types screen will display. Select "**Rehosp. – Admit/Transfer Data**" and click OK. Next, the Form Name screen will display. Select "**Hospital Admit/Transfer Data**" and click OK. The form will load.
    a. If you receive a message stating "There is a form in progress for this client," this means that a previous started SBAR form was not submitted. The prior form must be completed before a new one can be started.
2. Click on **Status** at the bottom of the screen, click Collect, and click OK in the Collect pop up box. Information about the resident will populate the form.

3. Start by indicating if the form is being completed for an admission or for an unplanned transfer. This will activate the appropriate portions of the form. Complete open questions as indicated. When you are done, select the **Save** button at the bottom.
4. Close out of the form. A pop-up screen will ask, "Would you like to submit this form?" Select **Yes**. The form will submit and close.

Additional Rehospitalization Data Functions

1. To view a form that was previously completed, select the orange **View** icon. Select a resident from the Name Selection screen and click on OK. The Form Types screen will display. Select "**Rehosp. – Admit/Transfer Data**" and click OK. The Form Selection Screen will appear with any past Rehosp. – Admit/Transfer Data forms listed. If the screen is blank, no Rehosp. – Admit/Transfer Data forms have been completed for this resident. The Status column will show you if the form(s) are Submitted or Held. Typically, all forms should be submitted unless a nurse was interrupted while completing it and has not returned to it yet. Held forms are considered incomplete and should be completed and submitted. The presence of a Held Rehosp. – Admit/Transfer Data form will prevent a nurse from starting another Rehosp. – Admit/Transfer Data.
2. The Orange **Continue** allows you to complete a Held Form. Select the client from the Names list and click on this button to display the Form Types screen. Select the form you wish to complete/submit and click OK. The form will load. Complete the form and make sure that each page has been saved. Close out of the form. A pop-up screen will ask, "Would you like to submit this form?" Select **Yes**. The form will submit and close.
3. To make changes to a previously completed Rehosp. – Admit/Transfer Data form, go to **American Data – ECS > Write > Forms > Change**. Select the client from the Name Selection screen and click OK to display the Form Selection screen. Select the form you wish to edit and click OK to load the form. Make any needed changes and click the **Status** button at the bottom to make sure that each of the pages has been saved. ***<u>You must click on the Submit button on the Status screen to re-submit this form, as you will NOT be prompted to re-submit previously submitted forms upon closing the form</u>.
4. To delete a Rehosp. – Admit/Transfer Data form that you do not want in the client's record, go to **American Data – ECS > Write > Forms > Delete**. Select the client from the Names list and click OK. The Form Types screen will display. Select "**Rehosp. – Admit/Transfer Data**" and click OK. Select the form you wish to delete and click OK. ***<u>You will not be warned or asked if you are sure about this step. The Form will immediately be deleted from the record</u>. ***<u>Once deleted, the form is irretrievable</u>.

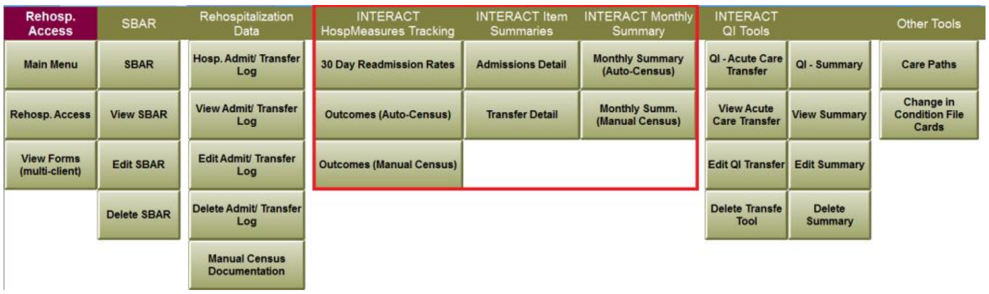
Manual Census Documentation (if Census is not kept up in ECS)

Prior to documenting, you need to know both the Post-Acute and Long-Term total census days for the month you are recording.

1. Select the **Write** icon, select the ***INTERACT Data** resident from the Names list, and click OK. Click the **Topic** button, select **Rehospitalizations/Manual Census Documentation**, and click OK.
2. Select **Post-Acute Census Total:** and use the number pad to enter the days.
3. Select **Chronic LTC Census Total:** and use the number pad to enter the days.
4. Select **Total Census:** and the total will automatically populate.
5. Select **Month:** and select the last day of the for which you are entering data.
6. Click on the **Sign** button to save the entry and exit the screen.

Running INTERACT Hospitalization Measures Tools (Graphs) (2 sets of Instructions)

(1) Running INTERACT Hosp. Measures (Using Access Screens)



1. **30 Day Readmission Rates** – this report displays 12 months of data about readmission rates in 1-month intervals.
   a. Prior to selecting this button, filter for all Active, Hold, Inactive, and Closed Account residents for the data to be accurate. Select all these names.
   b. When you select this button, you will be prompted to select dates. The report may be run for any 12-month period, but if you want to match traditional INTERACT reporting, select January 1st – December 31st of the calendar year for which you are running the data.
2. **Outcomes** – this report displays 12 months of data about ED visits, Observation Stays, and Hospital Admissions in 1-month intervals.
   a. Prior to selecting this button, filter for all Active, Hold, Inactive, and Closed Account residents for the data to be accurate. Select all these names.
   b. When you select this button, you will be prompted to select dates. The report may be run for any 12-month period, but if you want to match traditional INTERACT reporting, select January 1st – December 31st of the calendar year for which you are running the data.
3. **Admission Detail** – this report displays up to 12 months of data and is intended to be a year-to-date summary about admissions to your facility from hospitals.
   a. Prior to selecting this button, filter for all Active, Hold, Inactive, and Closed Account residents for the data to be accurate. Select all these names.
   b. When you select this button, you will be prompted to select dates. The report may be run for any 12-month period, but if you want to match traditional

INTERACT reporting, select January 1st – December 31st of the calendar year for which you are running the data.

4. **Transfer Detail** – this button is linked to three reports that display up to 12 months of data and is intended to be a year-to-date summary about transfers to the hospital.
    a. Prior to selecting this button, filter for all Active, Hold, Inactive, and Closed Account residents for the data to be accurate. Select all these names.
    b. When you select this button, a pop-up screen will present the three Transfer detail reports. To print them all, click OK. To print just one or two, select them from the list and then click OK. For each report, you will be prompted to select dates (if you run all three, you must select dates three times). The reports may be run for any 12-month period, but if you want to match traditional INTERACT reporting, select January 1st – December 31st of the calendar year for which you are running the data.
5. **Monthly Summary** – this report summarizes the information on the other reports together onto one page. It displays one month of data.
    a. Prior to selecting this button, filter for all Active, Hold, Inactive, and Closed Account residents for the data to be accurate. Select all these names.
    b. When you select this button, you will be prompted to select dates. The report may be run for anyone-month period.

(2) Running INTERACT Hosp. Measures (Not Using Access Screens)

1. **30 Day Readmission Rates** – this report displays 12 months of data about readmission rates in 1-month intervals.
    a. Prior to selecting this button, filter for, and select, all Active, Hold, Inactive, and Closed Account residents for the data to be accurate.
    b. Select **INTERACT 30 Day Readmission Rate**, put a check mark into Preview, and click OK; you will be prompted to select dates. The report may be run for any 12-month period, but if you want to match traditional INTERACT reporting, select January 1st – December 31st of the calendar year for which you are running the data.
2. **Outcomes** – this report displays 12 months of data about ED visits, Observation Stays, and Hospital Admissions in 1-month intervals.
    a. Select the green **Graphs** button. The Name selection screen will appear. Filter for, and select, all Active, Hold, Inactive, and Closed Account residents for the data to be accurate.
    b. Select **INTERACT Hosp. Measures - Outcomes**, put a check mark into Preview, and click OK; you will be prompted to select dates. The report may be run for any 12-month period, but if you want to match traditional INTERACT reporting, select January 1st – December 31st of the calendar year for which you are running the data.
3. **Admission Detail** – this report displays up to 12 months of data and is intended to be a year-to-date summary about admissions to your facility from hospitals.

   a. Select the green **Graphs** button. The Name selection screen will appear. Filter for, and select, all Active, Hold, Inactive, and Closed Account residents for the data to be accurate.
   b. Select **INTERACT Item Summary - Admissions**, put a check mark into **Preview**, and click OK; you will be prompted to select dates. The report may be run for any 12-month period, but if you want to match traditional INTERACT reporting, select January 1st – December 31st of the calendar year for which you are running the data.
4. **Transfer Detail** – this is made up of three reports that display up to 12 months of data and is intended to be a year-to-date summary about transfers to the hospital.
   a. Select the green **Graphs** button. The Name selection screen will appear. Filter for, and select, all Active, Hold, Inactive, and Closed Account residents for the data to be accurate.
   b. Select one or all **INTERACT Item Summary – Transfers 1, 2,** and **3,** put a check mark into Preview, and click OK; you will be prompted to select dates. The reports may be run for any 12-month period, but if you want to match traditional INTERACT reporting, select January 1st – December 31st of the calendar year for which you are running the data.
5. **Monthly Summary** – this report summarizes the information on the other reports together onto one page. It displays one month of data.
   a. Select the green **Graphs** button. The Name selection screen will appear. Filter for, and select, all Active, Hold, Inactive, and Closed Account residents for the data to be accurate.
   b. Select **INTERACT Monthly Summary**, put a check mark into **Preview**, and click OK; you will be prompted to select dates. The report may be run for anyone-month period.

QI Tool for Review of Acute Care Transfers (4 sets of Instructions follow)

(1) Completing the QI Transfer Tool (Using Access Screens & Using Forms)

1. Using the Easy Access screens, navigate to the **Rehosp. Access** screen. Select *INTERACT Data from the Names list and select the **QI – Acute Care Transfer** button from the INTERACT QI Tools column. The Transfer Tool will load.
   a. If you receive a message stating "There is a form in progress for this client," this means that a previously started QI – Transfer Tool form was not submitted. The incomplete form must be completed before a new one can be started.
2. Click on **Status** at the bottom of the screen, click **Collect**, and click OK in the Collect pop up box. Information about the resident will populate the form.
3. Complete page 1 of the form by adding check marks and text in the appropriate fields. When you have completed page 1, click the **Save** button at the bottom. Process in the same way though pages 2-4.

4. When the entire form has been completed and saved, close out of the form. A dialogue box will appear, asking you, "Would you like to submit this form?" Select **Yes**. The form will submit and close.

Additional QI Tool – Acute Care Transfers Access Buttons

1. **View Acute Care Transfer** allows you to View previous forms. Select *INTERACT data from the Names list and click on this button. The Form Selection Screen will appear with any past forms listed. If the screen is blank, no Acute Care Transfer Tools have been completed for this resident. The Status column will show you whether the form(s) are Submitted or Held. Typically, all forms should be submitted unless a nurse was interrupted while completing it and has not yet returned to it. Held forms are considered incomplete and should be finished and submitted. The presence of a Held form will prevent a nurse from starting another one.
2. **Edit QI Transfer** allows you to make changes to a previous form. The forms may be Submitted or Held. Choose the *INTERACT Data client from the Names list and click on this button to display the Form Selection Screen. Select the form you wish to edit or complete/submit and click OK. The form will load. Make any necessary changes and click the **Status** button at the bottom to make sure that each of the pages has been saved. ***<u>You must click on the Submit button on the Status screen to re-submit this form, as you will NOT be prompted to re-submit previously submitted forms upon closing the form</u>.
3. **Delete Transfer Tool** will allow you to remove a previously submitted or held form from the record. Once deleted, the form is irretrievable. Select the *INTERACT Data from the Names list and click on this button to display the Form Selection Screen. Select the form you wish to delete and click OK. ***<u>You will not be warned or asked whether you are sure about this step. The Form will immediately be deleted from the record</u>.

(2) Completing the Transfer Tool (Not Using Access Screens & Using Forms)

1. Select the orange **Start** icon (**American Data – ECS > Write > Forms > Start**). Select the *INTERACT Data name from the Names list and click OK. The Form Types screen will display. Select "**Rehosp. – QI Transfer Tool 4.0**" and click OK. Next, the Form Name screen will display. Select "**INTERACT Transfer Tool v4**" and click **OK**. The form will load.
    a. If you receive a message stating "There is a form in progress for this client," this means that a previously started form was not submitted. The prior form must be completed before a new one can be started.
2. Complete page 1 of the form by adding check marks and text in the appropriate fields. When you have completed page 1, select the **Save** button at the bottom. Process in the same way though pages 2-4.

3. When the entire form has been completed and saved, close out of the form. A pop-up screen will ask, "Would you like to submit this form?" Select **Yes**. The form will submit and close.

Additional QI Transfer Tool Functions

1. To view a QI Transfer Tool form that was previously completed, select the orange **View** icon. Select *INTERACT Data from the Name Selection screen and click on OK. The Form Types screen will display. Select "**Rehosp. – QI Transfer Tool 4.0**" and click OK. The Form Selection Screen will appear with any past forms listed. If the screen is blank, no QI Transfer Tools have been completed for this resident. The Status column will show you whether the form(s) are Submitted or Held. Typically, all forms should be submitted unless a nurse was interrupted while completing it and has not yet returned to it. Held forms are considered incomplete and should be completed and submitted. The presence of a Held form will prevent a nurse from starting another one.
2. The orange **Continue** allows you to complete a Held Form. Select *INTERACT Data from the Names list and click on this button to display the Form Types screen. Select the form you wish to complete/submit and click OK. The form will load. Complete the form and make sure that each page has been saved. Close out of the form. A pop-up screen will ask, "Would you like to submit this form?" Select **Yes**. The form will submit and close.
3. To make changes to a previously completed QI Transfer Tool, go to **American Data – ECS > Write > Forms > Change**. Select *INTERACT Data from the Name Selection screen and click OK to display the Form Selection screen. Select the form you wish to edit and click OK to load the form. Make any needed changes and click the **Status** button at the bottom to make sure that each of the pages has been saved. ***<u>You must click on the Submit button on the Status screen to re-submit this form, as you will NOT be prompted to re-submit previously submitted forms upon closing the form</u>.
4. To delete a QI Transfer Tool that you do not want, go to **American Data – ECS > Write > Forms > Delete**. Select *INTERACT Data from the Names list and click OK. The Form Types screen will display. Select "**Rehosp. – QI Transfer Tool 4.0**" and click OK. Select the form you wish to delete and click OK. ***<u>You will not be warned or asked if you are sure about this step. The Form will immediately be deleted from the record</u>. ***<u>Once deleted, the form is irretrievable</u>.

(3) Completing the QI Transfer Tool (Using Access Screens & Using Documentation Screens, not Forms)

1. Using the Easy Access screens, navigate to the **Rehosp. Access** screen. Select *INTERACT Data from the Names list, and in click the **QI – Acute Care Transfer** button in the INTERACT QI Tools column. The QI Transfer Tool documentation screen will load. Use the screen to enter information, then Save and Exit.

2. View or Print the most recently documented QI Transfer Tool by selecting the *INTERACT Data from the Names list and clicking on the **View Acute Care Transfer** button. The report will display.
3. If you would like to review or edit previously documented information, use a general **View** button on another access screen and select **Rehospitalizations/QI Tools – Acute Care Transfer** as your topic. Proceed as usual.

(4) Completing the QI Transfer Tool (Not Using Access Screens & Using Documentation Screens, not Forms)

1. Select the **Write** icon and the *INTERACT Data name. Click OK. Click the **Topic** button, select **Rehospitalizations/QI Tools – Acute Care Transfer**, and click OK. The documentation screen will load. Use the screen to document the QI Transfer information, then Save and Exit.
2. To view or print the most recently documented Transfer Tool, select the green **Reports** icon. Choose the *INTERACT Data client and click OK. On the Report Selection screen, select 4 reports by holding the CTRL button on the keyboard: **INTERACT – Review of Acute Care Transfers pg. 1 – pg. 4**. Select **Preview** and then OK.
3. View and edit entries in the QI Tools Acute Care Summary topic using usual methods.

Quality Improvement Summary Worksheet (4 sets of Instructions follow)

(1) Completing the QI Summary Worksheet (Using Access Screens & Using Forms)

1. Using the Easy Access screens, navigate to the **Rehosp. Access** screen. Select the *INTERACT Data resident from the Names list (may be Inactive) and select the **QI – Summary** button from the INTERACT QI Tools column. The Summary Tool will load.
   a. If you receive a message stating "There is a form in progress for this client," this means that a previously started QI – Summary was not submitted. The incomplete form must be completed before a new one can be started.
2. Complete page 1 of the form by adding check marks and text in the appropriate fields. When you have completed page 1, click the **Save** button at the bottom. Process in the same way though page 2.
3. When the entire form has been completed and saved, close out of the form. A dialogue box will appear, asking you, "Would you like to submit this form?" Select **Yes**. The form will submit and close.

Additional QI Tool – Summary Access Buttons

1. **View Summary** allows you to View previous forms. Select the *INTERACT Data resident from the Names list and click on this button. The Form Selection Screen will appear with any past forms listed. If the screen is blank, no Summary Tools have been completed. The Status column will show you whether the form(s) are Submitted or Held. Typically, all forms should be submitted unless a nurse was interrupted while

completing it and has not yet returned to it. Held forms are considered incomplete and should be finished and submitted. The presence of a Held form will prevent a nurse from starting another one.

2. **Edit Summary** allows you to make changes to a previous form. The forms may be Submitted or Held. Choose *INTERACT Data from the Names list and click on this button to display the Form Selection Screen. Select the form you wish to edit or complete/submit and click OK. The form will load. Make any necessary changes and click the **Status** button at the bottom to make sure that each of the pages has been saved. ***<u>You must click on the Submit button on the Status screen to re-submit this form, as you will NOT be prompted to re-submit previously submitted forms upon closing the form</u>.
3. **Delete Summary** will allow you to remove a previously submitted or held form from the record. Once deleted, the form is irretrievable. Select the *INTERACT Data name and click on this button to display the Form Selection Screen. Select the form you wish to delete and click OK. ***<u>You will not be warned or asked whether you are sure about this step. The Form will immediately be deleted from the record</u>.

(2) Completing the QI Summary (Not Using Access Screens & Using Forms)

1. Select the orange **Start** icon (**American Data – ECS > Write > Forms > Start**). Select *INTERACT Data from the Names list and click OK. The Form Types screen will display. Select "**Rehosp. – QI Summary Worksheet 4.0**" and click OK. Next, the Form Name screen will display. Select "**INTERACT Summary v4**" and click **OK**. The form will load.
   a. If you receive a message stating "There is a form in progress for this client," this means that a previously started form was not submitted. The prior form must be completed before a new one can be started.
2. Click on **Status** at the bottom of the screen, click **Collect**, and click OK in the Collect pop up box. Previous entries about the resident will populate the form.
3. Complete page 1 of the form by adding check marks and text in the appropriate fields. When you have completed page 1, select the **Save** button at the bottom. Process in the same way though page 2.
4. When the entire form has been completed and saved, close out of the form. A pop-up screen will ask, "Would you like to submit this form?" Select **Yes**. The form will submit and close.

Additional QI Summary Functions

1. To view a QI Summary form that was previously completed, select the orange **View** icon. Select *INTERACT Data from the Name Selection screen and click on OK. The Form Types screen will display. Select "**Rehosp. – QI Summary Worksheet 4.0**" and click OK. The Form Selection Screen will appear with any past forms listed. If the screen is blank, no QI Summaries have been completed. The Status column will show you whether the form(s) are Submitted or Held. Typically, all forms should be

submitted unless a nurse was interrupted while completing it and has not yet returned to it. Held forms are considered incomplete and should be completed and submitted. The presence of a Held form will prevent a nurse from starting another one.

2. The orange **Continue** allows you to complete a Held Form. Select *INTERACT Data from the Names list and click on this button to display the Form Types screen. Select the form you wish to complete/submit and click OK. The form will load. Complete the form and make sure that each page has been saved. Close out of the form. A pop-up screen will ask, "Would you like to submit this form?" Select **Yes**. The form will submit and close.
3. To make changes to a previously completed QI Summary, go to **American Data – ECS > Write > Forms > Change**. Select *INTERACT Data from the Name Selection screen and click OK to display the Form Selection screen. Select the form you wish to edit and click OK to load the form. Make any needed changes and click the **Status** button at the bottom to make sure that each of the pages has been saved. ***<u>You must click on the Submit button on the Status screen to re-submit this form, as you will NOT be prompted to re-submit previously submitted forms upon closing the form</u>.
4. To delete a QI Summary that you do not want in the client's record, go to **American Data – ECS > Write > Forms > Delete**. Select *INTERACT Data from the Names list and click OK. The Form Types screen will display. Select "**Rehosp. – QI Summary Worksheet 4.0**" and click OK. Select the form you wish to delete and click OK. ***<u>You will not be warned or asked if you are sure about this step. The Form will immediately be deleted from the record</u>. ***<u>Once deleted, the form is irretrievable</u>.

(3) Completing the QI Summary (Using Access Screens & Using Documentation Screens, not Forms)

1. Using the Easy Access screens, navigate to the **Rehosp. Access** screen. Select *INTERACT Data from the Names list, and in click the **QI – Summary** button in the INTERACT QI Tools column. The QI Summary documentation screen will load. Use the screen to enter information, then Save and Exit.
2. View or Print the most recently documented QI Transfer Tool by selecting *INTERACT Data from the Names list and clicking on the **View Summary** button. The report will display.
3. If you would like to review or edit previously documented information, use a general **View** button on another access screen and select **Rehospitalizations/QI Tools – Summary** as your topic. Proceed as usual.

(4) Completing the QI Summary (Not Using Access Screens & Using Documentation Screens, not Forms)

1. Select the **Write** icon and the *INTERACT Data name. Click OK. Click the **Topic** button, select **Rehospitalizations/QI Tools – Summary**, and click OK. The documentation

screen will load. Use the screen to document the QI Summary information, then Save and Exit.

2. To view or print the most recently documented QI Summary Worksheet, select the green **Reports** icon. Choose *INTERACT Data and click OK. On the Report Selection screen, select 2 reports by holding the CTRL button on the keyboard: **INTERACT – Review of Acute Care Transfers pg. 1 – pg. 2**. Select **Preview** and then OK.
3. View and edit entries in the QI Summary topic using the usual methods.