**Purpose:** Standard process for handoff of patient between MA and provider to communicate critical needs of the patient

**Who:** Provider, MA

**Tools/Supplies Required:** Handoff Checklist

*Revised*:

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **What** | **How** | **Why** |
|  | **MA to Provider Handoff** |  |  |
| 1 | MA completes Rooming  |  |  |
| 2 | MA enters Room # and Time Ready in EPIC | * MA enters Room # and Time Ready in EMR
* For first patient of day, also tell provider patient is ready
 |  |
| 3 | If in person, MA and provider huddle and communicate patient needs  | Capture:* Priority issues
* Additional concerns
* Abnormal vitals
* Extraordinary moods
* HM due or refused/ other info requested
* Outstanding results (e.g., not interfaced)
* Time check & countermeasure (e.g., on time vs. behind; if behind - plans to get back on track)
* “She has many concerns but really wants to focus on …”
* “BP is very high…”
* “He is very upset about…”
* “She was in the hospital last night, I will get the records”
* “He is refusing the colonoscopy…”
* “Because we are behind, I am going to block our 11am open slot”
 |   |
| 4 | If unable to handoff in person, MA fills out checklist and leaves on exam room door | * MA completes handoff checklist and places it in the exam room door
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