**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*:

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| --- | --- | --- | --- |
| **#** | **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 |  |