

***Instructions for completing the  
Quality Improvement Tool for  
review of acute care transfers***



**Purpose:**

The purpose of this tool is to review transfers in order to identify opportunities to improve the identification, evaluation, and management of changes in resident condition and other situations that commonly result in transfers, and when feasible and safe, to prevent transfers to the hospital. This tool is intended to be completed retrospectively after the transfer to look back and identify opportunities for improvement in reducing preventable transfers.

Consistent use of this tool will help your nursing home:

- Understand the reasons for acute care transfers of your residents
- Identify possible opportunities to prevent avoidable transfers

**When to use:**

The tool will provide the most useful information if it is completed within 24-48 hours after a resident is transferred to the emergency room or admitted to the hospital. People involved in the review are more likely to remember details of the transfer and the factors that influenced it if the review closely follows the event. These insights will be invaluable in generating ideas for improving care in the future.

The tool should be completed for a representative sample of acute care transfers from your facility. You are looking for common patterns among your acute care transfers to help you identify possible ways to reduce avoidable transfers and improve care for your residents. In order to detect common patterns, it is important to get into the habit of analyzing enough transfers to be able to identify trends.

**Who to involve:**

There are a variety of ways to carry out the review process. You can integrate this tool within your nursing home's usual quality improvement process – or you might convene a new group to focus on acute care transfers. There may be one staff member who completes all of the reviews or a team of reviewers. In all cases, the staff member(s) completing the form will need to talk to the CNAs and nurses who cared for the resident in the days preceding and on the day of the transfer to obtain all of the necessary information. Consider involving rehab staff or support staff such as activities or dietary

aides who may come in regular contact with the resident when reviewing events prior to the transfer. Family members may also have important information about the resident to contribute to the review.

### **Helpful hints:**

- **Complete all sections of the tool:** The tool is designed to help guide you through a brief but comprehensive analysis of key factors that often lead to unplanned and potentially avoidable transfers.
- **Complete each section in order:** There is an underlying order to the questions in the tool. The analysis starts with the events of the transfer and helps analyze important factors leading up to it.
- **Involve staff members who participate in the processes covered by the review:** Staff members involved in the transfer process may provide critical information about what worked, what didn't, and how to improve transfers in the future.
- **Be specific when describing opportunities for improvement in Section 5.** Vague suggestions will not yield system or process improvement. Consider small, sequential improvements that can be tried on the very next transfer. If a transfer is determined to have been avoidable, be sure to link the plan for improvement to the reason the transfer was deemed to be avoidable.