

Steps to create an agreement

Step	Activities	Application
1. Evaluate current transfer practices.	Review the following details (if applicable): <ul style="list-style-type: none"> • Transfer log and audit tool • Performance improvement process (using defined metrics) • Communication process for follow-up with receiving facilities • Guidelines that outline procedural and administrative policies for transferring patients to facilities that provide specialized care or services not available at the referring facility 	Develop guidelines and processes to deploy agreements in the clinical setting. Consider using included guidelines as templates to develop your institution's specific guidelines and checklists to facilitate safe and expeditious transfer.
2. Identify data points.	Collect the following information: <ul style="list-style-type: none"> • Number of pediatric patients transferred • Reason for transfer • Names of transfer facilities • Names of receiving facilities • Transfer time metrics (trauma transfer agreements) 	<p>Work with the medical records department or the trauma registry to identify the number of pediatric patients transferred for additional treatment in the last two years, the reasons for transfer, and the names of the transfer and receiving facilities.</p> <p>Time metrics may be helpful to record and can include any time interval that referring and receiving hospitals wish to define, track, or improve (e.g., time between call initiation and dispatch of an interfacility ground or specialized pediatric transport team).</p> <p>Consider collaborating with a trauma program manager to expand trauma agreements to include children who are critically ill.</p>
3. Learn about requirements.	Become familiar with the following information: <ul style="list-style-type: none"> • Regulatory or licensing agency requirements regarding transfer agreements • Current local, regional, state, and federal requirements • State, regional, and federal disaster preparedness program-related requirements (e.g., surge requirements) • State and regional trauma systems <p>See Section 4 to learn more about regulations and standards.</p>	Explore state and local regulations regarding the need for agreements. Some state regulatory agencies or hospital licensing requirements address the need for facilities to have agreements for any services they cannot provide. Such requirements could provide the impetus for administrators to support the establishment of agreements and guidelines. Additionally, some state hospital disaster preparedness programs address the need for hospitals to have transfer processes to facilitate bed availability should a disaster occur.
4. Review standards and identify gaps.	<ul style="list-style-type: none"> • Review current transfer standards. • Perform a gap analysis of the current process. 	Determine if current practices meet standards and set requirements. Areas not meeting standards and requirements are gaps in practice that should be addressed through the creation of interfacility transfer guidelines and program quality improvement (QI) plans.
5. Prepare talking points.	Talking points should include the following details: <ul style="list-style-type: none"> • Rationale for establishing formal agreements • A list of interested parties • Data, requirements, and standards • Identified gaps within your ED that demonstrate the need for transfer agreements <p>See Section 5 for example talking points.</p>	Prepare a fact sheet to share with hospital leadership. This fact sheet can cover existing regulations if applicable, as well as supporting standards, rationale for establishing formal agreements, or a memorandum of understanding (MOU) for patient transfer when needed. Consider sharing examples of transfer agreements or MOUs with leadership.

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6. Educate staff.	<ul style="list-style-type: none"> • Know where to locate guidelines and checklists. • Determine how physicians, advanced practice providers (APP), and nursing staff document transfers. 	Ensure that agreements are current and that staff are educated about these agreements and know where to locate guidelines and checklists about interfacility transfer in the hospital procedure manual.
7. Follow up with the receiving facility.	<ul style="list-style-type: none"> • Create a process for transfer review. • Follow up with the receiving facility. <p>See example feedback forms on p. 27-30.</p>	If feasible, follow up with a receiving institution to obtain outcome information on a few transferred pediatric patients.
8. Reevaluate the QI process.	<p>Review the following components:</p> <ul style="list-style-type: none"> • Transfer log and audit tool • Performance improvement process • Communication process for follow-up with receiving facilities • Guidelines that outline procedural and administrative policies for transferring patients to facilities that provide specialized care or services not available at the referring facility 	<p>Ensure there is a process for auditing transfers, following up with sending or receiving facilities, and implementing a performance improvement plan.</p> <p>Make sure your transfer guidelines outline all procedures for interfacility transfers.</p>