

Patient Safety Debrief

June 2023

Warm handoffs and the Hotlist

The Patient Story

The daughter of an elderly patient called the Patient Resource Center (PRC) to schedule an appointment for her father who had been having **increasing weakness and fatigue**.

The call was routed to the clinic support pool and there were no appointments available until the next day. When the patient arrived at the clinic for his appointment, he was so ill he was sent directly to the Emergency Department where he was admitted to the hospital with an infection.

What We Learned

The Hot List wasn't being used for every call from a patient and some of our processes for managing messages had drifted and were not reliably being followed.

Our Plan

Short Term Plan

- Standard processes for warm handoffs, Hot List use, and message management were reviewed.
- Hot List added to the access Bar for select staff.
- Language Improvements added to the Hot List

Long Term Plan:

- New Interactive Hot List Training will be developed and standardized across roles.
- Interactive Hot List Training will be incorporated into orientation.
- Interactive Hot List Training will be an annual competency D-List for Medical Assistants, PSRs, and PRRs

Key Safety Takeaways

The Hotlist is a tool that non-clinical staff use that lists symptoms that could indicate a need for nurse triage-or that the patient's condition requires escalation to a clinician.

Non-clinical staff should **ALWAYS** use the Hotlist when taking patient calls or messages and doing a warm handoff for clinical escalation.

References:

1. [Policy 2046.00 Telephone and In-Person Triage Protocol](#)

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