

WORKPACKAGE
CST Transformational Learning

CURRICULUM TRACK:

**Health Information Management:
Foundational**

Last update 2018/03/12 (N94)



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ACTIVITY 1 – Getting Started

Learning Objectives

At the end of this activity, you will be able to:

- Login to Citrix Receiver and Cerner
- Identify Key Applications that HIM Users will use within Cerner
- Log out of Cerner

Activity 1.1 – Logging into Cerner

- 1 To log into Cerner (e.g. PowerChart) you must use a unique username and password.



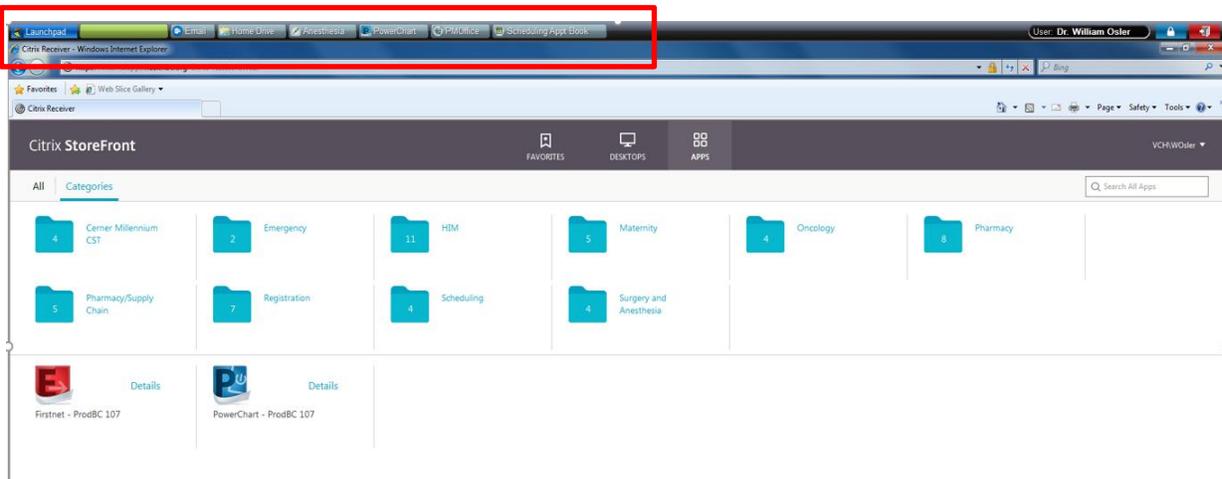
Your log-in information is confidential!

You are responsible for patient information that is accessed using your login information. DO NOT share your username and password.

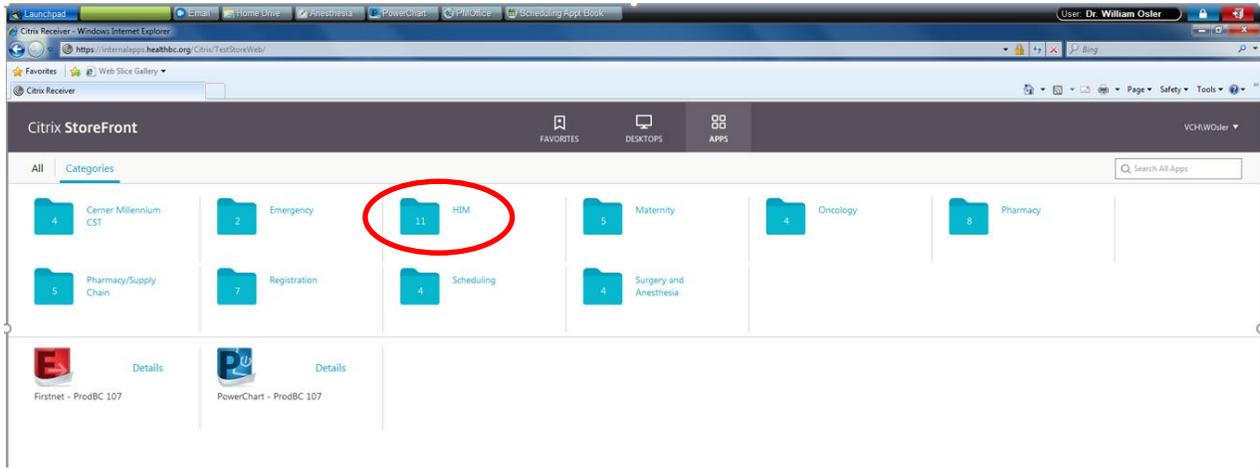


- 2 Log into your own Network Account. From your desktop: Click the **Citrix Portal** icon. You will only be required to logon to the Citrix Portal the first time you logon.
- 3 You will get the Citrix StoreFront screen displaying the applications you have access to, which will look similar to below.

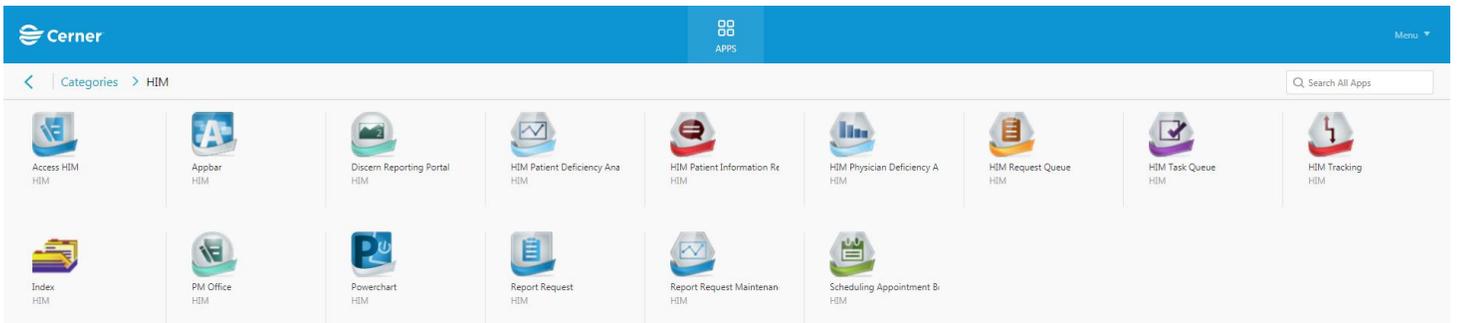
CST has created a toolbar for all devices called the Caradigm Launchpad. This toolbar will be located at the top of the display screen allowing users quick access to Citrix applications. This toolbar is customized to display the most relevant applications per department



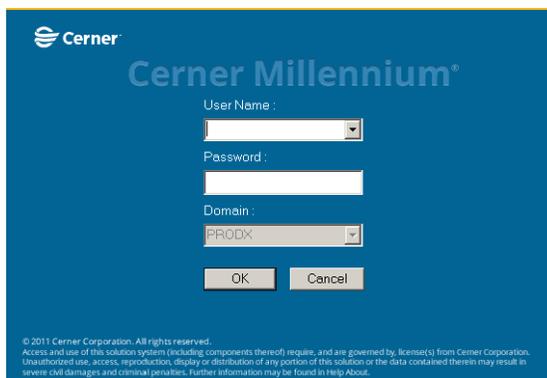
4 From the Citrix StoreFront, click on the HIM folder.



5 Within the HIM folder, you will see which Cerner applications that you will have access to. From here, you can choose which application you want to use.

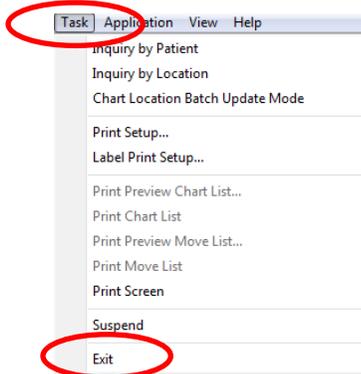


6 Whenever you click on any of the HIM applications, you will be prompted to enter your **Username** and **Password**. This is only required the first time you logon each day.

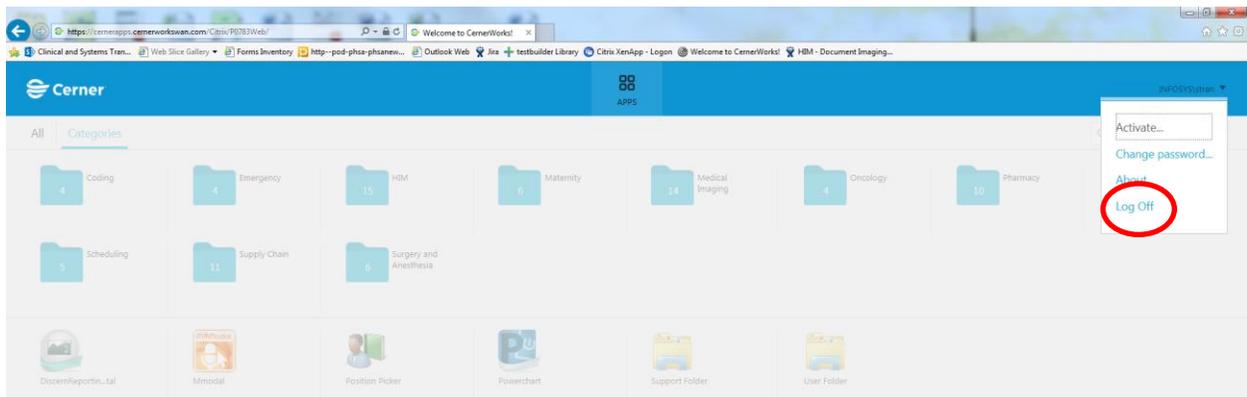


Activity 1.2 – Logging Out of Cerner

- 1 For each application you have opened, it is recommended that you click on **Task**, then **Exit**.



- 2 To logout of the Citrix StoreFront, click on the drop down area next to your user name and click 'Log Off' located at the top right-hand corner.



ACTIVITY 2 – ProFile HIM Chart Tracking

Learning Objectives

At the end of this activity, you will be able to:

- Locate a Chart in ProFile Tracking
- View Chart Movement History
- Setting-Up a Label Printer
- Create New / Additional Volume Chart Labels (Media)
- Print Labels
- Update a Charts Location
- Move Charts in Batches
- Add/View/Delete Notes
- Inquire by Location

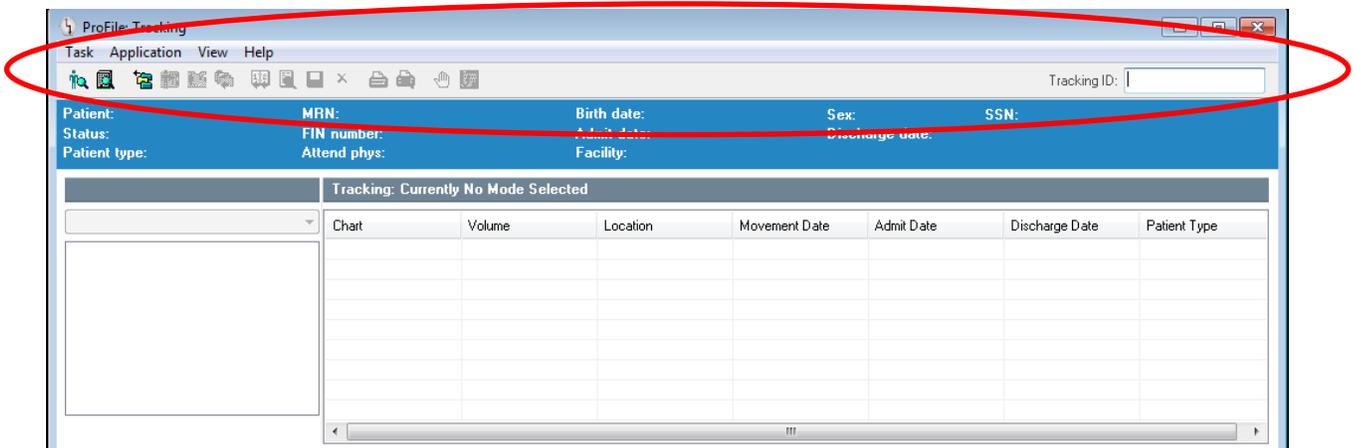
Activity 2.1 – Locate a Chart in ProFile Tracking

- 1 Click the Chart Tracking  Icon from the Citrix StoreFront.



The ProFile Tracking workspace opens.

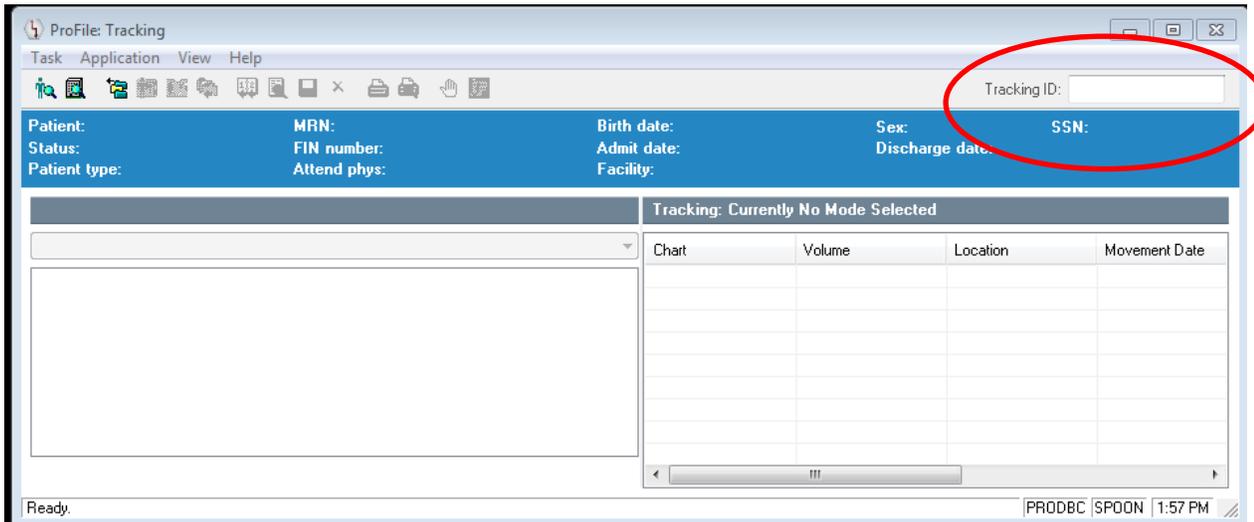
- Note the Toolbar highlights the functions you can use with this application.



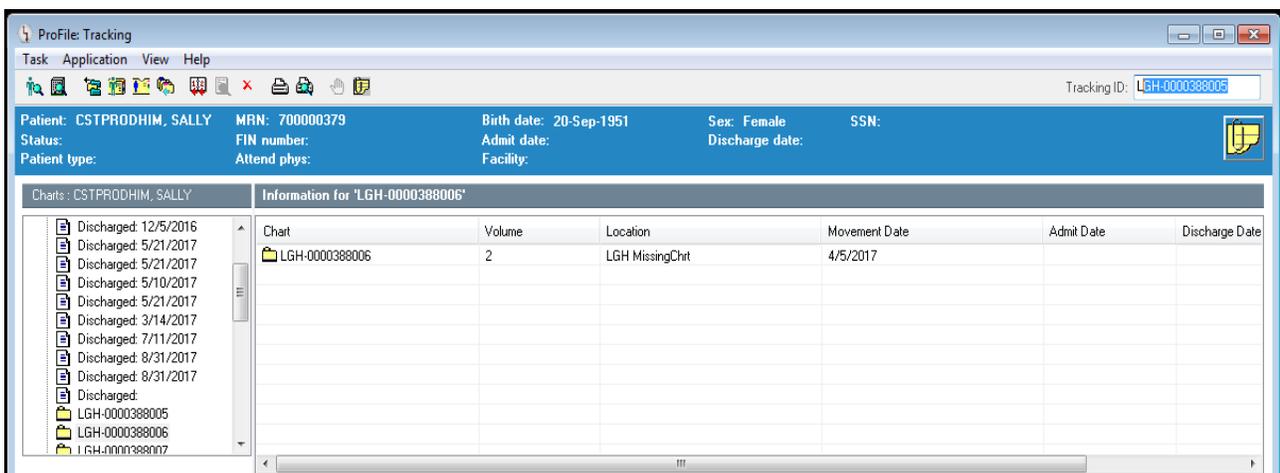
There are two ways to find the chart you wish to track.

2 If you have the patient chart...you can use the hand-held barcode scanner to scan the barcode.

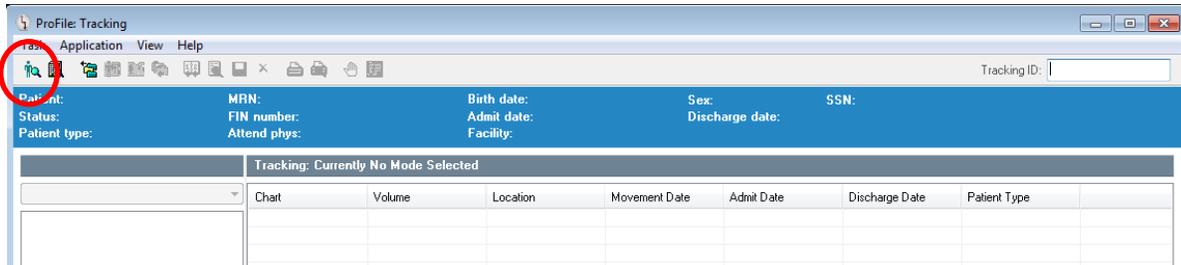
Place the cursor in the *Tracking ID* field.



Using the hand-held barcode scanner, scan the chart label/barcode. The media number (barcode) will auto-populate into the Tracking ID field and the patient's chart volumes will display.

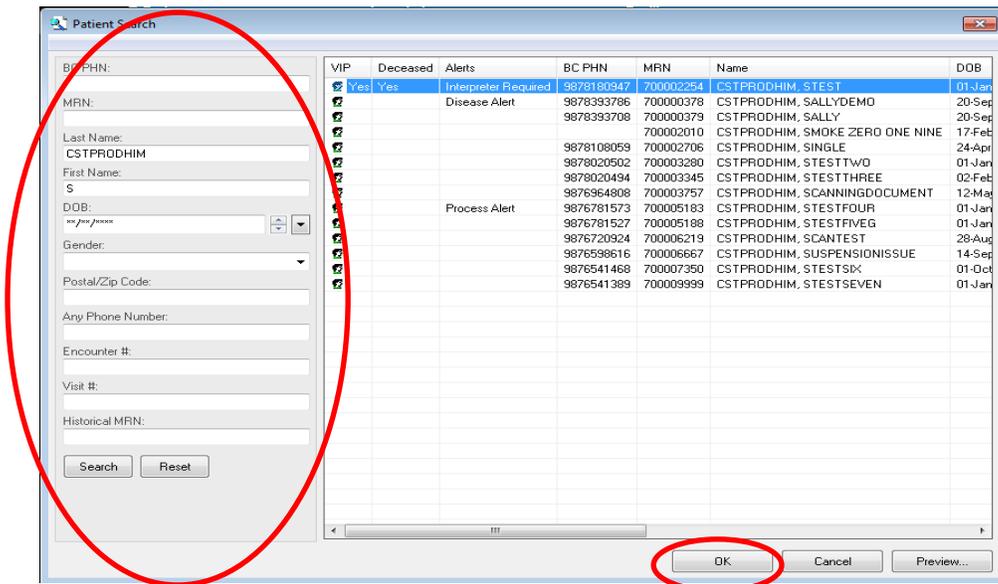


- 3 If you don't have the patient chart and you need to search for the patient, click the **Patient Search** icon.

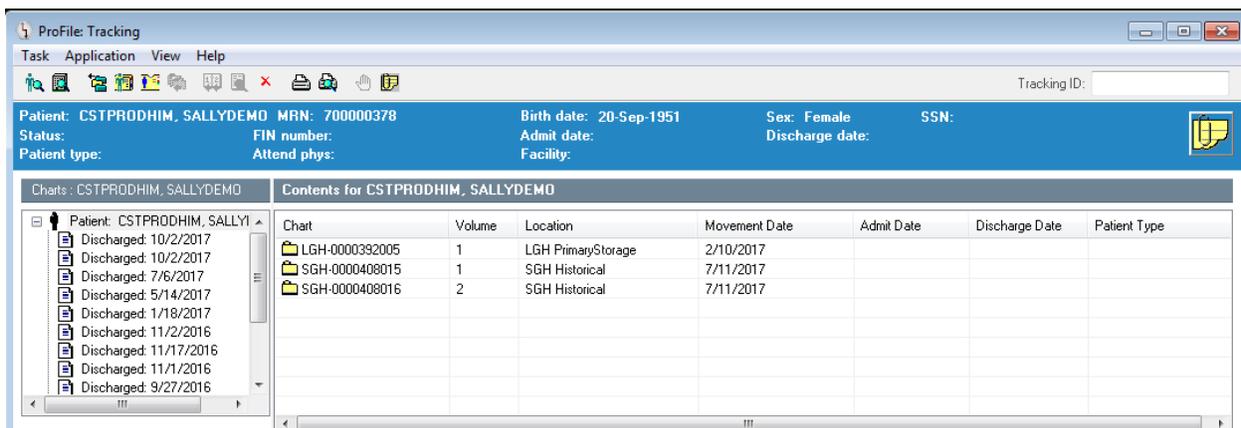


The Patient Search window will open.

You can search for a patient using several different identifiers (i.e. Cerner MRN, Historical MRN, Patient Name). Once you have entered an identifier to search by click **Search**. A list of patients will display in the right hand pane. Select the correct patient and click **OK**.



Either way the ProFile Tracking window will display the patient chart information.



Profile Tracking Screen

The screenshot shows the 'ProFile: Tracking' application window. At the top, there is a blue banner bar containing patient demographic information: Patient: CSTPRODHIM, SALLYDEMO MRN: 700000378, Birth date: 20-Sep-1951, Sex: Female, SSN: [redacted], Status: [redacted], FIN number: [redacted], Admit date: [redacted], Discharge date: [redacted], Patient type: [redacted], Attend phys: [redacted], Facility: [redacted]. Below the banner bar, there is a tree view on the left showing a list of patient encounters, each with a 'Discharged' date and a folder icon representing a chart volume. The main area on the right is a table titled 'Contents for CSTPRODHIM, SALLYDEMO' with columns: Chart, Volume, Location, Movement Date, Admit Date, Discharge Date, and Patient Type. The table contains three rows of data:

Chart	Volume	Location	Movement Date	Admit Date	Discharge Date	Patient Type
LGH-0000392005	1	LGH PrimaryStorage	10-Feb-2017			
SGH-0000408015	1	SGH Historical	11-Jul-2017			
SGH-0000408016	2	SGH Historical	11-Jul-2017			



Banner Bar – includes patient demographical information.



Listing of patients encounters followed by actual chart volumes prefixed by the facility where the chart is located. Each of the yellow folders represents a chart volume and lists the **Tracking ID** that corresponds with that chart volume.

This screenshot shows the same application window, but with the 'Information for 'LGH-0000392005'' tab selected. The left tree view shows the 'Discharged: 31-Aug-2017' folder selected, and the 'LGH-0000392005' folder is highlighted in yellow. A yellow arrow points from this folder to the 'Chart' column in the table on the right, which now displays the details for that specific chart volume:

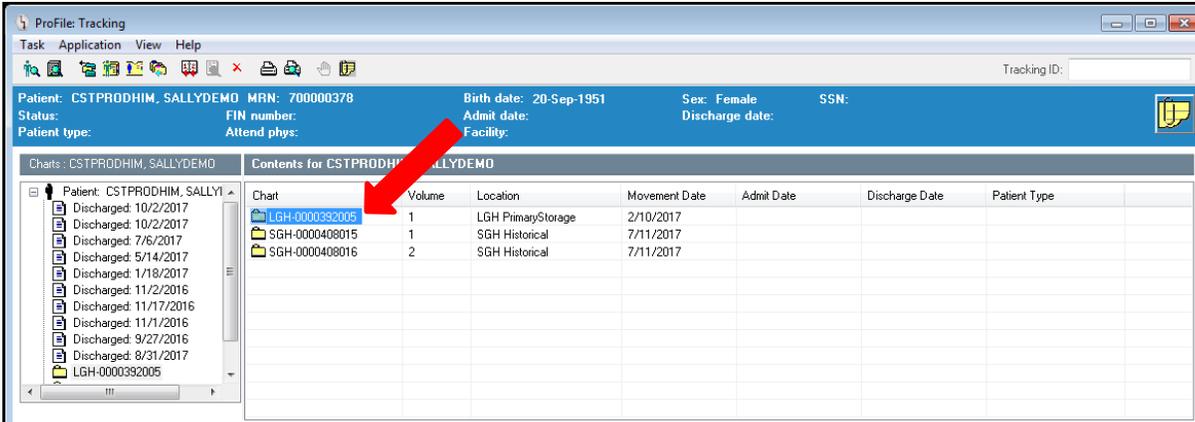
Chart	Volume	Location	Movement Date	Admit Date	Discharge Date	Patient Type
LGH-0000392005	1	LGH PrimaryStorage	10-Feb-2017			



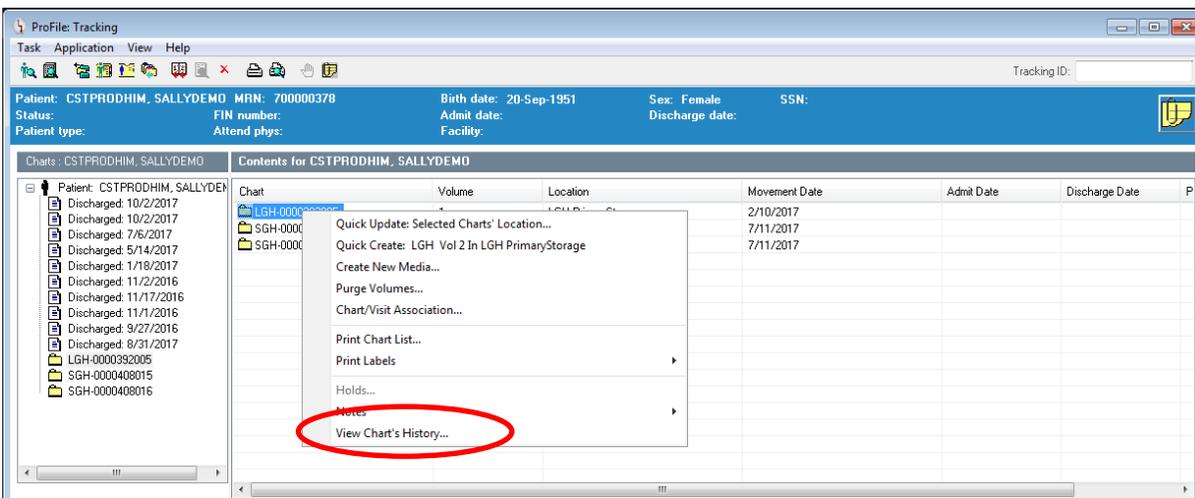
If you click on a specific chart volume, you will see the details of the current location of that chart on the right-hand side.

Activity 2.2 – View Chart Movement History

- 1 To view a chart's movement history, double-click on the desired chart volume.



OR you can right click on the desired chart volume and choose **View Charts History** from the drop down box options.



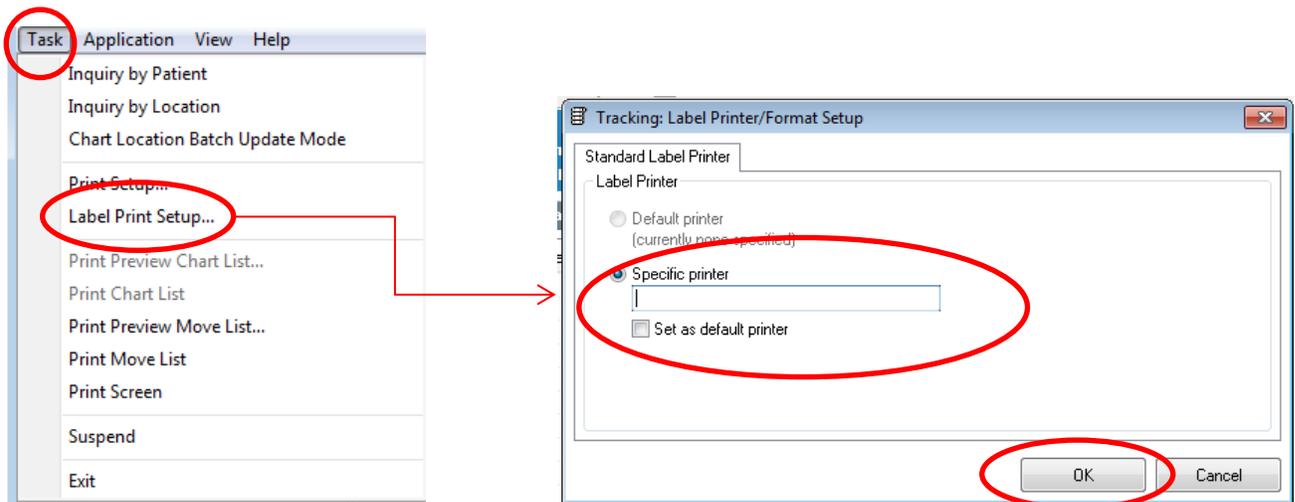
The charts movement history is displayed.

Movement History of 'LGH-0000388005' (Range: ALL)						
New Location	Previous Location	Movement Date	Mover ID	Roll	Frame	
LGH Surgical Daycare Centre	LGH PrimaryStorage	6/8/2017 10:24 AM	TEST.HIMMGR			
LGH PrimaryStorage	LGH SecuredCharts	3/29/2017 12:47 PM	TEST.HIMCLERK			
LGH SecuredCharts	LGH PrimaryStorage	3/29/2017 10:03 AM	TEST.HIMCLERK			
LGH PrimaryStorage	EGH 1 North	2/16/2017 3:12 PM	HIMTEST.MGR			
EGH 1 North		1/17/2017 7:52 AM	MAGGIE.SCHNEI...			

Activity 2.3 Setting-Up a Label Printer

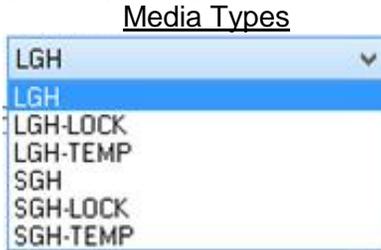
- 1 To set-up a label printer, you only have to do this once. After set-up, that printer will be defaulted as your default label printer.

Click on **Task** and select **Label Print Setup...**. Enter printer details in the Specific printer field. Click on **Set as default printer** and click **OK**.



Activity 2.4 – Create New / Additional Volume Chart Labels (Media)

In ProFile, a chart volume is referred to as a Unit Record (UR). A UR can have several different “media types” depending on the reason the volume is being created. There are 3 media types:



LGH/SGH:	Regular Volume
LGH/SGH-LOCK:	Secured Volume
LGH/SGH-TEMP:	Missing Volume

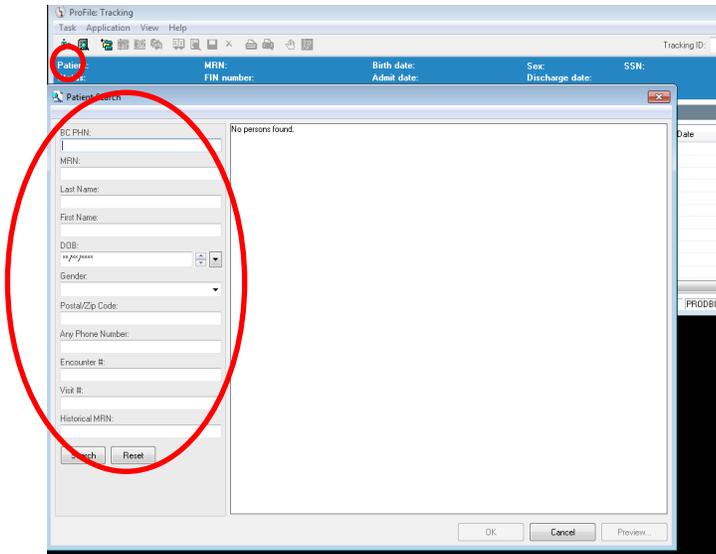
There will be no transfer of existing chart tracking information from any legacy systems (i.e. Softmed). Therefore, you will need to enter chart location information on a go forward basis as charts move in and out of the department into ProFile Chart Tracking.

The system does not allow you to just create any volume, you must create volumes sequentially; therefore, you will need to create all volumes that the site has into ProFile Chart Tracking even though you may only need to move the last volume.

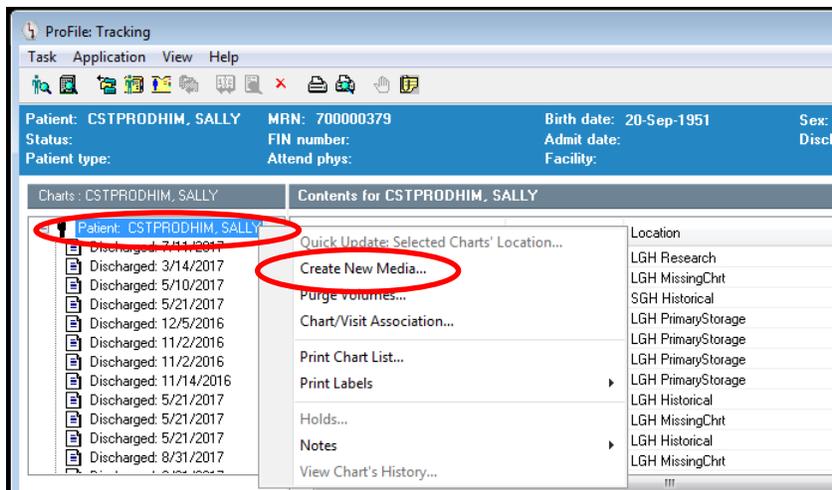
An Internal HIM location has been created specifically to address the situation when you don't exactly know where the volumes are located, it is called “**Historical**”. An example of when you might use the **Historical** location is when the ED calls and asks for a patient's latest volume. You don't find any charts in ProFile Chart Tracking and you proceed to check the legacy system and the patient has 5 volumes. You would need to recreate all the volumes into ProFile Chart Tracking, you can sign everything out to **Historical** and retrieve volume 5 and sign that volume out to the ED.

When creating new media always create the chart to the location the chart was retrieved from prior to moving the chart to the requesting location.

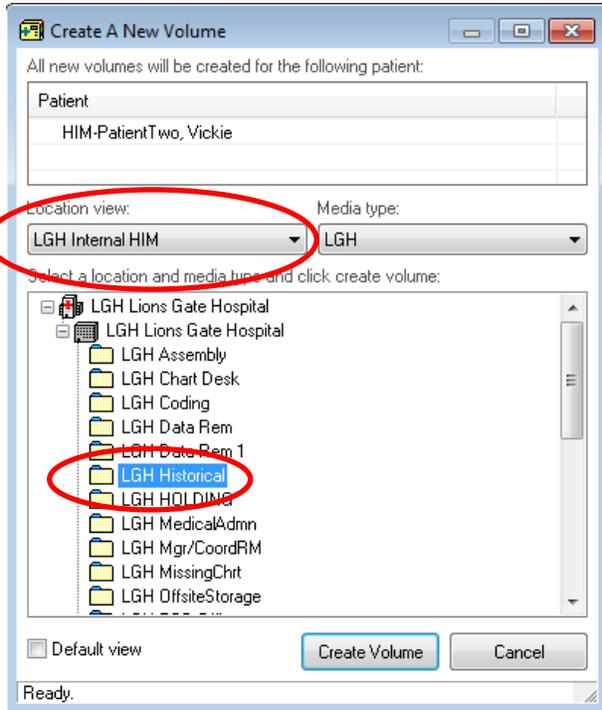
- 1 To create a new media, find the patient you want to create a new media for using the **Find Patient** icon and search for the patient using the parameters on the left (i.e. MRN, Historical MRN, Name).



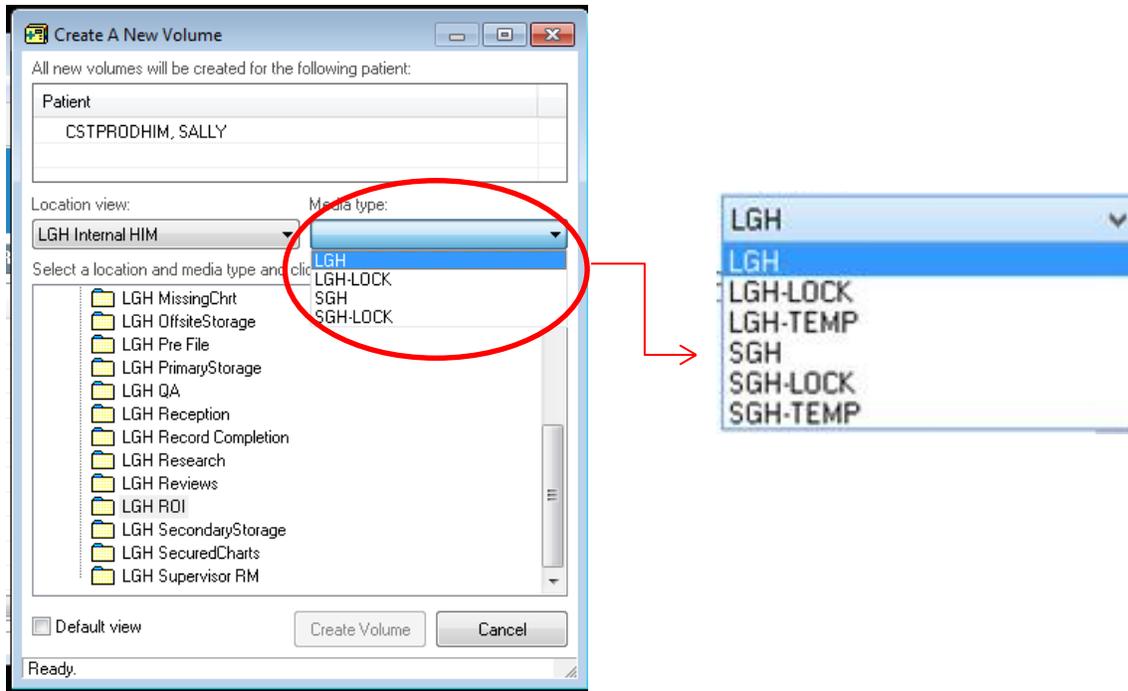
- 2 Right-click on the patient. Select **Create New Media...** from the drop-down menu.



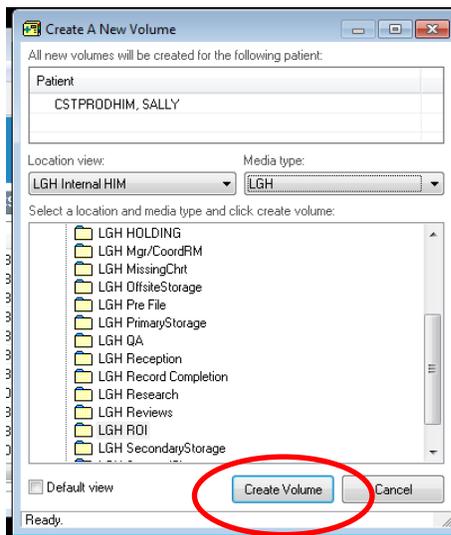
- 3 Under **Location view**, click on the drop-down arrow and choose the facility location (external or internal HIM).
Select **HISTORICAL** as the location.



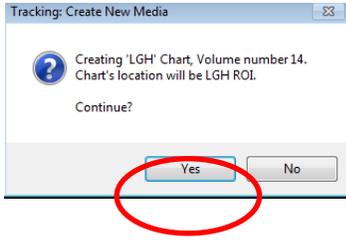
- 4 Under **Media type:** click on the drop-down arrow and select the corresponding media type.



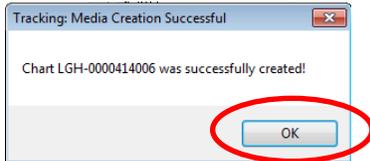
5 Click on **Create Volume**.



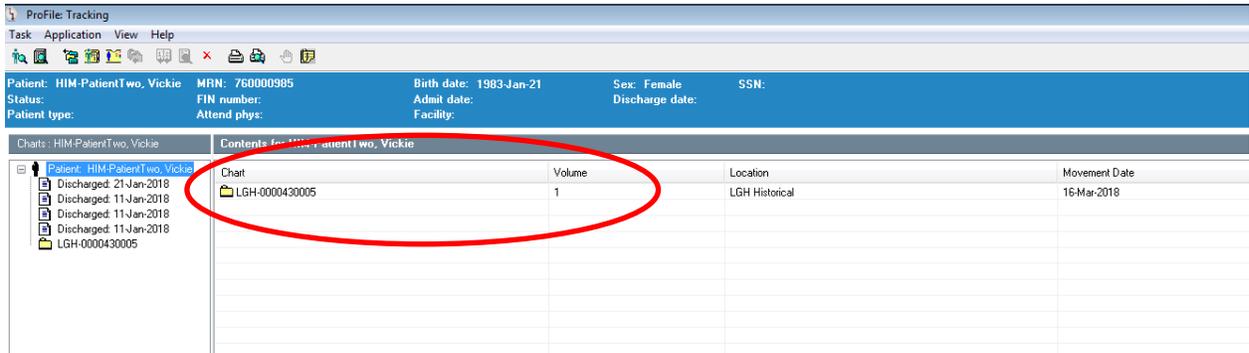
6 A pop-up window opens to validate your request, including the volume number. Click **Yes** if you wish to proceed with creating the new media.



- 7 Another pop-up window opens validating the successful creation of new media. Click **OK** to complete action.



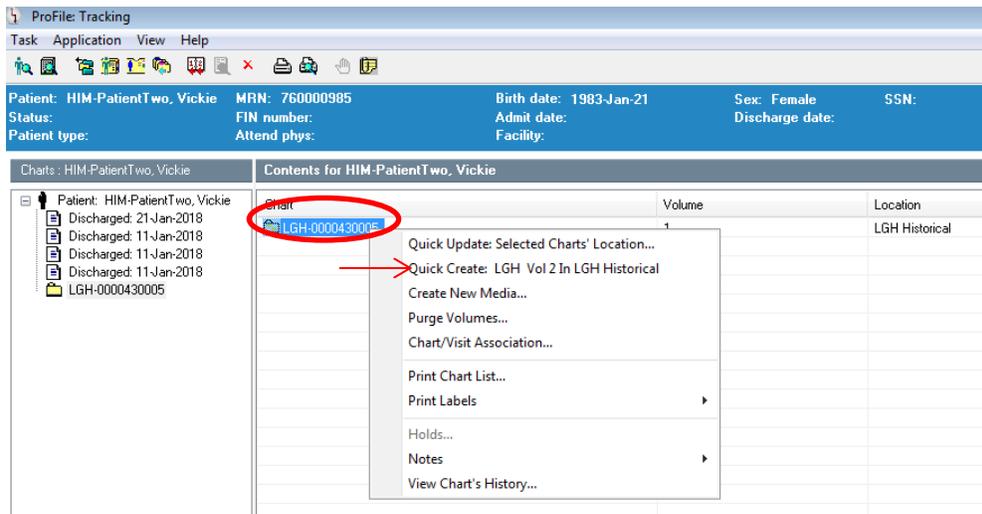
- 8 The new chart volume will be listed in the main Chart Tracking window.



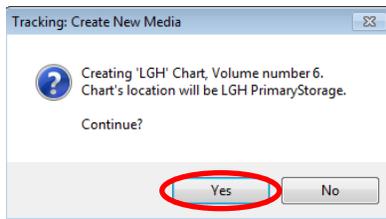
Activity 2.5 – Quick Create Function

- 1 When volumes have already been created, you can choose **Quick Create** to create the next volume **ONLY** if that new volume is to be signed out to the **same location as the last volume**.

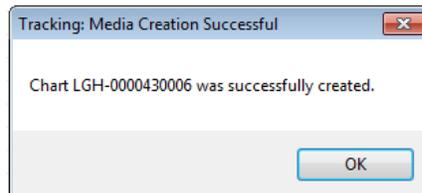
Highlight the last volume, click **Quick Create: ...**



2 You will be asked to confirm the creation of the next volume and the chart's location. Click **Yes**.



3 A box confirming the successful creation of the next volume will appear. Click **OK**.



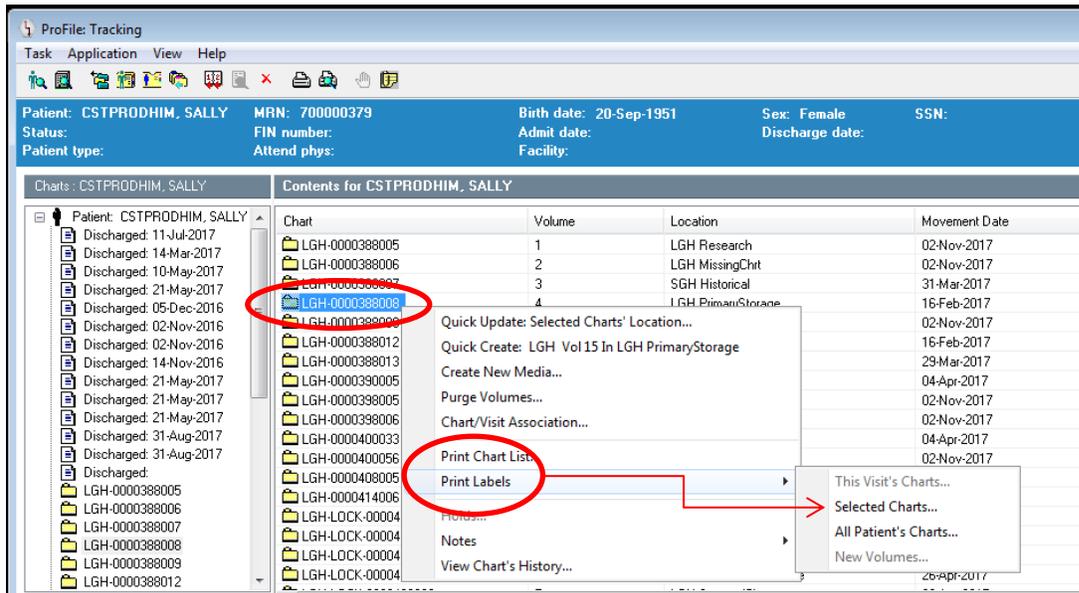
4 The volume will now appear in the chart listing.

Contents for HIM-PatientTwo, Vickie			
Chart	Volume	Location	Movement Date
LGH-0000430005	1	LGH Historical	16-Mar-2018
LGH-0000430006	2	LGH Historical	16-Mar-2018

Activity 2.6 – Print Labels

1 If the chart and the volume(s) you wish to print are already listed in ProFile Tracking and you want to print a label for them, right-click on the folder you wish to print and select **Print Labels** and

choose **Selected Charts**.



The label(s) will print to your defaulted label printer. A message will pop-up on the screen saying that the labels were successfully sent to the printer. Click **OK**.



*Note: Labels will print with “**Volume X of Y**”. It is important to cross off the “**of Y**”.*

Example: VOLUME 1 ~~of 10~~

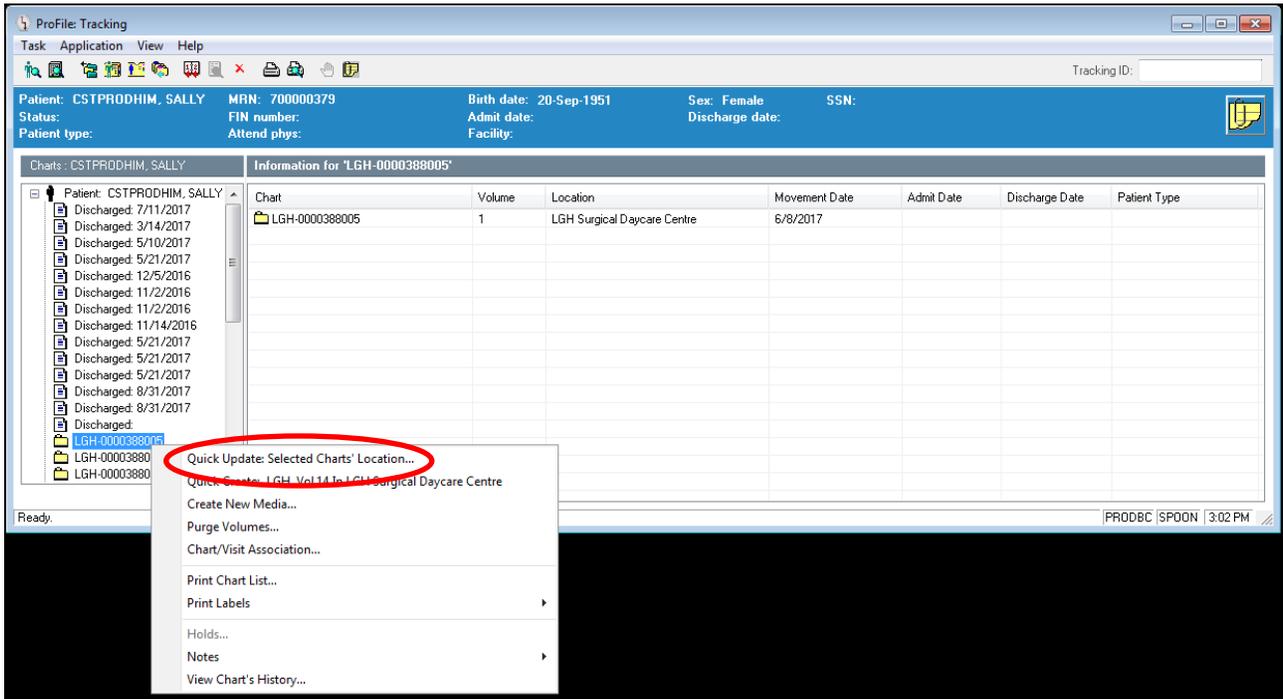


Note: “All Patient’s Charts...” will print labels for all charts associated to the patient for all sites.

Activity 2.7 – Update a Charts Location

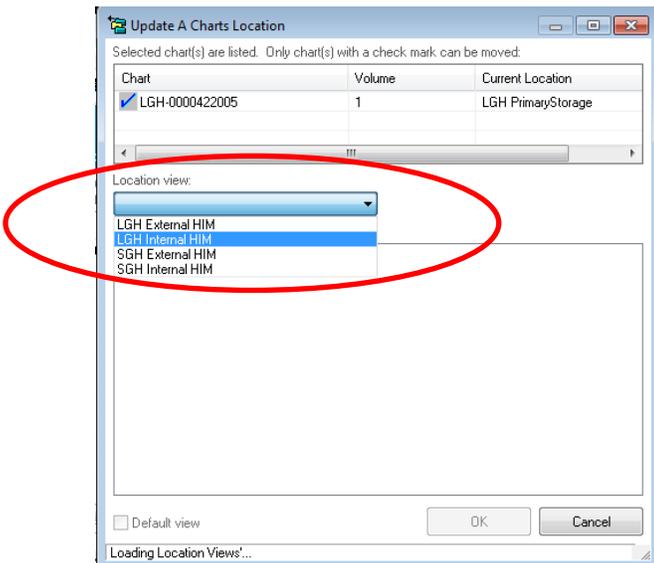
- 1 To update a charts location...
 - o Right-click on the patients chart volume

- Select **Quick Update: Selected Charts Location...** from the drop-down menu



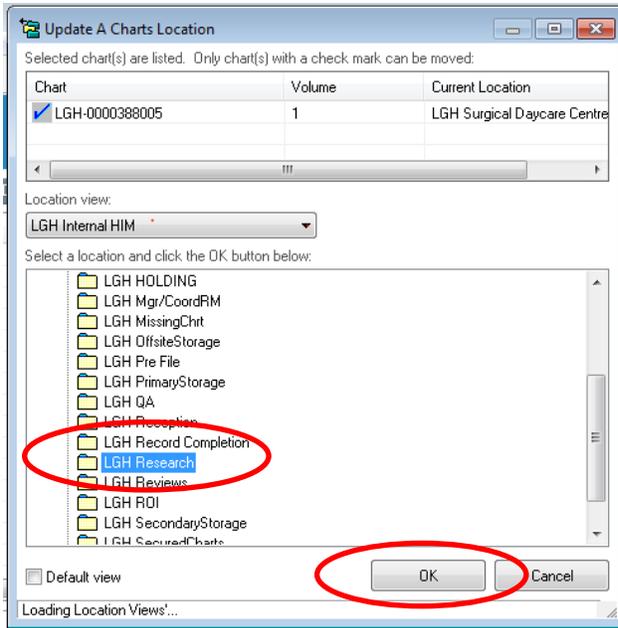
- 2 Select a new location for the chart.

In the Location View field, click the down arrow and select the appropriate facility location from the list.

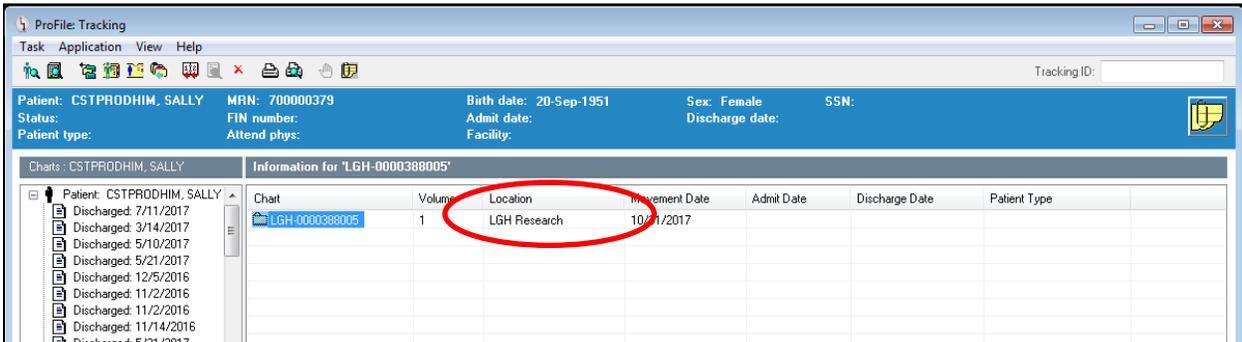


- 3 In the lower pane, scroll through the list and select the appropriate location.

Click **OK**.

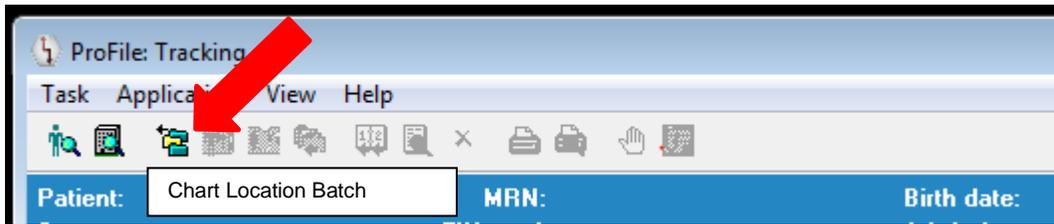


4 The Profile Tracking will now be updated to show the current location of the chart.

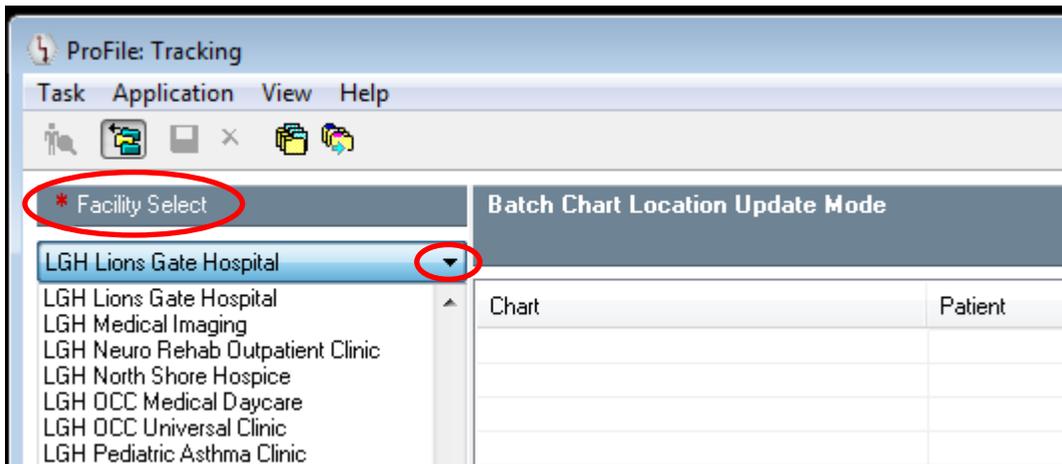


Activity 2.8 – Move Charts in Batches

1 Click on **Chart Location Batch Update**

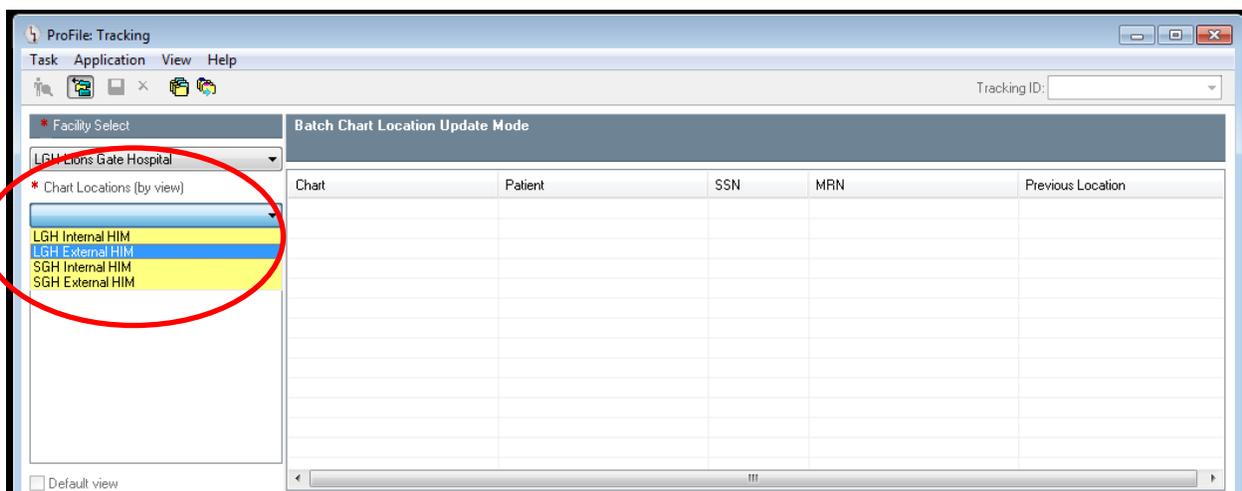


- Under Facility Select, click on the drop-down arrow to select a facility.



Note: Do not use the “Move all Volume” icon , as it moves all volumes.

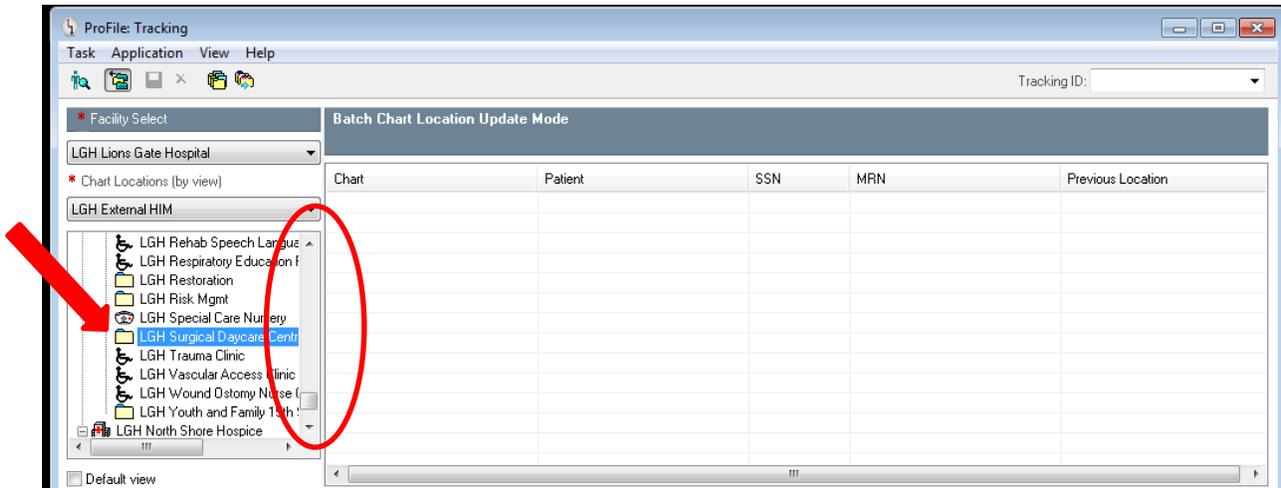
- Under Chart Locations (by view), click on the drop-down arrow to select a location (Internal / External HIM). Click on the desired location.



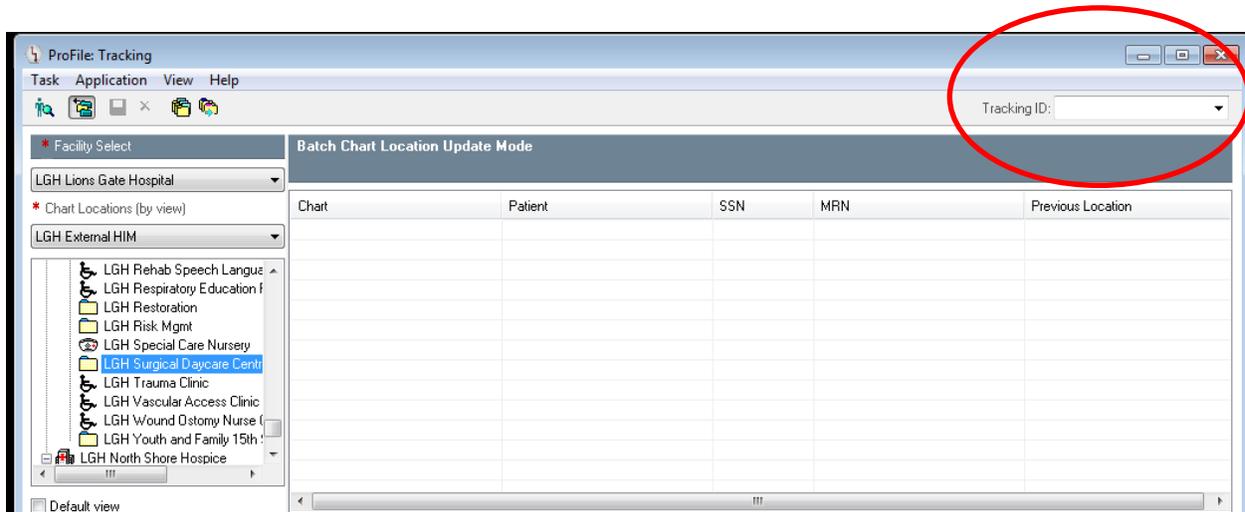
- Using the scroll bar, find the specific location to move the batch of charts to and click on that location.

It is important to note that if you just use your mouse to scroll up and down, you will change the Chart Locations (by view). If you prefer to use your mouse to scroll up and down within the Chart Locations area, you must click into the space.

Locations are listed under the facility (hospital, clinic, building) in alphabetical order.

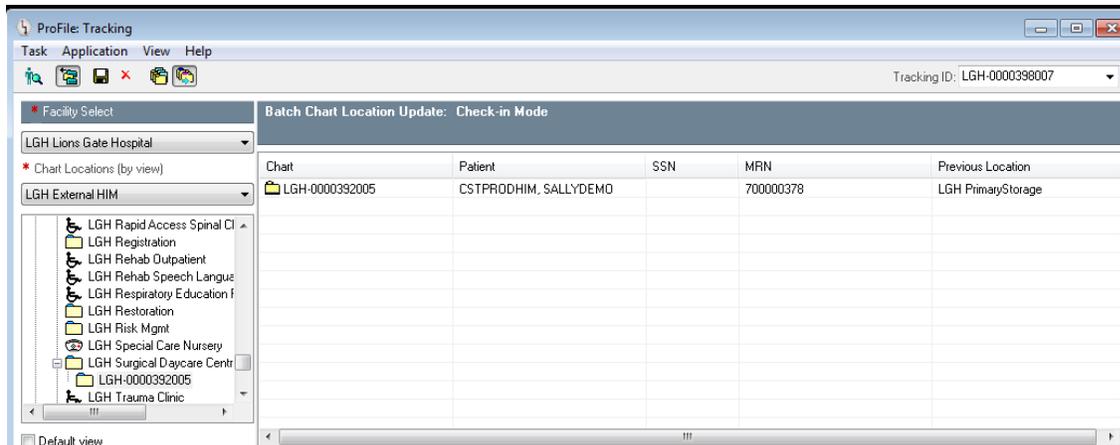


5 Click in the Tracking ID box.

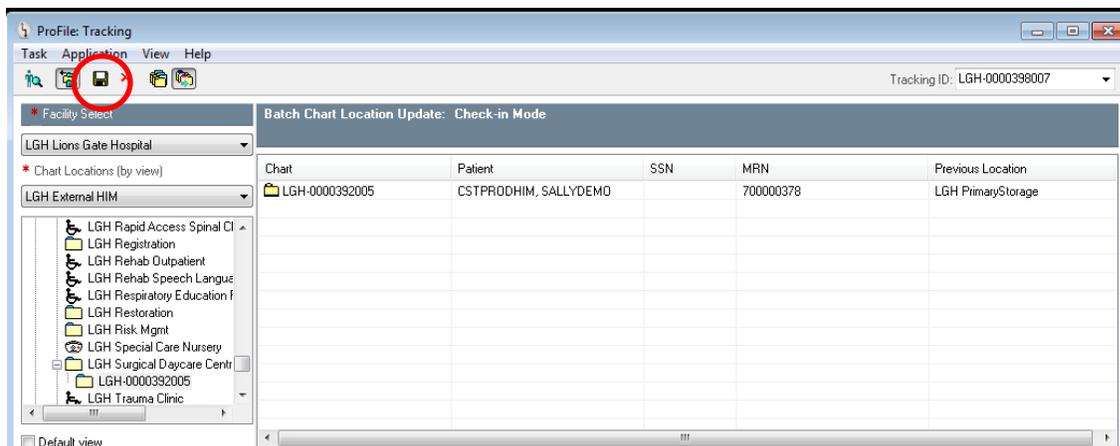


6 Scan the barcode on all the charts to be moved to the selected location. The charts should appear on the screen.

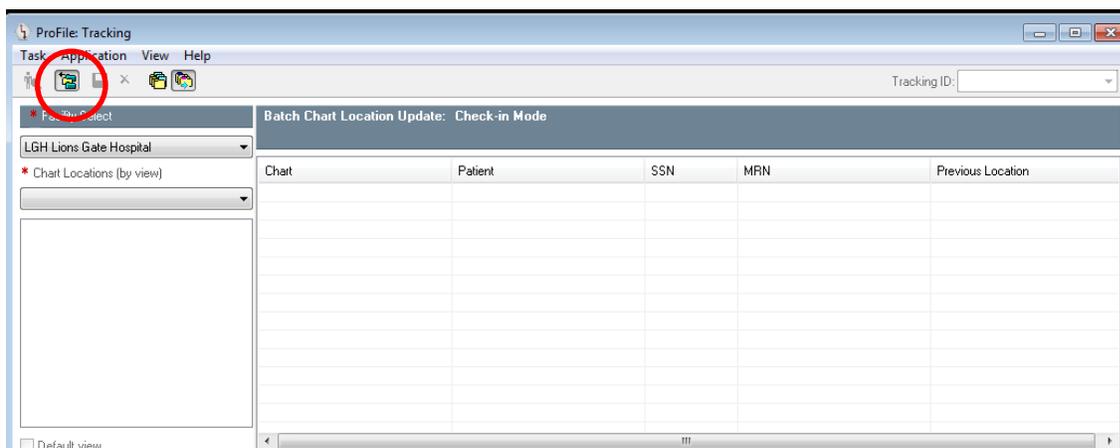




7 Click **Save**.



8 To get out of the Batch Update Mode and return to the main Chart Tracking window, click on the **Chart Location Batch Update Mode** icon.



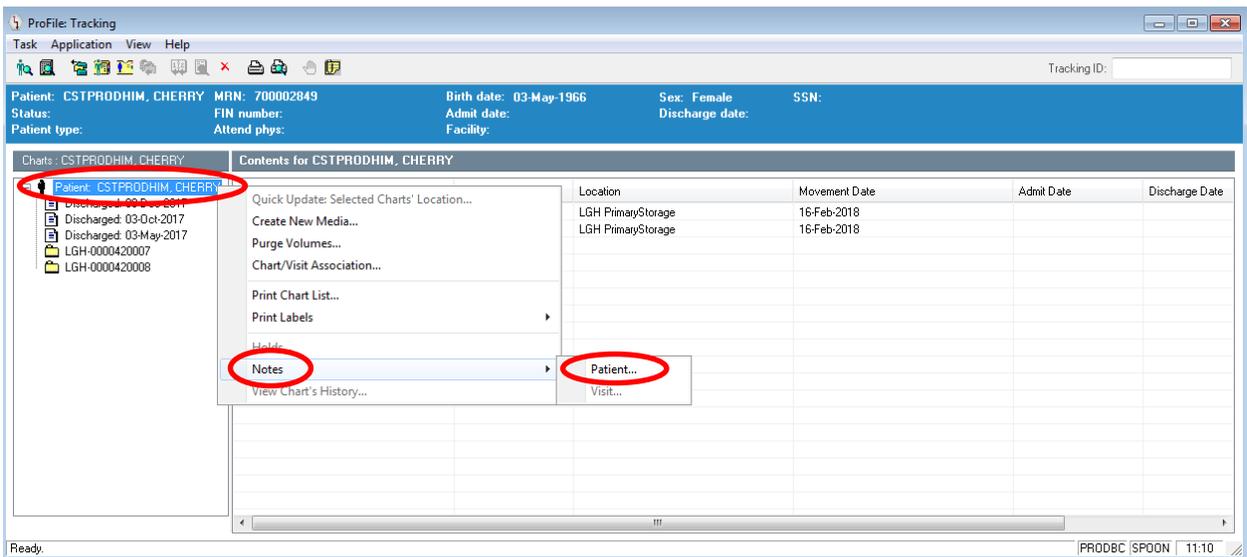
Activity 2.9 – Add / View / Delete Notes



Note: Notes are associated to the patient level and not to the volume. When documenting a note the user should reference the volume number if applicable.

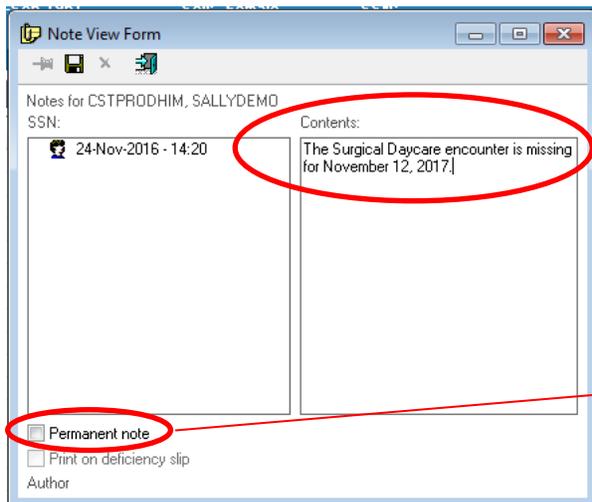
To Add a Patient Note

- 1 In the main Chart Tracking screen, with the patient displayed, right-click on the patient, then select the **Notes** option and choose **Patient**.



- 2 The **Note View Form** window will pop-up on your screen with the cursor display in the **Contents** field.

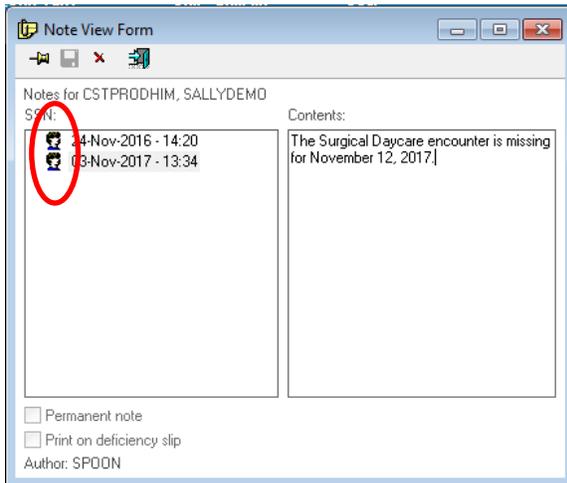
Type your note in the **Contents** field.



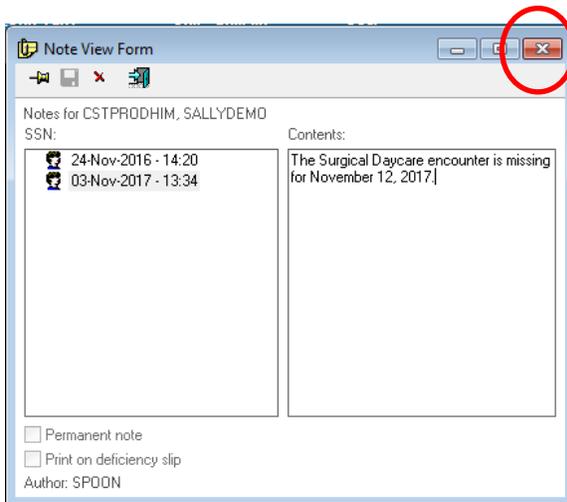
Permanent note: If selected, it does not really make the note "permanent". It will just prompt any future users when they try to delete the note, whether or not they really want to delete it.

- 3 When completed, click on the **Save New Note** icon .

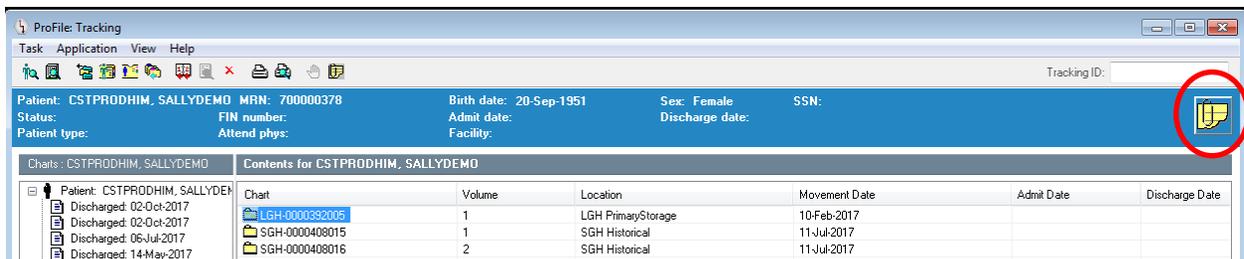
On the left-hand side of the screen, the date and time of the saved message will appear with the persons head.



- 4 When you are done entering the note for that patient, click on the gray and black X in the top right-hand corner of the **Note View Form** window.



- 5 The **Note View Form** window will close and a note icon will appear in the patients demographic banner bar on the right-hand side on the main Chart Tracking window.

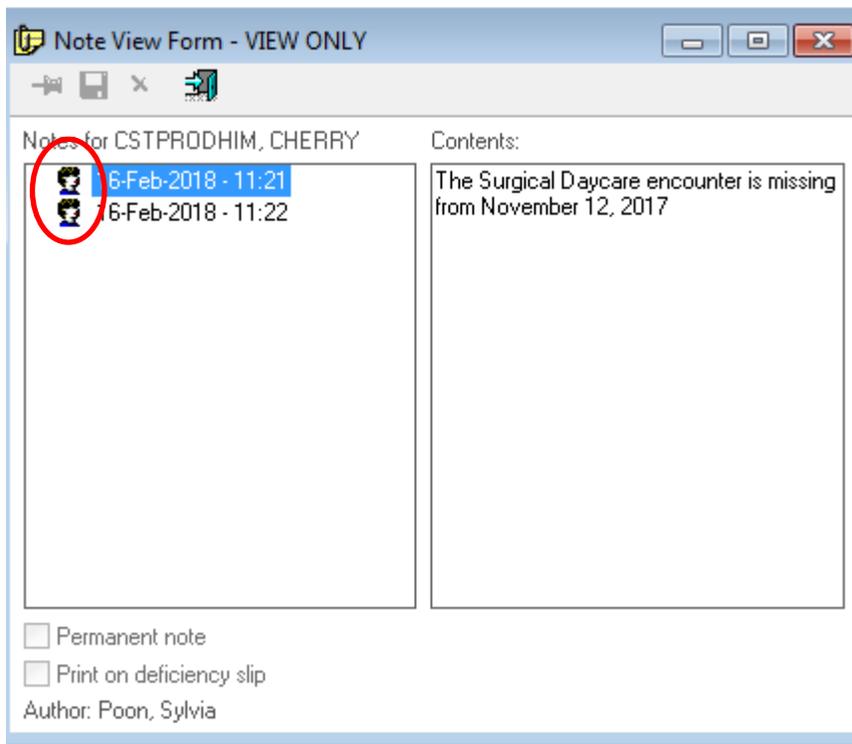


To View a Patient Note

1 In the main Chart Tracking screen, with the patient displayed, click on the note icon (yellow paper with a paper clip)  on the right-hand side of the patient demographics banner bar.

2 The **Note View Form** window will appear. Click on the note you want to display.

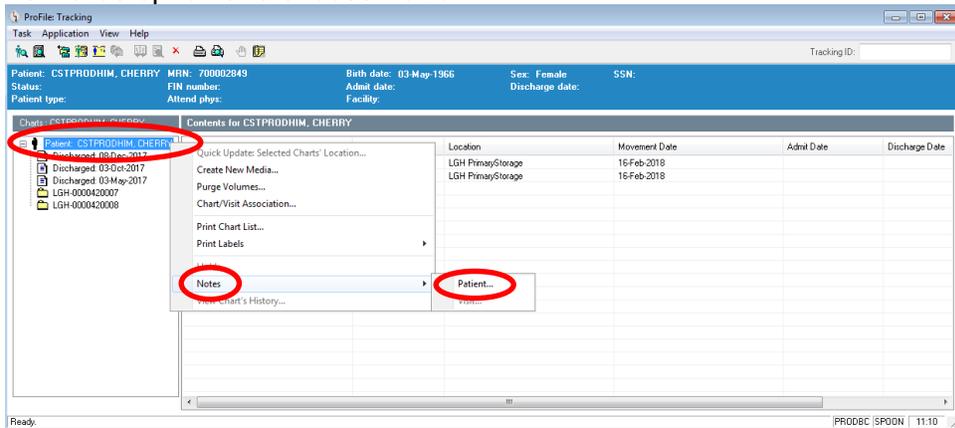
- Person's head is a patient note .



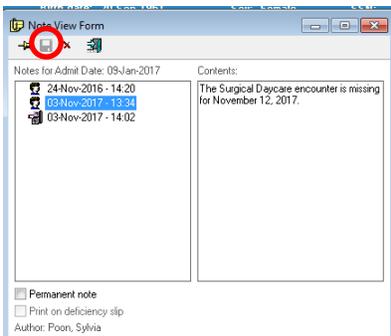
3 When done, click on the gray and black **X** on the top right-hand corner of the **Note View Form** window. You will be taken back to the main Chart Tracking window.

To Remove an Existing Patient Note

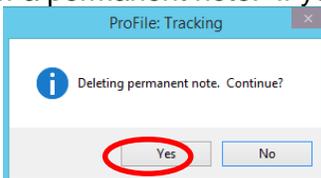
- 1 In the main Chart Tracking screen, with the patient displayed, right-click on the patient, then select the **Notes** option and choose **Patient**.



- 2 The **Note View Form** window will appear. Select the note you want to remove and then click on the red X icon  on the toolbar.



- 3 If the note had been marked as a **“Permanent note”**, you will be prompted to confirm the deletion of a permanent note. If you choose to do so, click **Yes**.



- 4 Once completed, click on the gray and black X on the top right-hand corner of the **Note View Form** window. You will be taken back to the main Chart Tracking window.

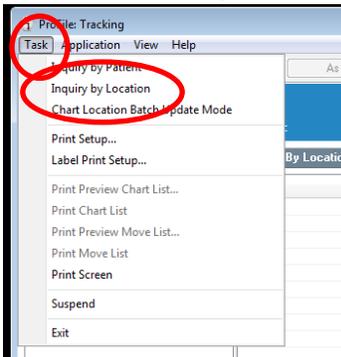


If you remove all of the associated patient, the note icon that displayed on the patient demographics banner bar will be removed.

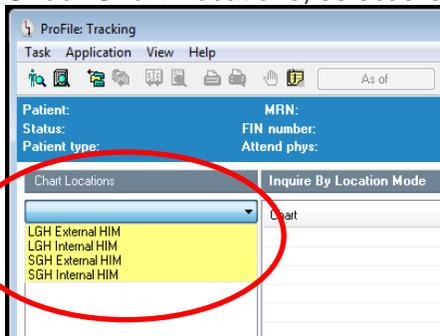
Activity 2.10 – Inquire by Location

1

If you want a listing of all of the charts that are in a specific location, in the main Chart Tracking window, go to the **Task** menu and select **Inquiry by Location**. The main Chart Tracking window display will change.

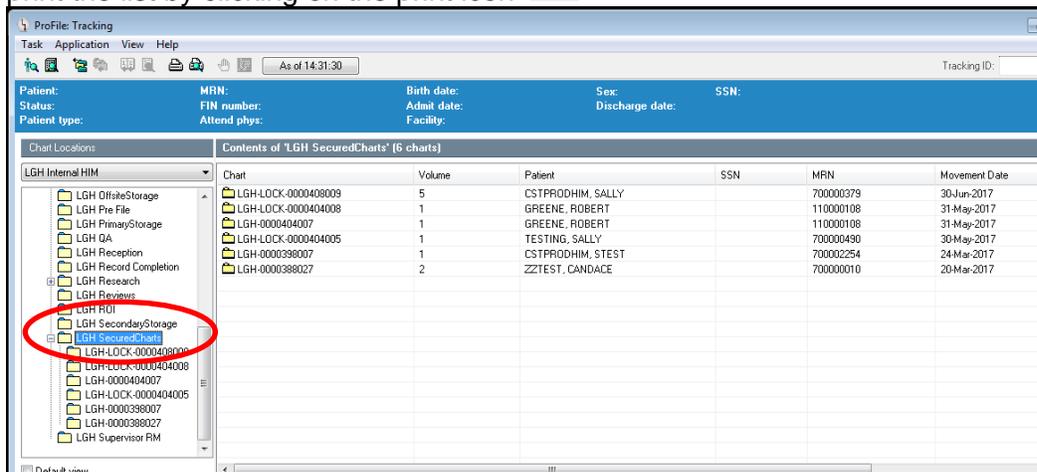


- Under **Chart Locations**, select the facility and whether it's an Internal HIM or External HIM location.



- Using the scroll bar under **Chart Locations**, click on the specific location you want a listing for. Note that if the location has a "+" sign to the left of it, you need to click it to expand the list of locations associated to that main location.

Once this is selected, double-click on specific location then a list of all the charts in this location will display underneath the location under **Charts Location** and on the right of the screen. You can print the list by clicking on the print icon 



ACTIVITY 3 – ProFile Patient Information Requests (PIR)

Learning Objectives

At the end of this activity, you will be able to:

- Create / Send a Patient Information Request
- Retrieve and Modify a Request

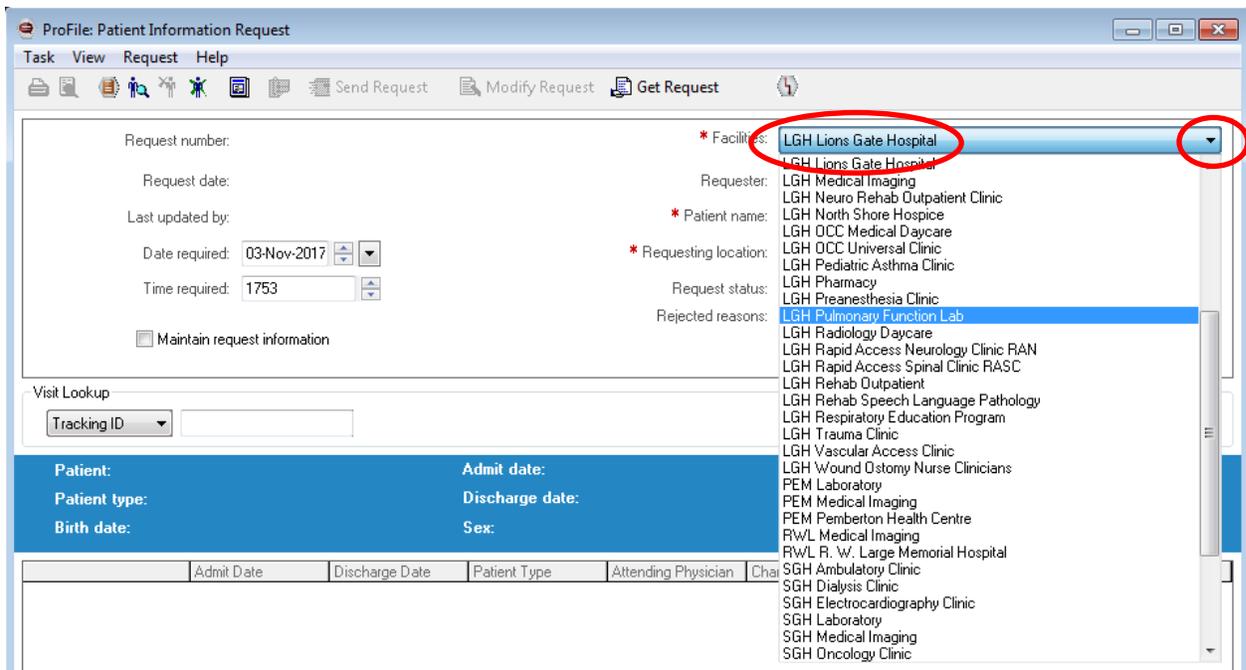
Activity 3.1 – Create / Send a Patient Information Request

1 Click the HIM Patient Information Request icon  from the Citrix StoreFront.

2 The **Profile: Patient information Request** window will appear.

Note that the fields marked with a red asterisks * are mandatory fields.

In the **Facilities** field, ALWAYS select the main facility from the drop-down list (i.e. LGH or SGH).



ProFile: Patient Information Request

Task View Request Help

Send Request Modify Request Get Request

Request number: * Facilities: LGH Lions Gate Hospital

Request date: Requester: LGH Lions Gate Hospital

Last updated by: Requester: LGH Medical Imaging

Date required: 03-Nov-2017 * Patient name: LGH Neuro Rehab Outpatient Clinic

Time required: 1753 * Requesting location: LGH North Shore Hospice

Maintain request information Request status: LGH OCC Medical Daycare

Visit Lookup Rejected reasons: LGH OCC Universal Clinic

Tracking ID LGH Pediatric Asthma Clinic

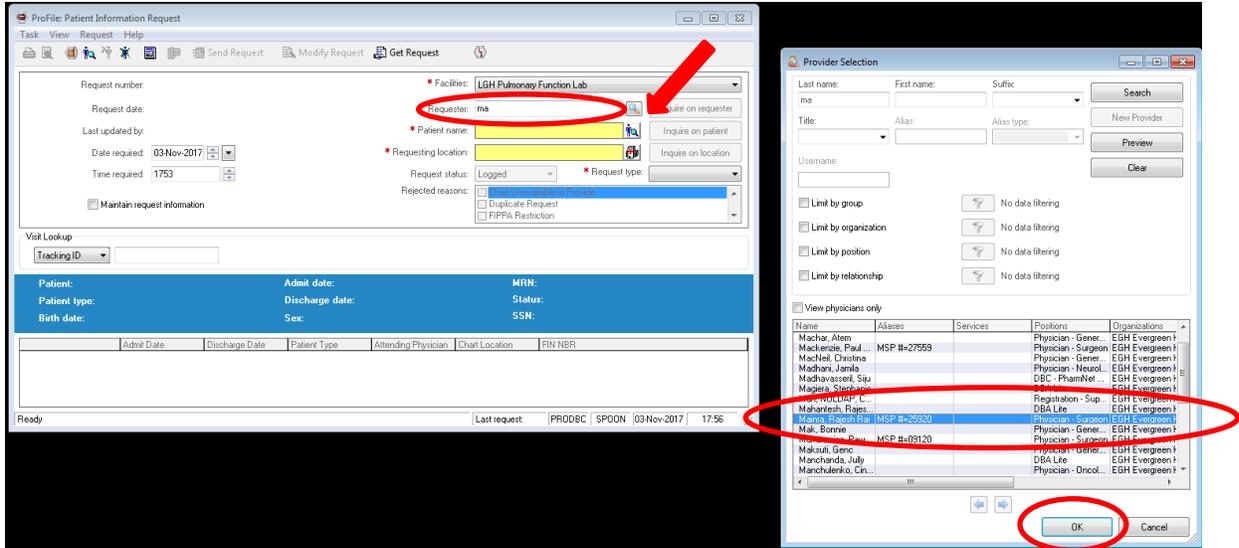
Patient: Admit date: LGH Pharmacy

Patient type: Discharge date: LGH Preanesthesia Clinic

Birth date: Sex: LGH Pulmonary Function Lab

Admit Date	Discharge Date	Patient Type	Attending Physician	Cha

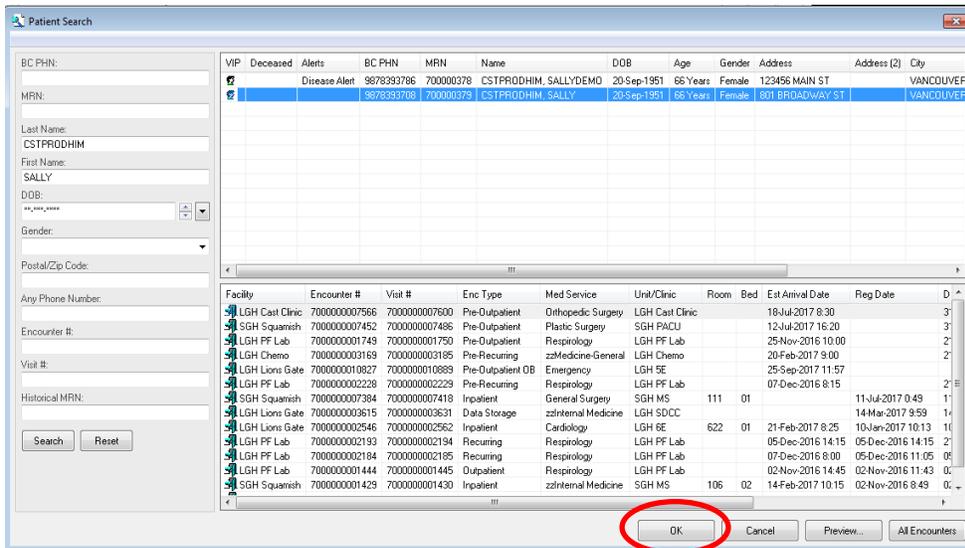
- 3 In the **Requester** field, type the requester's name (last name, first name), then click the **Search** button . The Provider Selection window will pop-up. When you find the correct requester name, click on it to select it and click **OK**.



Note: The Requester field may autopopulate if you have used this name in the past.

- 4 In the **Patient name** field, type the patient's name (last name, first name), then click the **Patient Search** button . The Patient Search window will pop-up, select the appropriate patient and then click **OK**.

Note: The system is designed to only allow one patient per request.



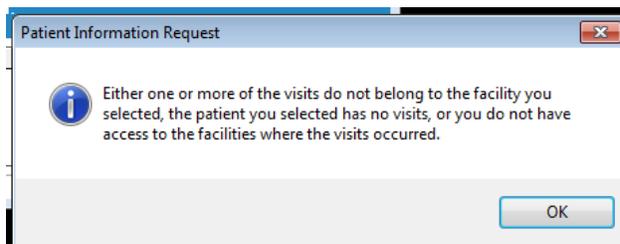
Note: If you have the chart with a Cerner barcode label, you can scan the barcode in the Visit Lookup field under Tracking ID to identify the patient.

The patient's record will display at the bottom.

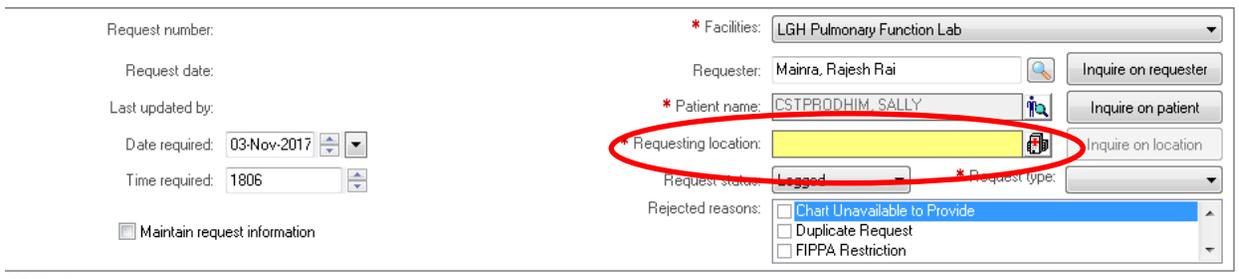
Admit Date	Discharge Date	Patient Type	Attending Physician	Chart Location	FIN NBR
	21-May-2017	Pre-Recurring			7000000002228
	21-May-2017	Pre-Outpatient			7000000001749
02-Nov-2016	02-Nov-2016	Outpatient			7000000001444
05-Dec-2016	05-Dec-2016	Outpatient			7000000003104

If the patient was seen at more than one facility (i.e. LGH and SGH), you will get this warning pop-up.

Click **OK** to bypass.



5 In the **Requesting location** field, click the Requesting Location button 



Request number: _____

Request date: _____

Last updated by: _____

Date required: 03-Nov-2017

Time required: 1806

Maintain request information

* Facilities: LGH Pulmonary Function Lab

Requester: Mainra, Rajesh Rai

* Patient name: CSTPRODHIM, SALLY

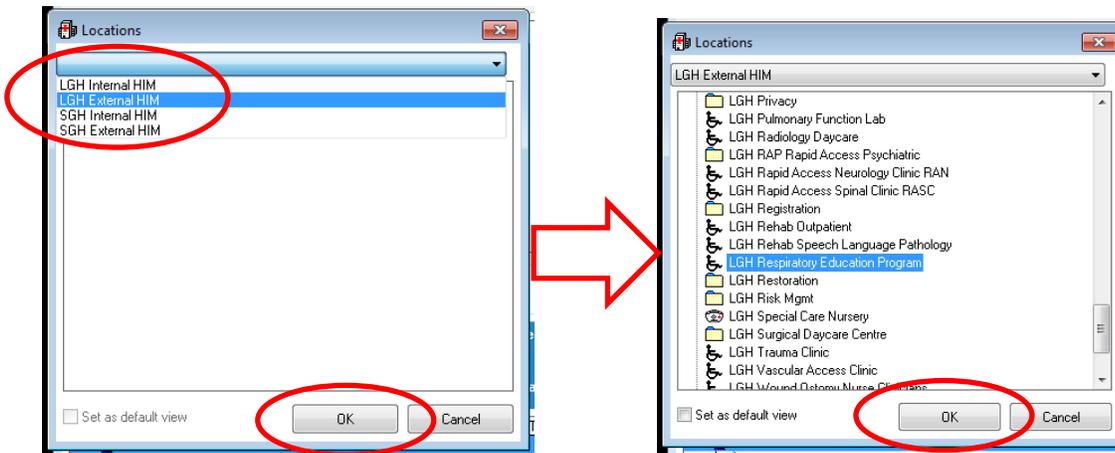
* Requesting location: _____

Request status: Logged

* Request type: _____

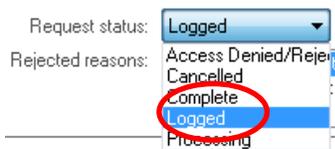
Rejected reasons: Chart Unavailable to Provide
 Duplicate Request
 FIPPA Restriction

6 The **Location** window will pop-up, click the appropriate location, and click **OK**.



Note: To save this location as your default, select the Set as default view option.

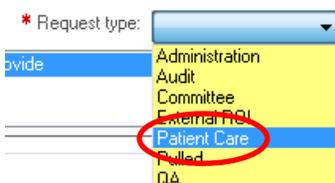
7 In the *Request status:* field, select the appropriate request status (i.e. **Logged**) from the drop-down box.



Request status: Logged

Rejected reasons: Access Denied/Rejected
 Cancelled
 Complete
 Logged
 Processing

8 In the *Request type:* field, select the appropriate request type (i.e. **Patient Care**) from the drop-down box.

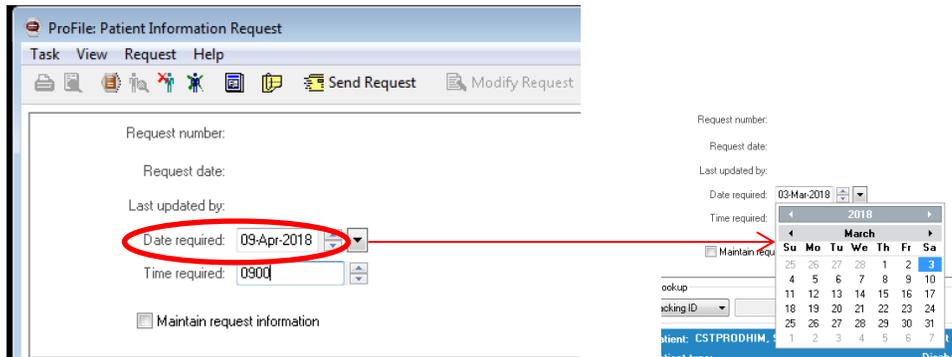


* Request type: _____

Administration
 Audit
 Committee
 External Ref
 Patient Care
 Pulled
 QA

9 Enter the date/time the chart(s) are required.

Note: To view a calendar, select the drop-down arrow button next to the date.



Notes: If you are entering multiple requests, you can check the Maintain Request Information box, which will hold the requesting location and requester for you.

The patient in the Request pop-up could appear if the patient has a prior request.

HIM will assume the user is only requesting the most recent volume unless the user specifies the volume or specific details.

10

Click the **Send Request** toolbar button

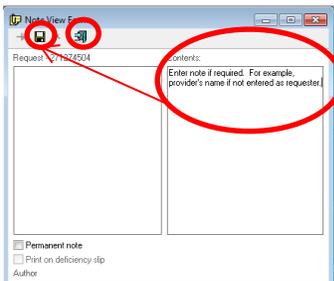


11

The **Note View Form** window will pop-up, enter a note if required and click the **Save** button

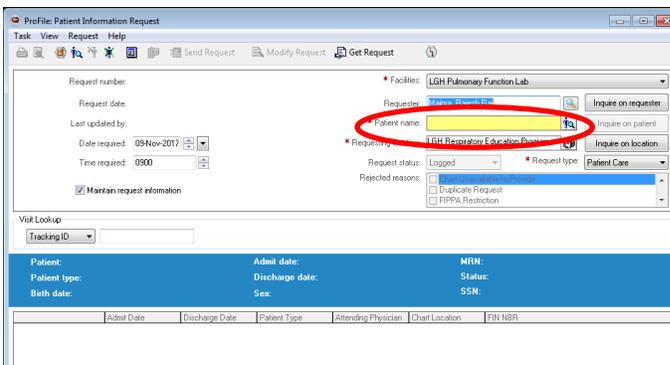


If no note is required, click the **Exit** button



12

You can continue to request more patient charts (batch request) by using the maintain request information check box and populating the **Patient name** field and clicking the **Send Request** button until all the requested charts by the same location and requester are completed.

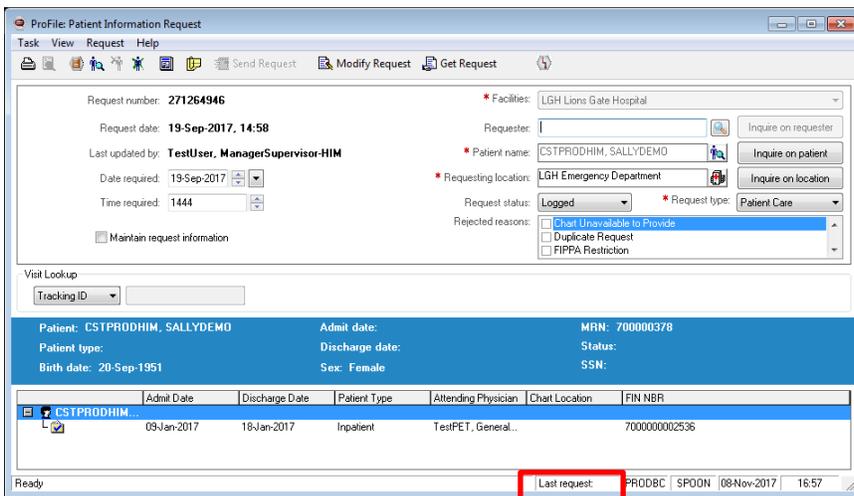


Activity 3.2 – Retrieve and Modify a Request

In order for you to retrieve and modify a request, you need to have the Request Number. You will note that when you enter a request, the Request Number can be found either on the Note View Form.



Of note, the last Request Number you entered can be found on the bottom of the screen.



Last Request: 271561786	TRAIN1	SPOON	16-Mar-2018	16:47
-------------------------	--------	-------	-------------	-------

Note: You can search for the Request Number by using either the Patient name or the Requesting Location.

Search for Request Number by Patient Name

- 1 In the PIR Request window, click in the **Patient name** field and search for the patient by clicking on the search button.

* Facilities: LGH Lions Gate Hospital

Requester: [] Inquire on requester

* Patient name: [] Inquire on patient

* Requesting location: [] Inquire on location

Request status: Logged * Request type: []

Rejected reasons: Chart Unavailable to Provide
 Duplicate Request
 FIPPA Restriction

- 2 Once the correct patient is selected, click on the **Inquire on patient** button.

* Facilities: LGH Lions Gate Hospital

Requester: [] Inquire on requester

* Patient name: HIM-PatientOne, Stephen Inquire on patient

* Requesting location: [] Inquire on location

Request status: Logged * Request type: []

Rejected reasons: Chart Unavailable to Provide
 Duplicate Request
 FIPPA Restriction

- 3 All requests for the patient will be listed. By clicking on the expander button next to the Request Number, you will see the details of each request. Write down the Requester Number.

Request date: 16-Mar-2018 16:46
 Required date: 16-Mar-2018
 Required time: 9:00
 Days overdue: 0

Rejected reasons: Chart Unavailable to Provide
 Duplicate Request
 FIPPA Restriction
 Invalid Authorization
 Other - Note

Request	Request Type	Hold	Note	Requester	Requested By	Loc
271529869	Patient Care				Poon, Sylvia	LGH
<input type="checkbox"/> HIM-PatientOne, Stephen 11-Jan-2018	760000925	1977-Jan-22	Male	41 Years	SSN:	
<input type="checkbox"/> 271561786 <input type="checkbox"/> HIM-PatientOne, Stephen 11-Jan-2018	Patient Care	Inpatient	Train, GeneralMedi...	7600000000925	Poon, Sylvia	LGH
	760000925	1977-Jan-22	Male	41 Years	SSN:	
	20-Jan-2018	Inpatient	Train, GeneralMedi...	7600000000925		

Ready Request: 271561786, Patients: 1 Total request: 2 of 2, Patients: 2 TRAIN1 SPOON 16-Mar-2018 17:11

Search for Request Number by Requesting Location

- 1 In the PIR Request window, click in the **Requesting location** field and search for the location by clicking on the search button.

* Facilities: LGH Lions Gate Hospital

Requester: [] Inquire on requester

* Patient name: [] Inquire on patient

* Requesting location: [] Inquire on location

Request status: Logged * Request type: []

Rejected reasons: Chart Unavailable to Provide
 Duplicate Request
 FIPPA Restriction

- 2 Once the correct requesting location is selected, click on the **Inquire on location** button.

* Facilities: LGH Lions Gate Hospital

Requester: [] Inquire on requester

* Patient name: [] Inquire on patient

* Requesting location: LGH 6 East Inquire on location

Request status: Logged * Request type: []

Rejected reasons: Chart Unavailable to Provide
 Duplicate Request
 FIPPA Restriction

- 3 All requests for the patient will be listed. By clicking on the expander button next to the Request Number, you will see the details of each request. Write down the Requester Number.

Request date: 16-Mar-2018 16:46
 Requested date: 16-Mar-2018
 Required time: 9:00
 Days overdue: 0

Rejected reasons: Chart Unavailable to Provide
 Duplicate Request
 FIPPA Restriction
 Invalid Authorization
 Other - Note

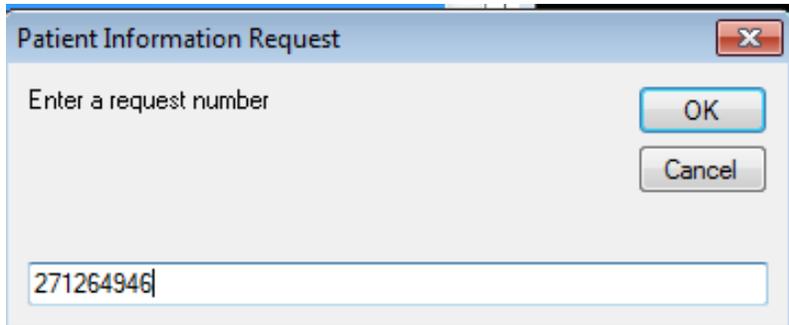
Request	Request Type	Hold	Note	Requester	Requested By	Loc
271529869	Patient Care					
HIM-PatientOne, Stephen	760000925	1977-Jan-22	Male	41 Years	Poon, Sylvia	LGH
11-Jan-2018	20Jan:2018	Inpatient	Train, GeneralMedi...	7600000000925	SSN:	
271561786	Patient Care					
HIM-PatientOne, Stephen	760000925	1977-Jan-22	Male	41 Years	Poon, Sylvia	LGH
11-Jan-2018	20Jan:2018	Inpatient	Train, GeneralMedi...	7600000000925	SSN:	

Ready Request: 271561786, Patients: 1 | Total request: 2 of 2, Patients: 2 | TRAIN1 | SPOON | 16-Mar-2018 | 17:11

Once you have the Request Number, you can now retrieve and modify the request.

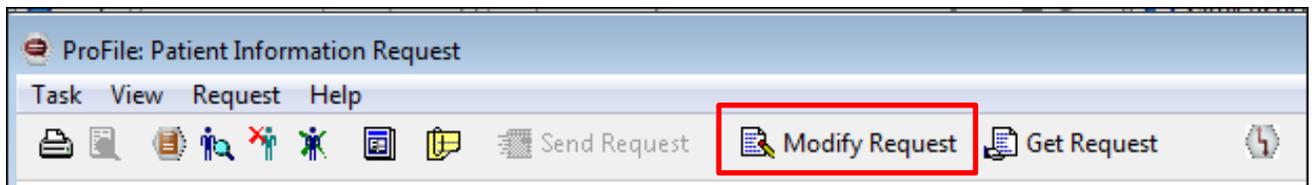
1 In the PIR Request window, click the **Get Request** button  on the toolbar.

2 Type the **request number**.



3 Make the necessary changes (i.e. Date required, Requester, Requesting location, Request status, Rejected reasons).

4 Click the **Modify Request**  toolbar button to save the changes.



5 The **Note View Form** opens, enter a note or click Exit .

ACTIVITY 4 – Reporting Using the Discern Reporting Portal

Activity 4.1 – Run / View HIM Reports

Learning Objectives

At the end of this Scenario, you will be able to:

- Run HIM reports.
- View / Print HIM reports.
- Export HIM reports to Excel.

1

In the Citrix StoreFront, click on the **Discern Reporting Portal** icon



2

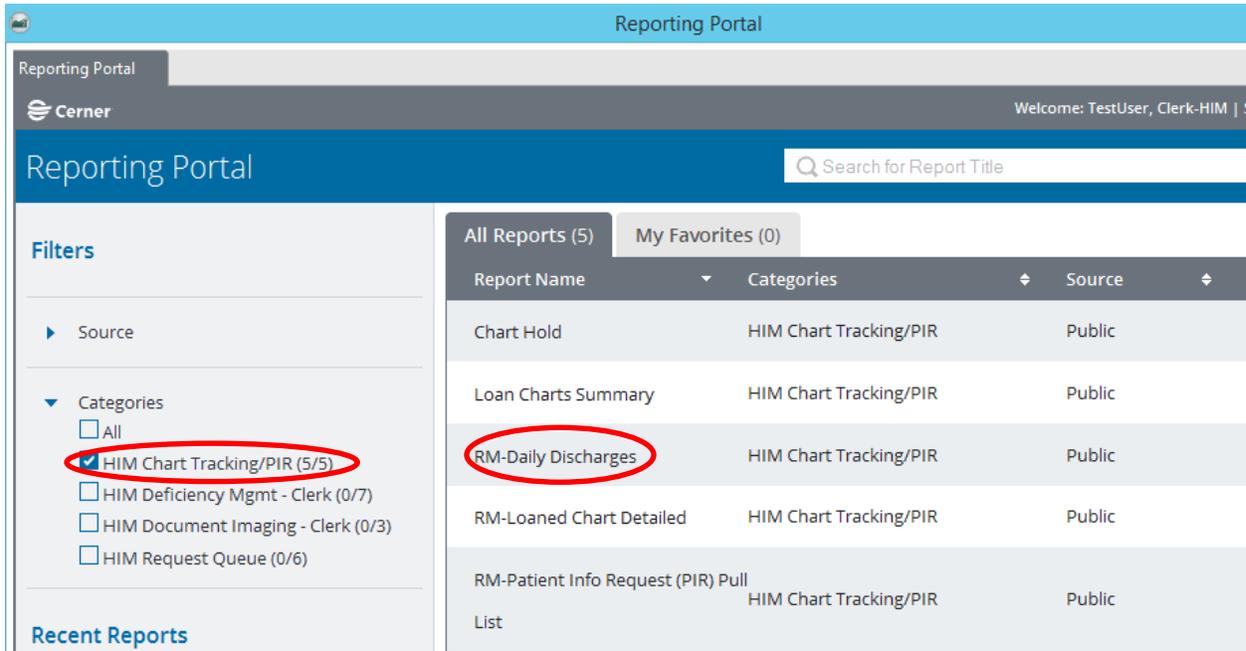
Today's example will show you how to run a daily discharge list for a hospital. Note that you will use the same process to run any report you have access to using the Discern Reporting Portal. The Reporting Portal window will pop-up and look similar to this.

The screenshot shows the Discern Reporting Portal interface. The top navigation bar includes the Cerner logo and a welcome message for Poon, Sylvia. A search bar is available for finding reports by title. The main content area displays a list of reports under the 'All Reports (59)' tab. The list includes columns for Report Name, Categories, Source, and Favorite status. A 'Filters' sidebar on the left allows for filtering by Source and Categories. A 'Recent Reports' section shows 'RM-Daily Discharges'.

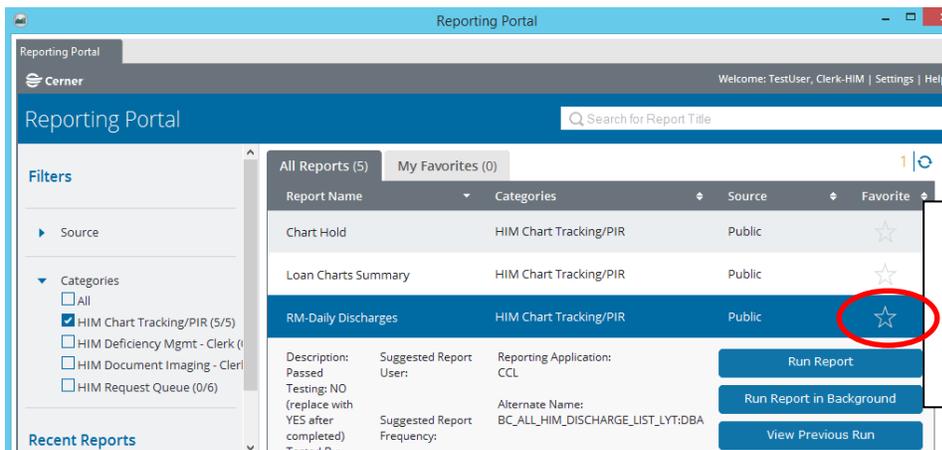
Report Name	Categories	Source	Favorite
Analysis Productivity Detail	HIM Productivity	Public	☆
Analysis Productivity Summary	HIM Productivity	Public	☆
Ascent Module Access	HIM Document Imaging - Mgr/Supervisor	Public	☆
Batch Details	HIM Document Imaging - Mgr/Supervisor	Public	☆
Batch List	HIM Document Imaging - Mgr/Supervisor	Public	☆
Chart Hold	HIM Chart Tracking/PIR	Public	☆
Chart Tracking Productivity	HIM Productivity	Public	☆
Cosign Orders - Inpatient	HIM Deficiency Mgmt	Public	☆
Daily Productivity	HIM Document Imaging - Mgr/Supervisor	Public	☆
Deficiency by Physician Detail (Cerner)	HIM Deficiency Mgmt	Public	☆

3 On the left-hand column, expand the arrow keys and you will see **Source** and **Categories**. These are the reports you have access to categorized by the Cerner modules.

On the right-hand column, you will have an alphabetical listing of the actual reports you can run. For today's exercise, we will choose RM-Daily Discharges. Click on **HIM Chart Tracking/PIR** and select **RM-Daily Discharges**.



4 Your screen will look similar to this.



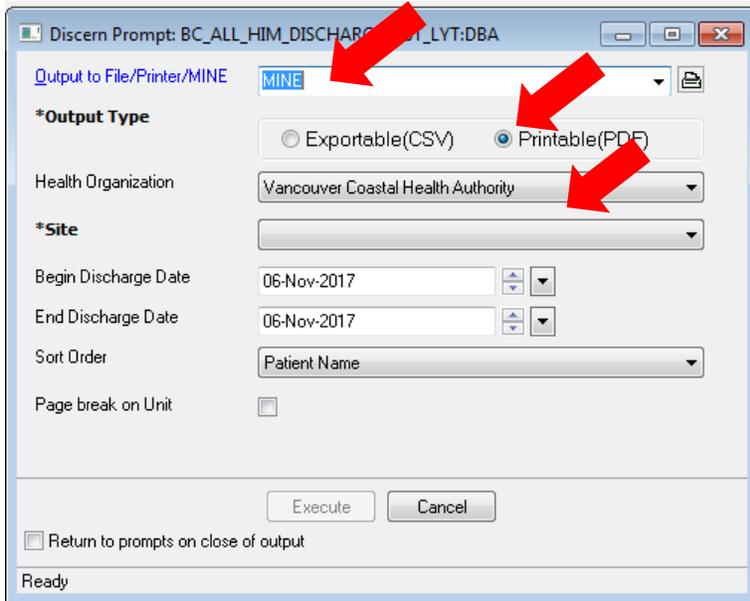
If you have reports that you run regularly, you can tag these as **Favorites** by clicking on the star at the far right of the report. 

5

Click on the **Run Report** button.



6 The following dialog box will appear on your screen.



7 In the **Output to File/Printer/MINE** field, the only option will be to use **MINE** or to click on the printer icon to send the report to a printer. **MINE** will run the report and display on your screen and this is what is recommended when running any reports to preview it first.

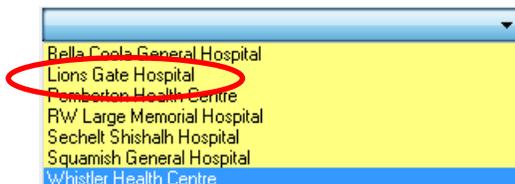
8 For the **Output Type**, you can choose **Exportable (CSV)** or **Printable (PDF)**, depending on whether you want to export the report to another format (i.e. Excel) or print a copy of the report.

- Exportable (CSV) is a comma separated value file that can be directed to an Excel spreadsheet, but you would need to know how to convert the information properly in Excel before it would be in a readable format.
- Printable (PDF) stands for Portable Document Format, which means that the Adobe software converts it into a readable format without any work on your behalf. You will want to use that choice if it not is already defaulted to the PDF radio button. Note that not all reports have a PDF output.

For the Daily Discharges, you will want to print this report. Click on the **Printable PDF** radio button.

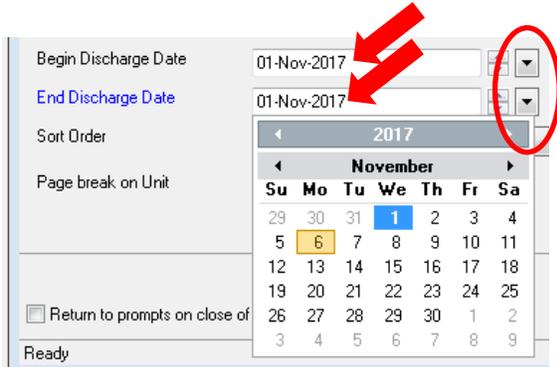
9 In the **Health Organization** field, the only option currently is **Vancouver Coastal Health Authority**. This field will display more than one health organization as CST expands to PHC and PHSA.

10 In the **Site** field, click on the drop-down arrow to display the sites available. Click on **Lions Gate Hospital**. The main hospital includes affiliated sites and all its units/clinics.



- 11 In the **Begin Discharge Date** and **End Discharge Date**, enter the dates of the discharges you wish to print. The date will be the same if you are looking to print one days worth of discharges. For the weekends discharges, you would enter a date range.

If you click on the drop-down arrow keys, you will get a calendar.



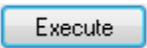
- 12 In the **Sort Order** field, you can sort the list by **Patient Name** or **Terminal Digit**. For the Daily Discharges, we want to sort by patient name.



- 13 For **Page break on Unit**, click the box **ONLY** if you plan on separating the printed list by unit/ward (i.e. if different staff collect the patient charts on the units/wards).



- 14 To run the report, click on the **Execute** button.



Here is a partial example of what you will see.

Published Desktop - ProdBC - Citrix Receiver

Reporting Portal

RM-Daily Discharges

RM-Daily Discharges Report

Submitted By: Poon, Sylvia
Submitted On: 06-NOV-2017 14:14

Site: Lions Gate Hospital
Date Range: 01-NOV-2017 To 01-NOV-2017

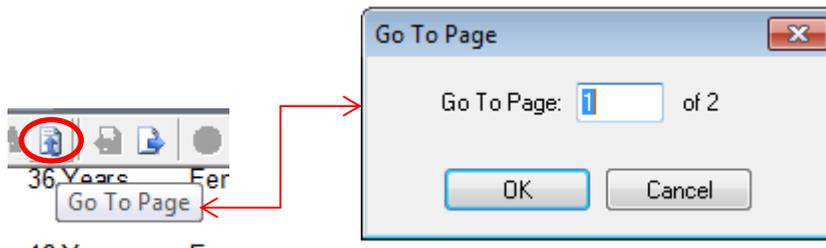
Patient Name	HMRN	MRN	Encounter#	Encounter Type	Admit Date/Time	Discharge Date/Time	Attending Physician	Length of Stay	Disposition
Unit LGH 2 East									
CSTSITHREEBBROWN, SITTWOMARY		700007796	7000000012887	Inpatient	31-OCT-2017 09:02	01-NOV-2017 09:08	Plisvca, Rocco, MD	1	Transferred to a Non Acute Care Facility
Unit LGH 3 West									
CSTMATTEST, AMY		700006044	7000000009172	Inpatient	18-AUG-2017 15:24	01-NOV-2017 09:57	Plisvcl, Antonio, MD	74	Discharged Home with Support Services
Unit LGH 4 East									
CSTPRODREG, JUSTINE		700002214	7000000012850	Inpatient	30-OCT-2017 09:39	01-NOV-2017 09:41	Plisvca, Rocco, MD	2	Discharged Home with Support Services

15 Using the toolbar, you can choose what you want to do. Your options include:

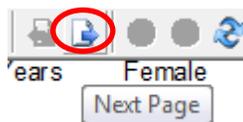


- Saving the report 
- Printing the report 
- Go to Page 
- Previous Page 
- Next Page 
- Zoom In/Out  150%
- Exit 

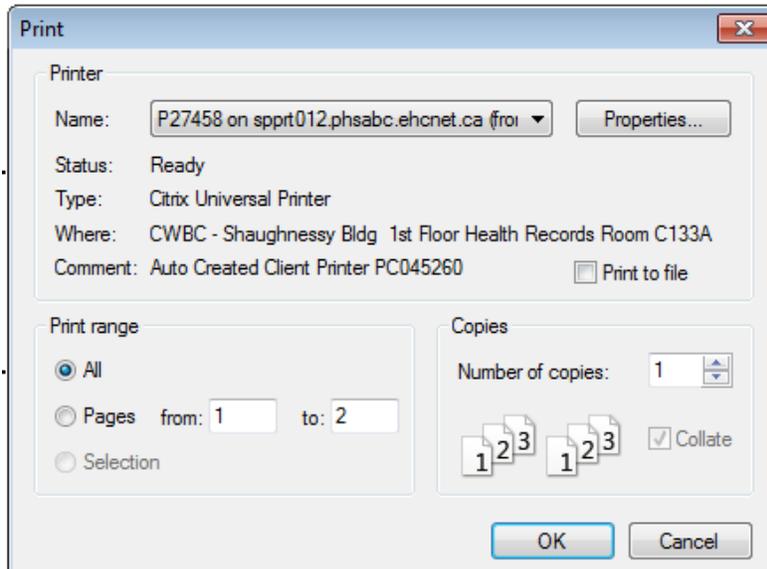
16 If you want to know how many pages are in a report, you can either scroll down to the bottom of the current page and look on the right-hand side to see Page X of Y, or you can click on the **Go To Page** icon  in the toolbar. A small dialog box appears where you can see how many pages are in the Daily Discharge report.



Click on the **Next Page** icon to advance the report one page at a time.



- 17 To print out the Daily discharge, click on the **Print** icon in the toolbar. 
The Print dialog box will pop-up. Click **OK**.



- 18 When you are done with the report, click the **Close** icon. 

- 19 Note, to close the Discern Reporting Portal, click the red close button (the bottom one, not the top one, as the top one will shut down the program).



ACTIVITY 5 – Navigating PowerChart (Patients Chart)

Activity 5.1 – Search and Review a Patients Chart

Learning Objectives

At the end of this Scenario, you will be able to:

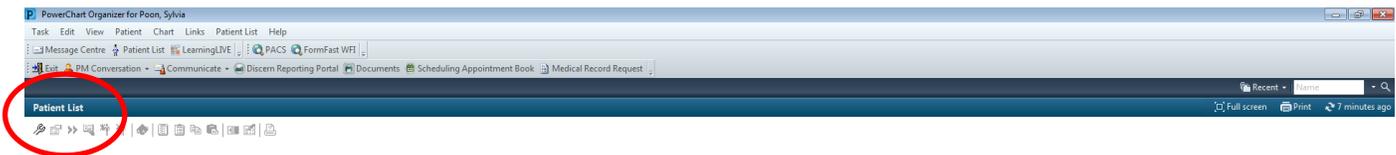
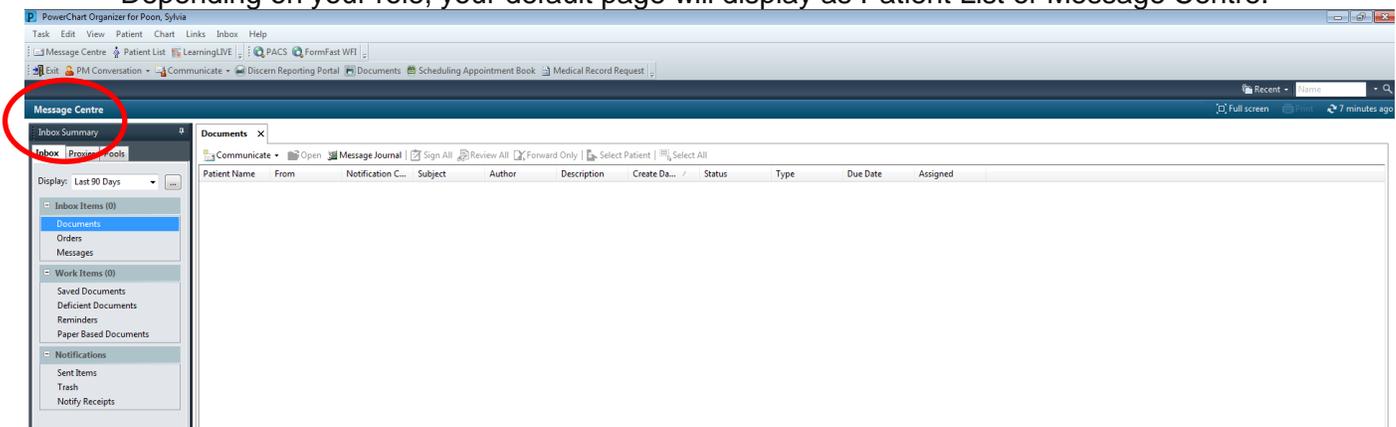
- Search for Patients Charts Using Various Search Parameters.
- Assign a Relationship to a Patients Chart.
- Review the Banner Bar.
- Understand the Results Statuses of Documents.
- View a Document.
- Use Filters to Search for Specific Documents
- View Results

1



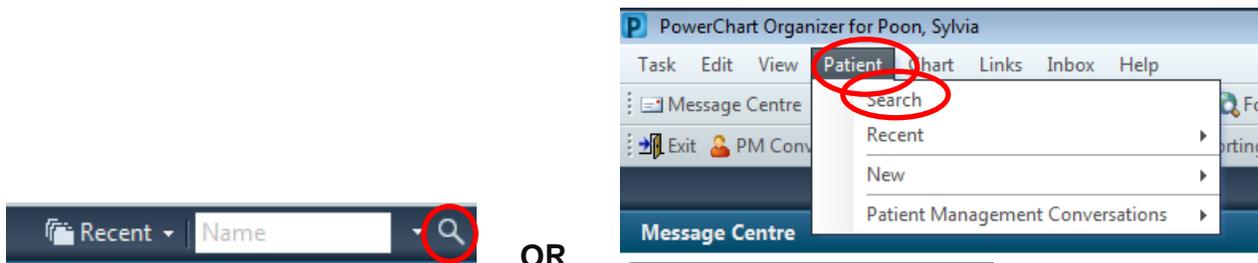
In the Citrix StoreFront, click on the **PowerChart** icon .

Depending on your role, your default page will display as Patient List or Message Centre.



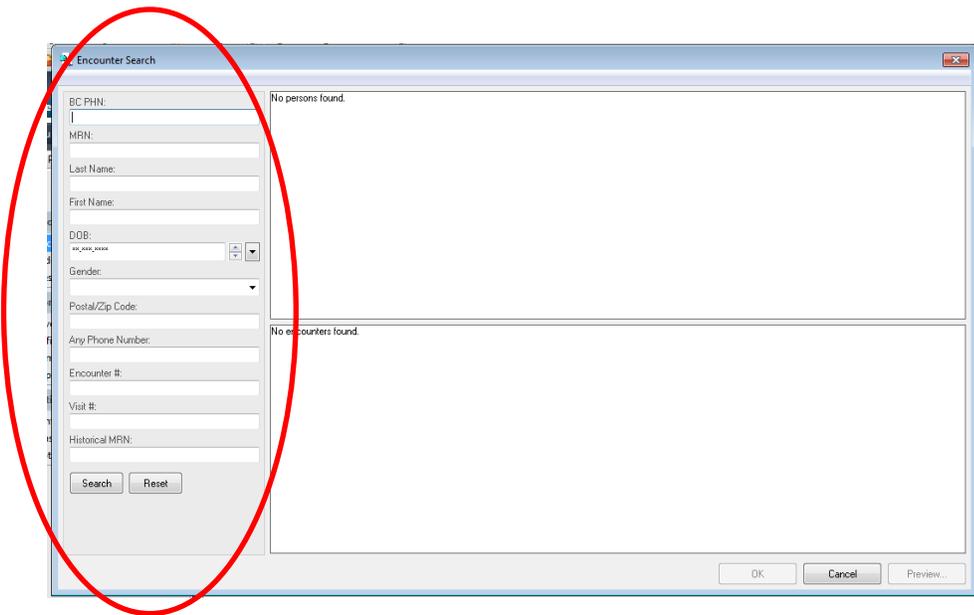
2

To search for a patients chart, you can click the **magnifying glass** icon (top right) to open the Patient Search window. You may also click on **Patient** in the toolbar and select **Search**.



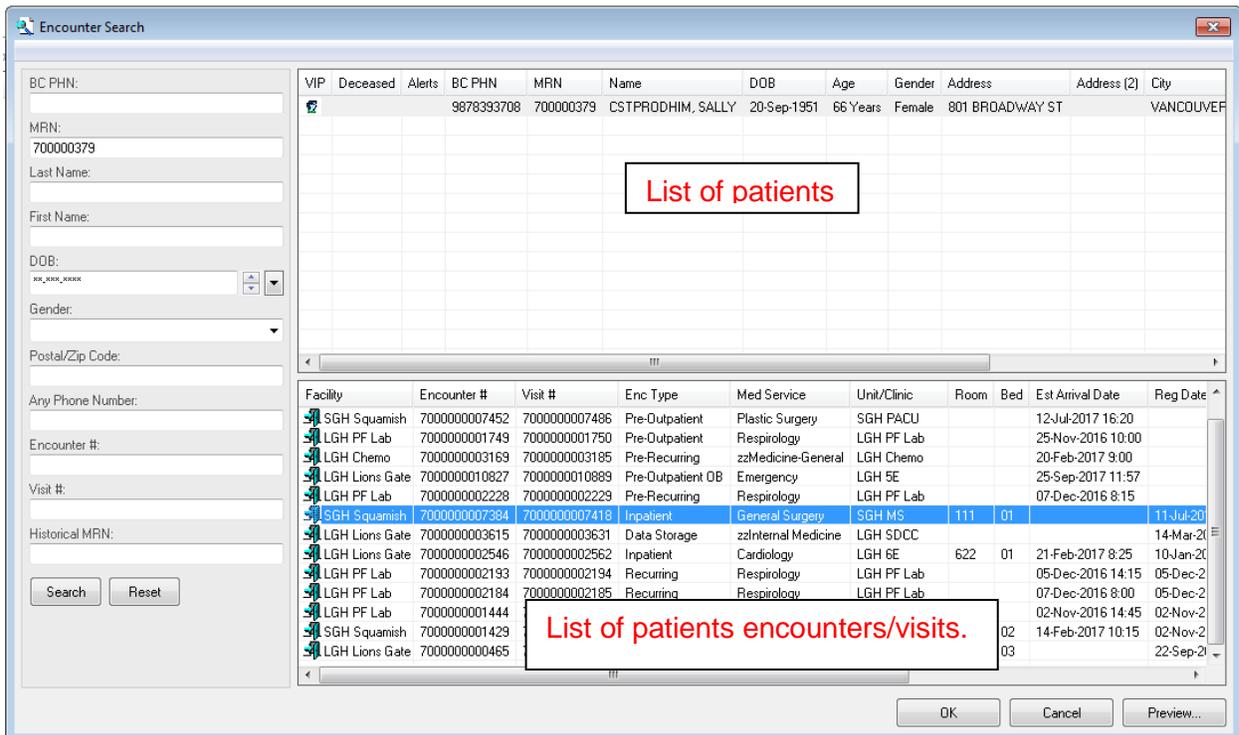
OR

- 3 The **Encounter Search** box will appear. You can search for your patient, using any of the search parameters displayed on the left (i.e. MRN, Last Name/First Name, Historical MRN).



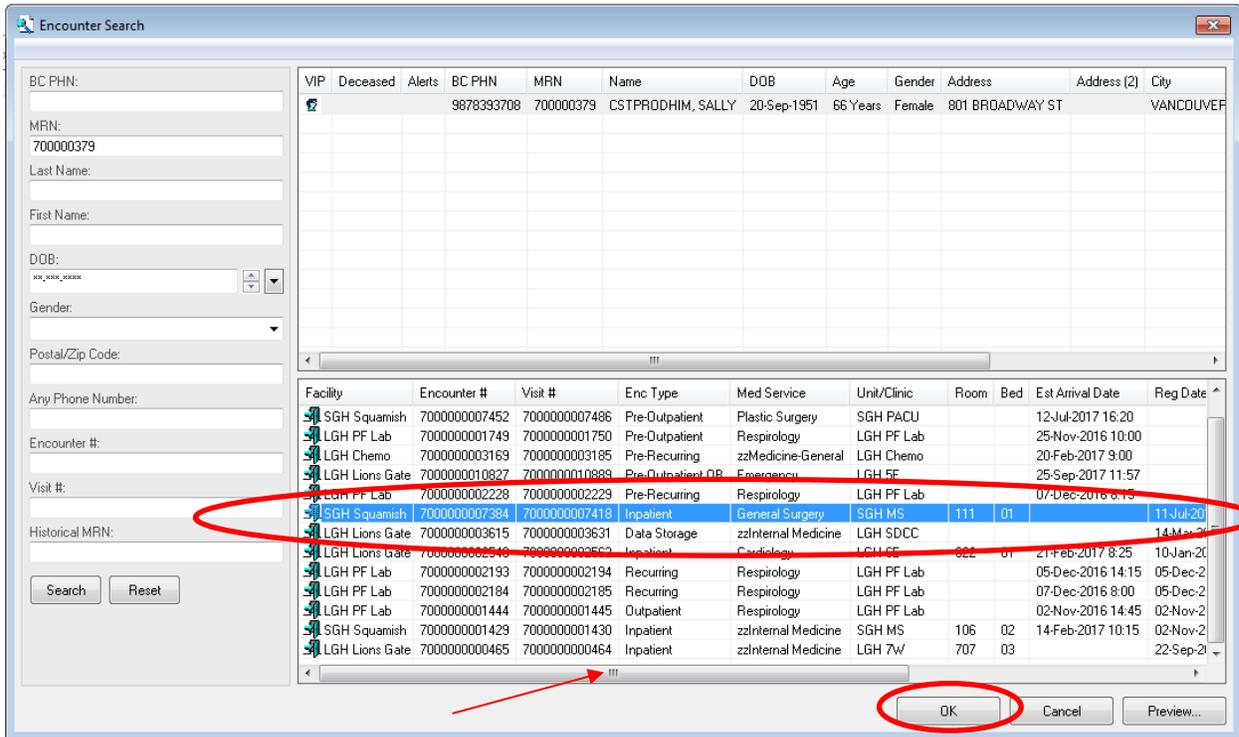
- 4 If you don't know the specific patient and you have to do a search, your screen will display all patients that may match your search parameters., You will have to click on the correct patient on the top box to select the right patient and have the corresponding encounters/visits to appear on the bottom box

If you know the specific patient, your screen will display the patient on the top box with the corresponding encounters/visits on the bottom box.



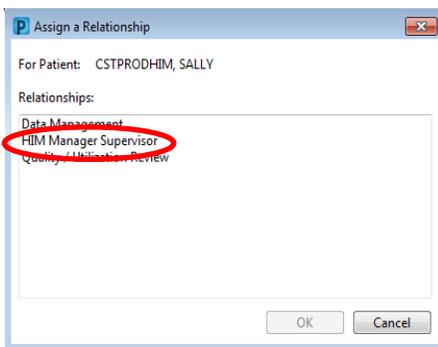
- Select the appropriate encounter/visit and click **OK**. It is important to select the correct encounter to review specific information regarding that visit (e.g. contact details may change with each encounter).

To view more encounter information, use the bottom scroll bar to expand the options.



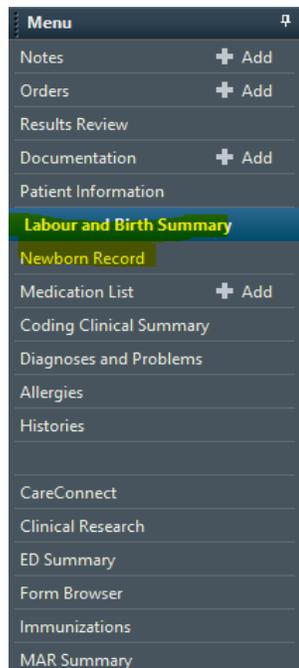
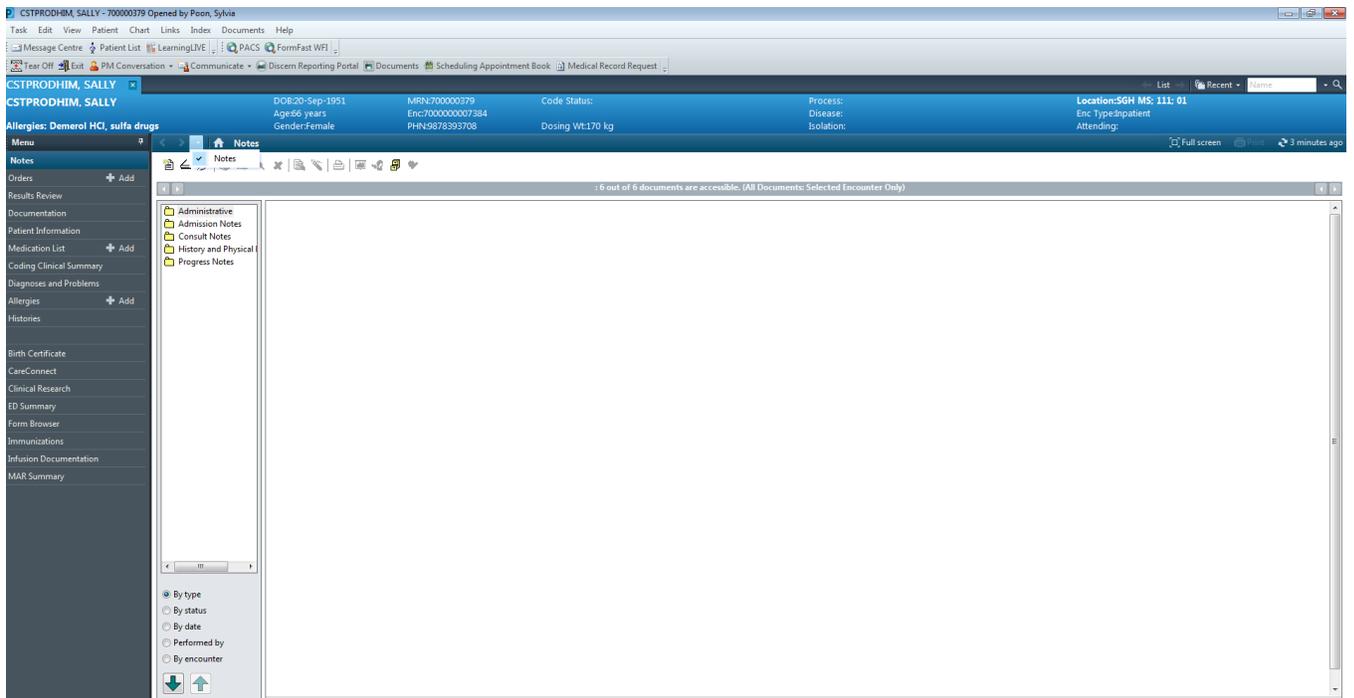
- You may be prompted to **Assign a Relationship**. Depending on your role, you will have a list of Relationships that you can use to associate with a patient in order to view their chart. You will need to re-assign a relationship for that patient after every 10 days.

Select your role (i.e. **HIM Manager Supervisor**) and click **OK**.



7

The patients chart will display and look similar to the below screenshot. If the patient already has encounters in the system, you will have access to patient information such as allergies, histories, past visits documents, etc.



Updated screenshot with addition of Labour and Birth Summary and Newborn Record

- 8 At the top of every screen of a patient’s record, there is a **Banner Bar** allowing for proper patient identification. It displays information specific to the patient – including demographical data, alerts, information about patient’s location, and current encounter.



You can have up to two patient charts opened at any given time. You will notice that the banner bar colors will be different for each patient.



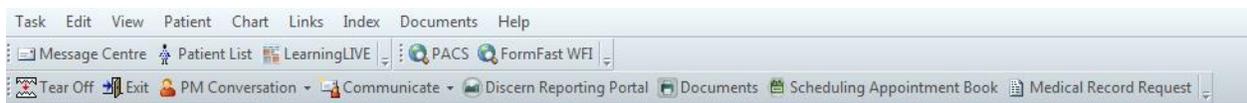
- ? Take a look at your current screen:
 What is your patient’s age: _____
 What is the encounter type: _____

Note the **Refresh** icon  and the timer showing how long ago the information on your screen has been updated.

- ? How long ago the information display was refreshed? _____



- 9 The patient’s chart opens in your current default view. This view is organized with tabs – each designed to support specific workflows and allow quick and convenient access to support your work. You might have other tabs available depending on your role.



10 The **Menu** (left side of window) navigates to all patient chart components. The components allow for reviewing a patient's chart in the most efficient way and are similar to a paper chart. Typically, HIM staff will access the **Notes** tab. Other tabs that HIM staff may refer to are the **Documentation** tab and the **Results Review** tab.



? What is the top item on your Menu list? _____

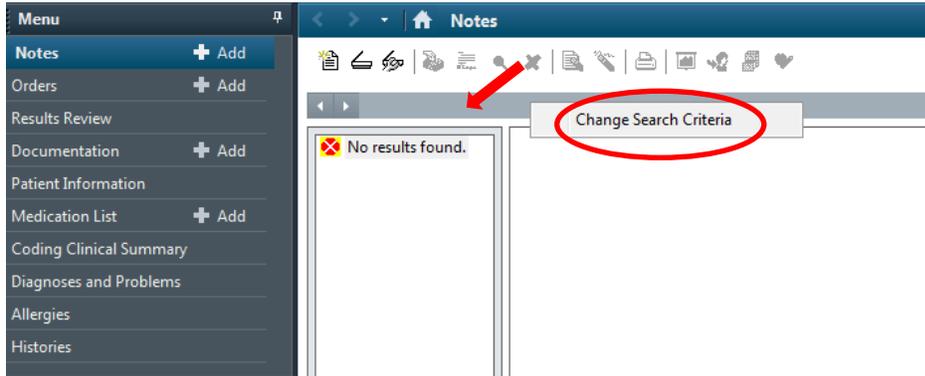
11 **Notes Tab**

The **Notes** tab displays all the documents on a patient's chart by Document Type. Under each Document Type, documents are listed by Date, Author and Document Title. This is designed so that you can quickly find a particular document that you may be looking for.

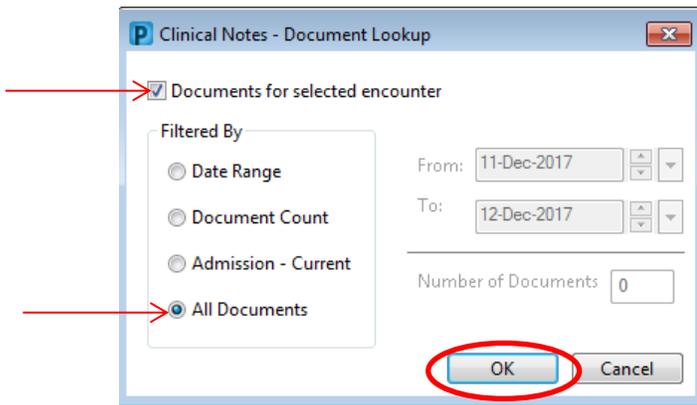
To see what's in each folder, you need to click on the folder to expand the listing of documents.

If you double-click on a specific document listed in the middle pane, the document will appear on the right-hand pane.

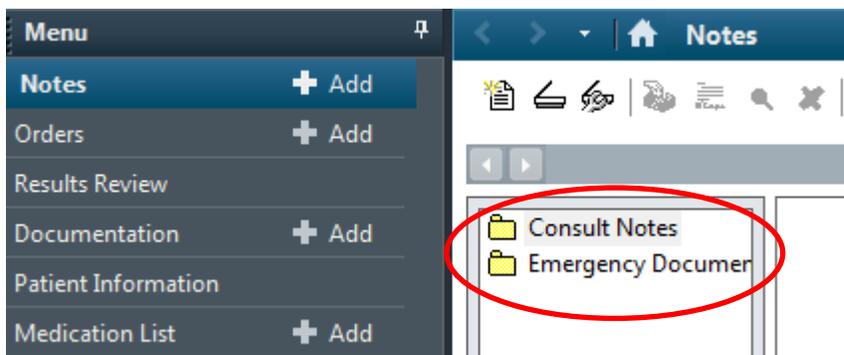
If you are in the Notes tab and the middle panel shows **“No results found”**, you may need to change the search criteria. To do so, right click anywhere on the gray bar next to the < > buttons. The Change Search Criteria button will appear. Click on it.



Check on **Documents for selected encounter** and click on **All Documents**. Click **OK**.



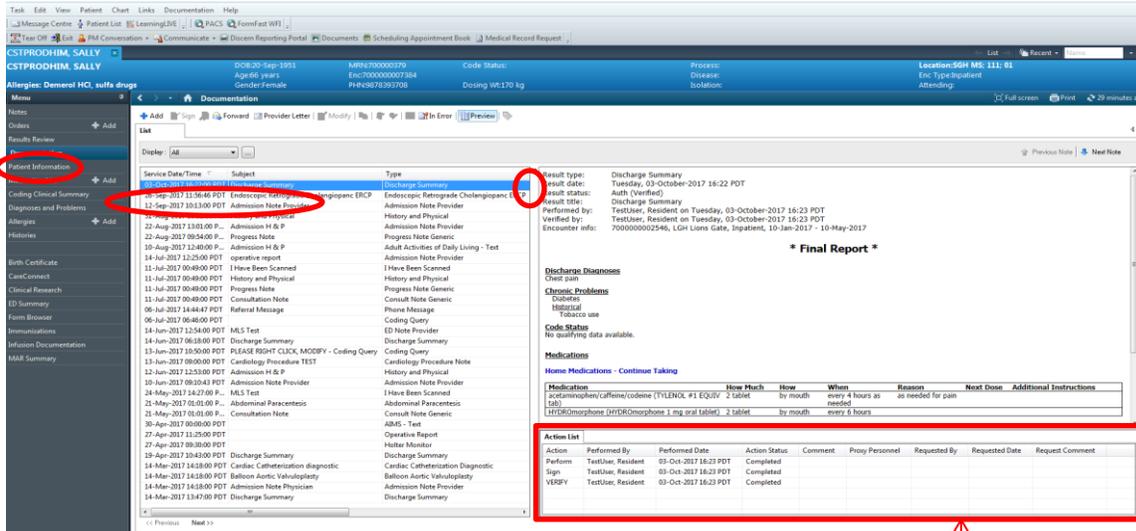
Your screen will then display all documents that belong to that encounter.



12 Documentation Tab

The **Documentation** tab displays all the documentation posted in PowerChart. This includes scanned documents, structured clinical documentation (Dynamic Documentation) and transcribed documents.

Click on the **Documentation** tab to display this view and get a full list of documents. Click one of the listed documents to display its content without leaving the view, and then click the black arrow between the 2 screens to remove the screen split. The document will display on the full page.



The lower pane displays all the activity related to this document by **lifting the skirt**.

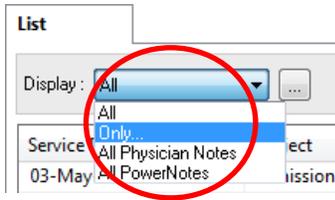
13 Documents viewable in PowerChart are displayed with a **Status**. In this example, the **Result Status** is **Verified**.

Result type: Discharge Summary
 Result date: Tuesday, 03-October-2017 16:22 PDT
Result status: Auth (Verified)
 Result title: Discharge Summary
 Performed by: TestUser, Resident on Tuesday, 03-October-2017 16:23 PDT
 Verified by: TestUser, Resident on Tuesday, 03-October-2017 16:23 PDT
 Encounter info: 7000000002546, LGH Lions Gate, Inpatient, 10-Jan-2017 - 10-May-2017

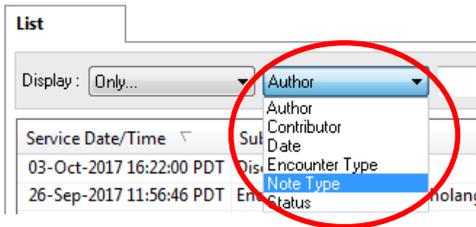
Status	Definition	Viewable in PowerChart?
Transcribed	Document has been dictated and transcribed and is awaiting final signature in Cerner. Also includes Refused Documents.	Yes
In Progress	Document created and saved in PowerChart but not yet signed by a clinician.	No
Unverified	Document signed by a clinician without the authority to provide a final signature (i.e. Resident).	Yes
Verified	Document signed by a clinician who has the authority to provide a final signature and clerical staff who have the authority to verify scanned documents.	Yes
Modified	Addendum added to a Verified document.	Yes
In Error	A document that has been in errored by user.	Yes
Anticipated	Shell document deficiency created by HIM for clinician to create document and complete.	No

14 You can filter documents to display in many ways.

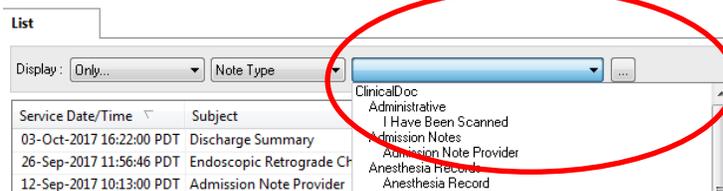
Click the down-arrow for the **Display** filter. Select **Only** from the drop down menu.



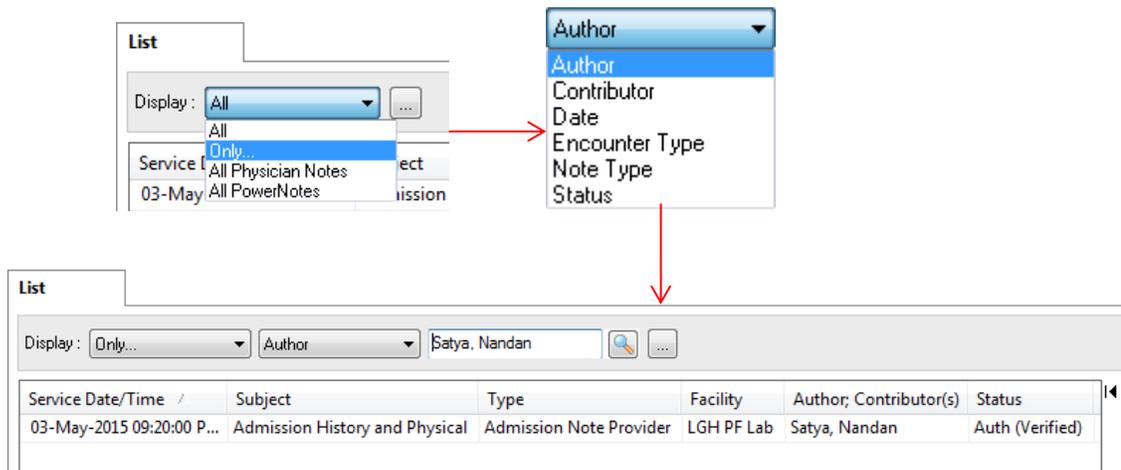
To further filter your results, select the appropriate filter form the second filter field.



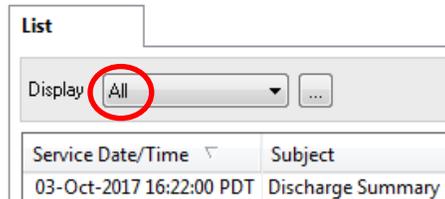
To further filter your results, a third filter field is available



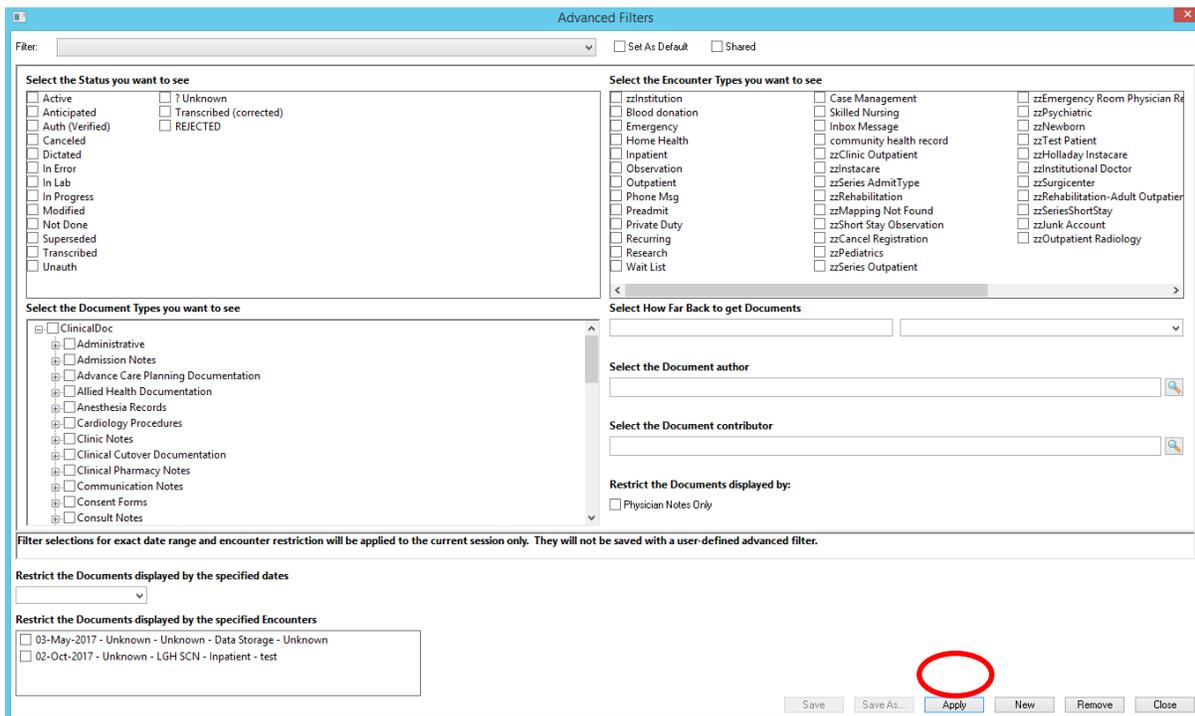
For example, you can display a specific providers documentation only. To show documents from a specific provider only, click on **Display** and select **Only**, then click on **Author** and choose the specific provider by entering their name in the field next to Author or using the search button to find the specific providers name.



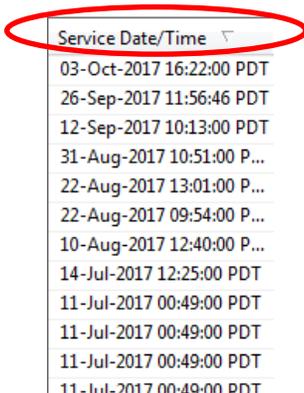
- 15 Click  to search for a document using **Advanced Filters**.



- 16 The **Advanced Filters** window will appear and you can choose to filter by the different criteria listed in the window. Once you have selected your filters, click **Apply**.



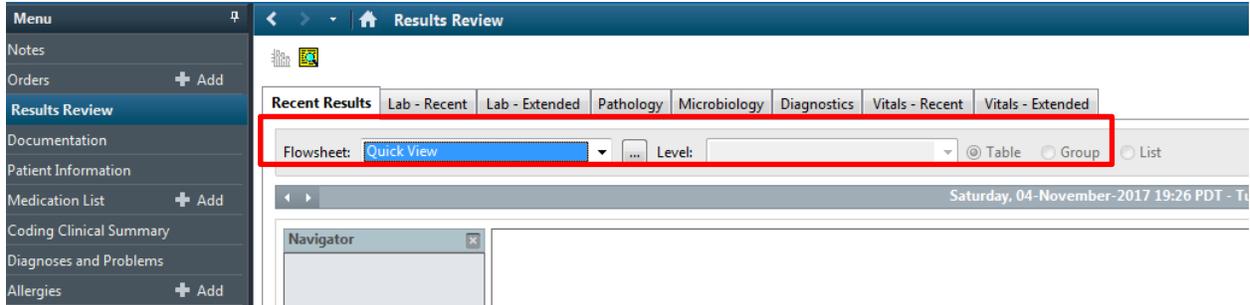
- 17 You can also sort the list in different order by clicking the column heading, for example to display notes in chronological order, you can click on **Service Date/Time**.



Results Review Tab

All results posted in PowerChart are in the Results Review.

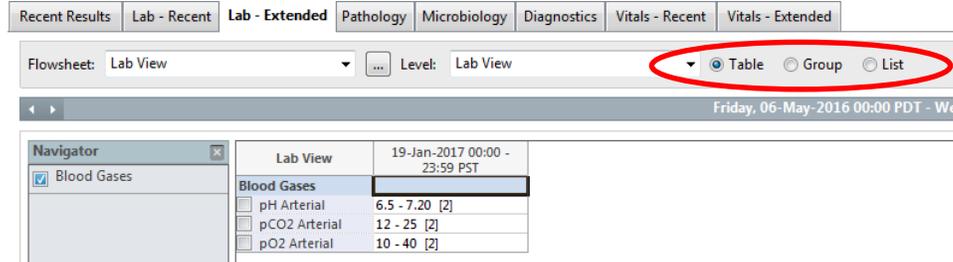
- 1 Click on the **Results Review** tab. The review is organized into different tabs. Different users will have different tabs.



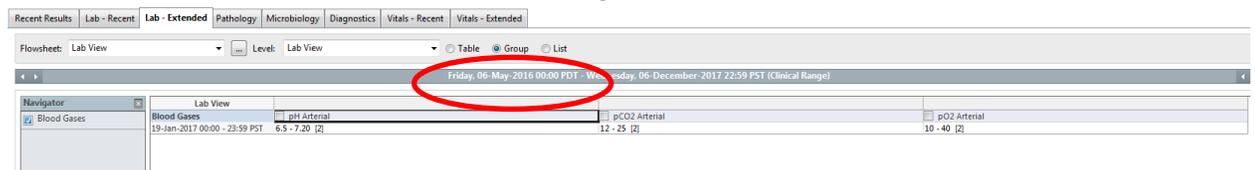
- The **Recent Results** tab lists displays results posted to PowerChart in the last 3 days including documents. Select the other tabs to see more specific results.
- **Lab - Recent** allows you to view lab results by test. By default it shows the most recent week, but you can go back as far as needed.
- **Lab - Extended** has a more condensed view. All tests are grouped together in one cell and if you need to see more detail, you need to click the cell to expand.

- 2 You can view the lab results by **Table**, **Group** and **List** using the radio buttons.

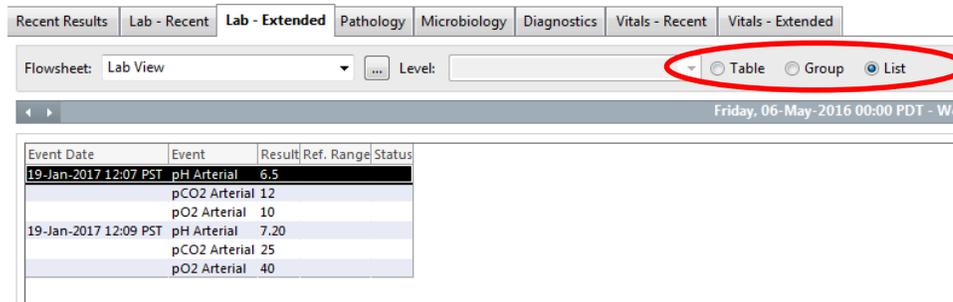
Your screen will look similar to this for a **Table** view.



Your screen will look similar to this for a **Group** view.

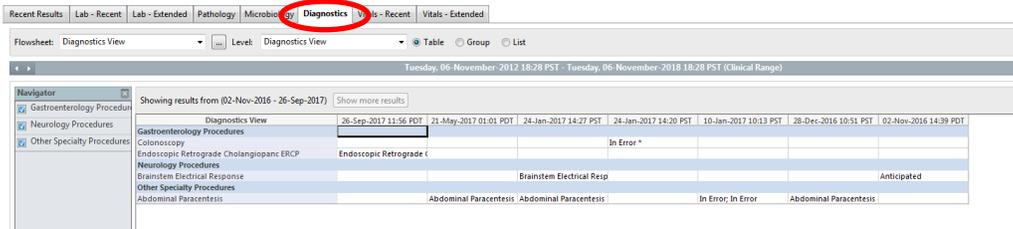


Your screen will look similar to this for a **List** view.

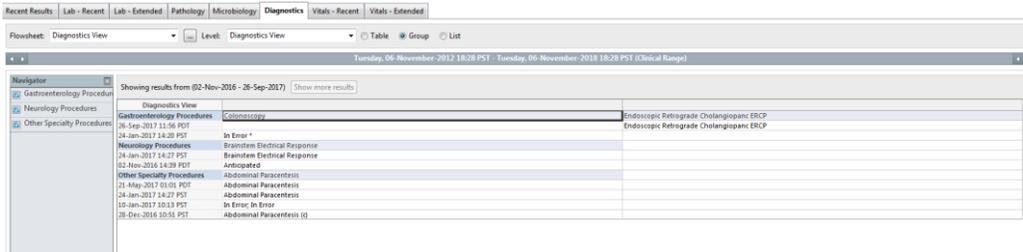


3 Click on the **Diagnostics** tab to see all Medical Imaging performed.

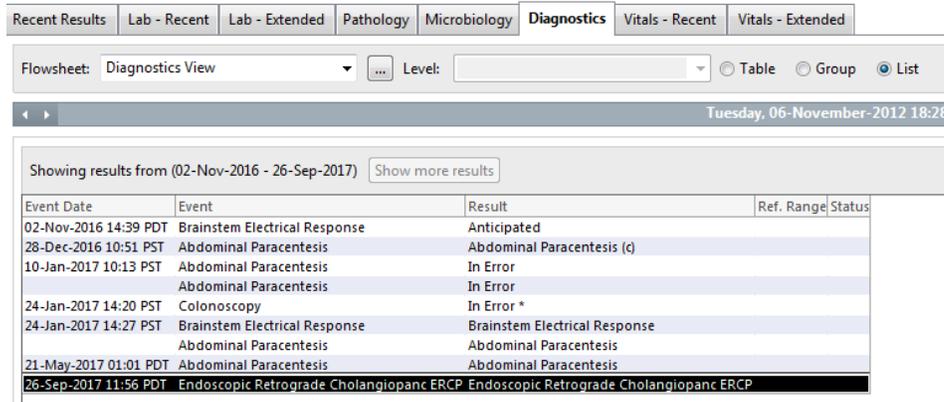
Your screen will look similar to this for a **Table** view.



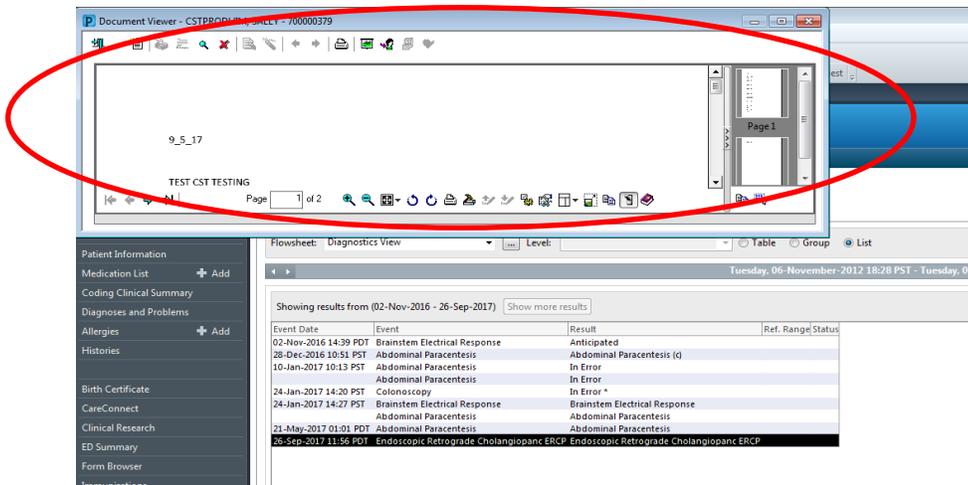
Your screen will look similar to this for a **Group** view.



Your screen will look similar to this for a **List** view.



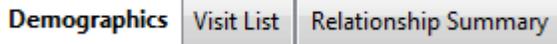
4 To view a Diagnostic report, select the **List** view and double click on the report. The report will display within the Document viewer window.



Patient Information Tab

1 The Patient Information tab contains three useful tabs including:

- **Demographics**
- **Visit List**
- **Relationship Summary** – The Relationship Summary is a summary of PowerChart users who have accessed the chart.



2 Click on the **Patient information** tab, select the **Demographics** tab. Your screen should look similar to this.

Patient Demographics

Name: CSTRIDHIM, SALLY Preferred Name: CSTRIDHIM
 Date of Birth: 20-Sep-1951 00:00 PDT Age: 66 years
 Gender: Female VBP:
 Primary Language:
 Religion:
 Marital Status:
 Deceased Date/Time:
 Disease Alert:
 Process: Disease
 Location: Isolation

Addresses

Type	ADDRESS
Home	801 BROADWAY ST VANCOUVER, British Columbia V6L Previous 80 Broadway St Vancouver, British Columbia

Phone Numbers

Type	PHONE
Home	(604)967-4543

Identifiers

Type	ALIAS	ALIAS PREFIX OR
MHN	70000007394	MHN
BC PHN	9878393708	BC PHN

3 Select the **Visit List** tab. Your screen should look similar to this.

Visit List

Encounter Type	Location	Admit Date	Discharge Date	Encounter #	Medical Service	Reason for Visit
Admission	CGH 111	14-Nov-2017 09:59 PST	14-Nov-2017 10:58 PST	70000001811	Cardiology	chest pain
Recurring	LGH 48 422 01	18-Jan-2017 10:13 PST	18-May-2017 09:39 PST	70000001246	Cardiology	ill
Recurring	LGH IP Lab	05-Dec-2016 14:13 PST	26-May-2017 10:00 PST	70000001283	Respiratory	asth
Recurring	LGH IP Lab	05-Dec-2016 11:05 PST	05-Dec-2016 11:25 PST	70000001284	Respiratory	shortness of breath
Outpatient	LGH IP Lab	02-Nov-2016 11:49 PST	02-Nov-2016 11:49 PST	70000001444	Respiratory	shortness of breath
Recurring	SGH 145 106 02	02-Nov-2016 08:49 PST	02-Nov-2016 11:04 PST	70000001429	Internal Medicine	shortness of breath
Recurring	LGH IP Lab	20-Sep-2016 09:34 PST	24-May-2016 09:26 PST	70000000465	Internal Medicine	test
Pre-Recuring	LGH IP Lab	21-May-2017 10:00 PST	21-May-2017 10:00 PST	70000001228	Respiratory	test
Pre-Recuring	LGH Clinic	21-May-2017 10:00 PST	21-May-2017 10:00 PST	70000001189	Internal Medicine-General	test
Pre-Recuring	LGH IP Lab	21-May-2017 10:00 PST	21-May-2017 10:00 PST	70000001749	Respiratory	asth/asth
Pre-Recuring	SGH PACU	20-Aug-2017 10:52 PST	20-Aug-2017 10:52 PST	70000001742	Peri-Surgery	demo
Pre-Recuring	LGH Card Clinic	21-Aug-2017 10:51 PST	21-Aug-2017 10:51 PST	70000001766	Orthopedic Surgery	Surgery
Pre-Recuring	LGH SE			70000001827	Emergency	ill

Encounter Information

Admit Date/Time: 11-Jul-2017 00:40 PST Admit Source: Direct
 Encounter Type: Equivalent Medical Service: General Surgery
 Reason for Visit: demo Isolation Code:
 Accommodation: Private Unit/Clinic: SQ105
 Room: 111 Bed: 01
 Relationships: Type: NMBE; Card Manager; Pain, Sple
 Health Plan Information: Type: FULTI NMBE; ROUR NMBE; MSP; BC Resident MSP -- MSP

Guarantor and Contacts

4 Click on the **Relationship Summary** tab. Your screen should look similar to this.

Relationship Summary

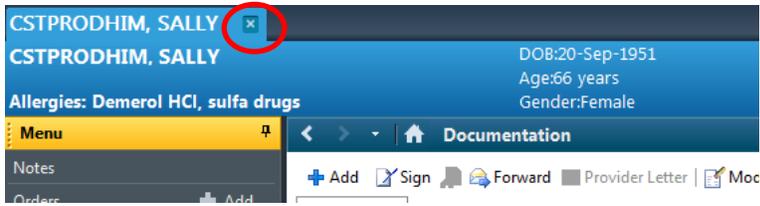
Lifetime Relationships My Relationships Only Active Relationships Only

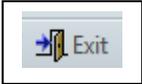
Name	Relationship	Status	Begin Date	End Date	Physician Service
Phiroo, Rayford, MD	Primary Care Physician	Active	02-Nov-2016		Oncology

Visit Relationships My Relationships Only Active Relationships Only

Selected Name	Relationship	Status	Begin Date	End Date	Physician Service/Admit Date	Discharge Date	Fin Number	Medical Service	Facility	Location
TestUser, MedicalStudent	Consulting Provider	Active	25-Sep-2017				700000010827	Emergency	LGH Liens Gate	LGH SE
TestUser, Coder-HBM	HBM Coder	Active	25-Sep-2017				700000010827	Emergency	LGH Liens Gate	LGH SE
TestUser, ManagerSupervisor-HBM	HBM Manager Supervisor	Active	02-Oct-2017				700000010827	Emergency	LGH Liens Gate	LGH SE
X Pain, Sple	Data Management	Active	06-Nov-2017	11-Jul-2017	11-Jul-2017	11-Jul-2017	700000007394	General Surgery	SGH Squamish	SGH 145 111 01

- 5 Note: You can have up to two charts open at one time. Click the **X** at the top of a chart to close a patient chart.



- 6  Remember to logout of Cerner when you are finished viewing patient information. Always use the Cerner Exit button on the toolbar. The red cross in the top right corner does not close down your session properly.

ACTIVITY 6 – Printing from PowerChart – Medical Record Request (MRR)

Learning Objectives

At the end of this activity, you will be able to:

- Print / Fax a Single Document Using MRR
- Print / Fax an Encounter/Visit Using MRR
- Print / Fax a Portion of an Encounter/Visit Using MRR

Activity 6.1 – Printing / Faxing a Single document Using MRR

For HIM staff (after hours), who are processing urgent ROI requests, use the Medical Records Request (MRR) functionality within PowerChart to print/fax documents.

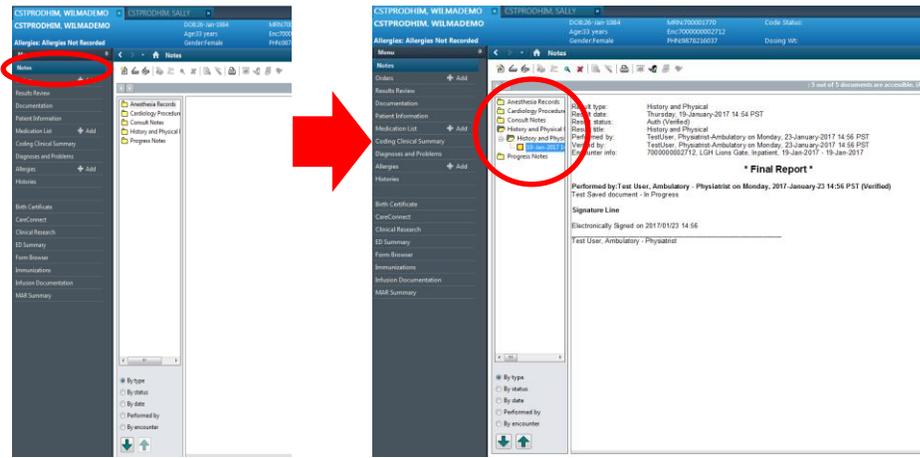
- 1 In PowerChart, search for the patient and select the appropriate encounter. Click **OK**.

The screenshot shows the 'Encounter Search' window in PowerChart. On the left, there are input fields for BC PHN, MRN (700001770), Last Name, First Name, DOB, Gender, Postal/Zip Code, Any Phone Number, Encounter #, Visit #, and Historical MRN. There are 'Search' and 'Reset' buttons at the bottom of this section. The main area displays a table of search results. The table has columns: Facility, Encounter #, Visit #, Enc Type, Med Service, Unit/Clinic, Room, Bed, Est Arrival Date, and Reg Date. One row is highlighted with a red circle: Facility: LGH Lions Gate, Encounter #: 7000000002712, Visit #: 7000000002728, Enc Type: Inpatient, Med Service: Emergency, Unit/Clinic: LGH ASC, Room: ASC, Bed: 02, Est Arrival Date: 19-Jan-2017 12:00, Reg Date: 19-Jan-2017 12:00. At the bottom right, the 'OK' button is circled in red.

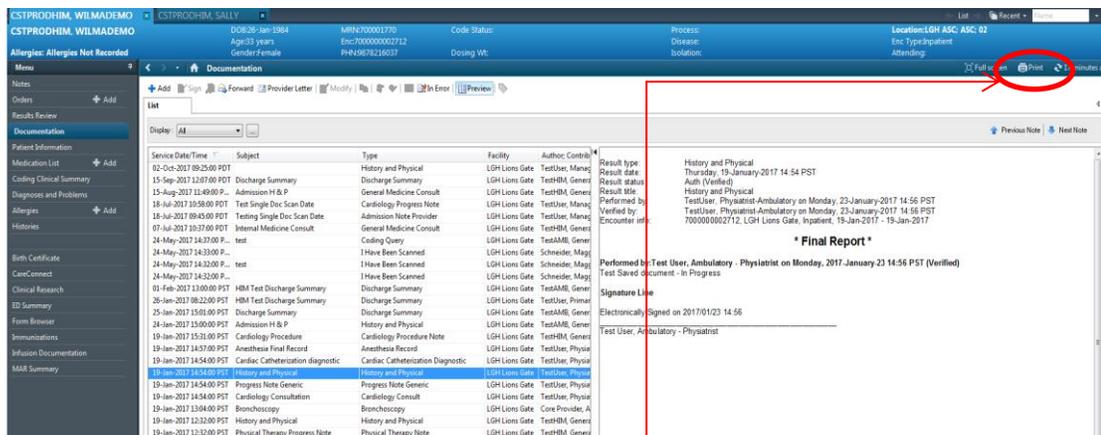
Facility	Encounter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room	Bed	Est Arrival Date	Reg Date
LGH Lions Gate	7000000012223	7000000012290	Outpatient	Geriatric Medicine	LGH Endoscopy	Procedure 1	01		18-Oct-2017 10:00
LGH PF Lab	7000000012214	7000000012281	Outpatient	Respirology	LGH PF Lab				18-Oct-2017 9:43
LGH Lions Gate	7000000011217	7000000011279	Inpatient	General Surgery	LGH 6W	607	03		02-Oct-2017 9:16
LGH Lions Gate	7000000002713	7000000002729	Inpatient	zzInternal Medicine	LGH ECC	224	01		19-Jan-2017 12:00
LGH Lions Gate	7000000002712	7000000002728	Inpatient	Emergency	LGH ASC	ASC	02		19-Jan-2017 12:00
EGH Evergreen	7000000002711	7000000002727	Inpatient	Residential	EGH ES3	E308	01		19-Jan-2017 12:00
EGH Evergreen	7000000002710	7000000002726	Inpatient	Residential	EGH ES2	E208	01		19-Jan-2017 12:00
EGH Evergreen	7000000002709	7000000002725	Inpatient	Residential	EGH EN2	E254	01		19-Jan-2017 11:58
EGH Evergreen	7000000002708	7000000002724	Inpatient	Residential	EGH EN1	E152	04		19-Jan-2017 11:54
LGH Lions Gate	7000000002707	7000000002723	Inpatient	Neonatology	LGH 4E	420	01		19-Jan-2017 11:50
LGH Lions Gate	7000000002706	7000000002722	Inpatient	zzENT	LGH 3PD	306	02		19-Jan-2017 11:39
LGH Lions Gate	7000000002705	7000000002721	Inpatient	Dermatology	LGH 2E	218	02		19-Jan-2017 11:37
LGH Lions Gate	7000000002627	7000000002643	Inpatient	Gastroenterology	LGH 5E	518	01		13-Jan-2017 15:35

2 There are two options:

- a) You can open the **Notes** tab from the **Menu**. Find the document you wish to release from the listing in the column with the folders by expanding the folders and searching. You can also use the filter below the column listing to view documents by Type, Status, Date, Performed by and By Encounter.

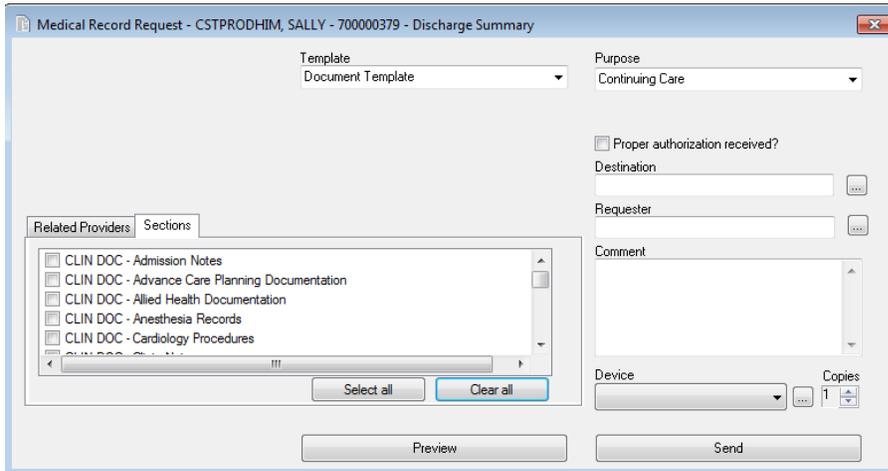


- b) You can use the **Documentation** tab, within the **List** tab and click on the document you want to release. The document will appear in the right window pane.

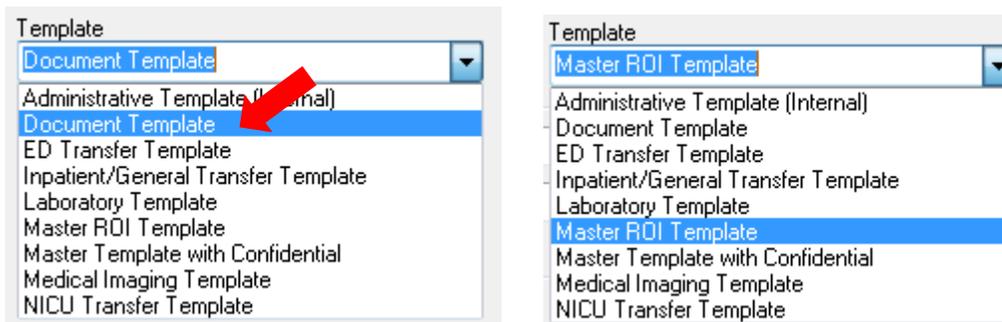


3 Click the **Print** button

- 4 The Medical Record Request dialogue box will appear.

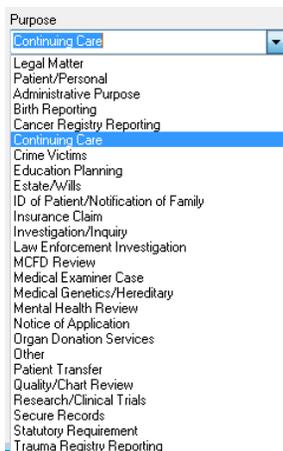


- 5 For **Template**, choose the appropriate template. The available report templates will depend on what you are trying to print. Click on the down arrow to display the option(s). Typically, HIM staff will choose Document Template for a single document or Master ROI Template for an entire encounter/visit.



Selecting an invalid template type will yield **no** printout.

- 6 For Purpose, select **Continuing Care**.



- 7 Click the **Proper authorization received?** box as this is for continuity of care purposes.

Proper authorization received?

- 8 In the **Destination** field, enter **HIM ROI**.

Destination
HIM ROI

- 9 In the **Requester** field, leave blank.

Requester

- 10 The **Comment** box is free text – leave blank.

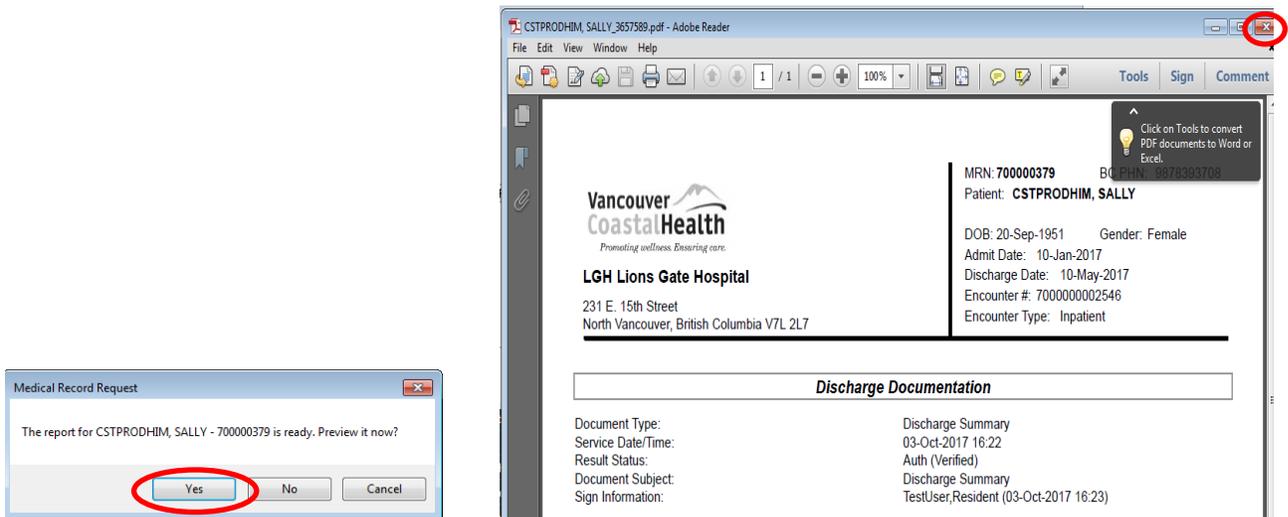
Comment

- 11 In the **Device** field, choose either the printer you want to print the documents to manually fax OR if you want to fax it directly from Cerner's RRD (Remote Report Distribution) select **Manual Fax**.

Device

- ManualFax
- 590_1stfl_t1
- 590_1stfl_t2

- 12 If you want to **print the documents**, click on the **Preview** button  to get a print preview of the document. It is recommended to preview your document to ensure you have the correct patient and the correct information.

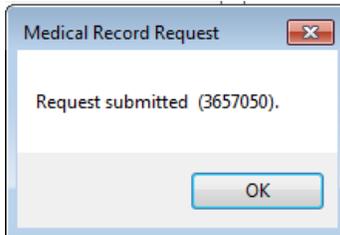


The screenshot shows the Adobe Reader interface. The main window displays a PDF document from Vancouver Coastal Health, LGH Lions Gate Hospital. The document contains patient information: MRN: 700000379, Patient: CSTPRODHIM, SALLY, DOB: 20-Sep-1951, Gender: Female, Admit Date: 10-Jan-2017, Discharge Date: 10-May-2017, Encounter #: 7000000002546, Encounter Type: Inpatient. Below this is a section for Discharge Documentation with details like Document Type: Discharge Summary, Service Date/Time: 03-Oct-2017 16:22, Result Status: Auth (Verified), Document Subject: Discharge Summary, and Sign Information: TestUser, Resident (03-Oct-2017 16:23). A 'Medical Record Request' dialog box is open in the foreground, with the message 'The report for CSTPRODHIM, SALLY - 700000379 is ready, Preview it now?' and the 'Yes' button circled in red. In the top right corner of the Adobe Reader window, the 'X' close button is also circled in red.

Once document has been previewed, DO NOT print from the Adobe Reader, close the Adobe Reader window by clicking the **X** on the top right-hand corner.

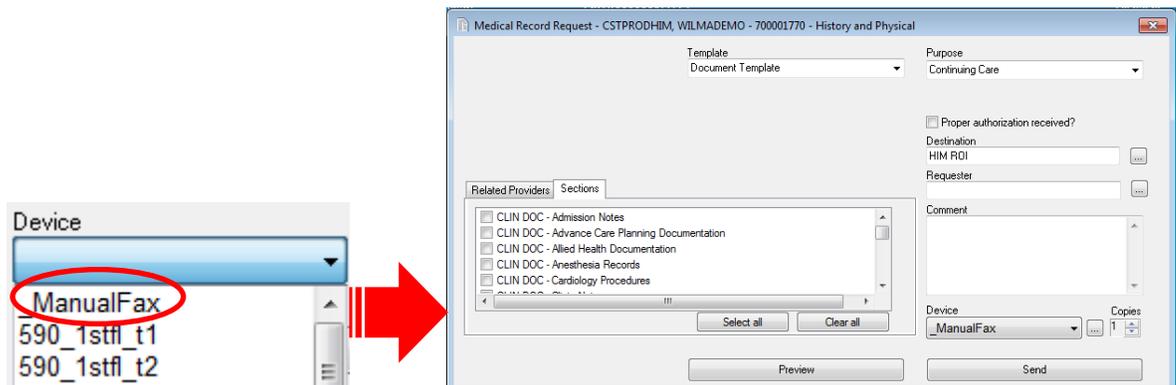
- 13 Click on the **Send** button  to print the document.

You will get the Medical Record Request dialogue box stating that the document has been submitted, click **OK**. Your document should print to your selected device (printer).



- 14 If you choose to **directly fax the document**, select **ManualFax** under **Device**.

Your screen should look similar to this.

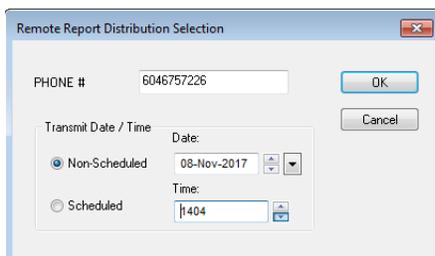


- 15 The Remote Report Distribution Selection (RRD) dialogue box will appear. Enter the fax number with no spaces or dashes (i.e. 6042227777).

If you want to send the fax immediately, leave the **Transmit Date / Time** as **Non-Scheduled**, as that is the default with the current date/time.

If you want to delay sending the fax, click on the **Scheduled** radio button and enter the date/time you want to fax the document(s).

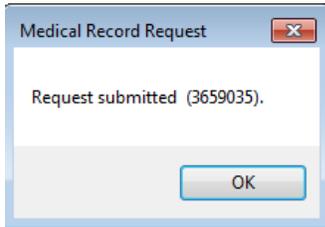
Click **OK**.



- 16 The MRR window will re-appear and you have to click **Send** button



- 17 A Medical Record Request dialogue box will appear stating that the fax has been submitted/sent.



Note: A fax cover sheet will be produced through Cerner RRD...here is a sample of what it will look like.



FAX COVER SHEET

DESTINATION FAX NUMBER: 6046752513

TRANSMIT DATE/TIME: 13-Feb-2018 12:11

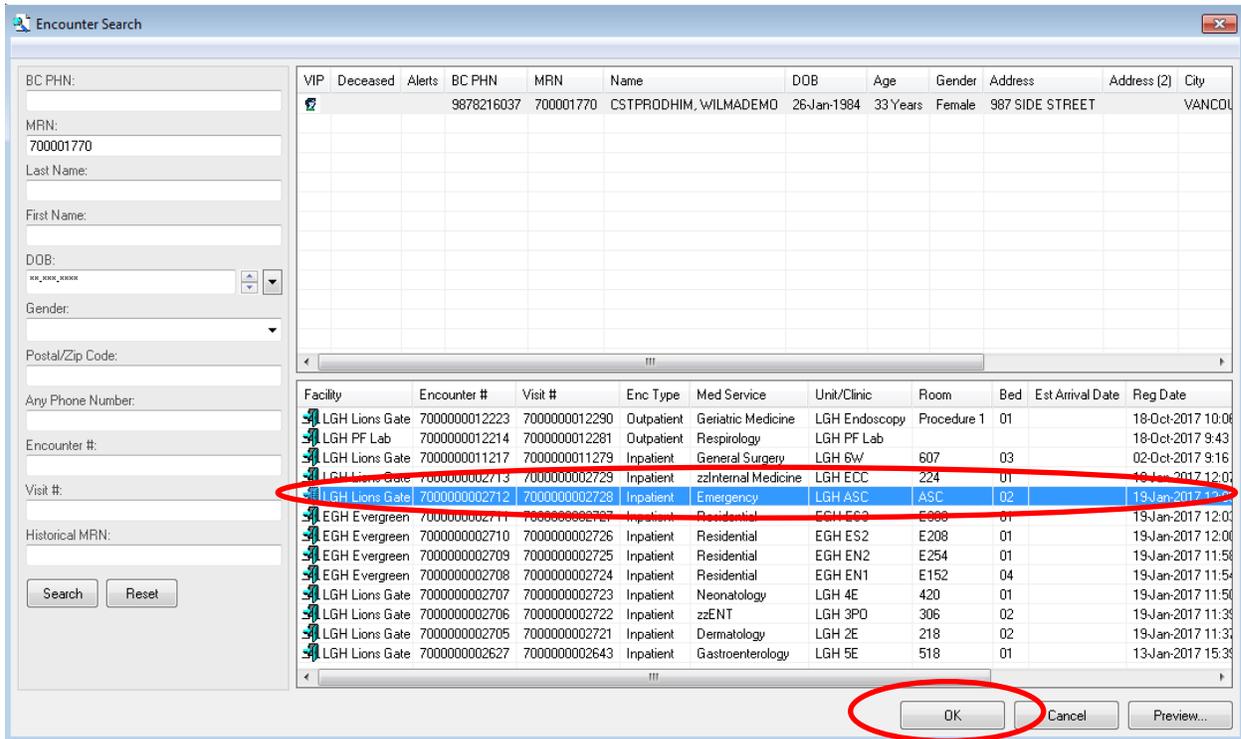
NUMBER OF PAGES [INCLUDING COVER SHEET]: 4

CONFIDENTIALITY NOTICE:

This facsimile is directed in confidence and is intended for use only by the individual or entity to which it is specifically addressed. Any other distribution is strictly prohibited. If you have received the facsimile in error, please notify the appropriate Privacy office at the phone number above immediately. Thank you for your cooperation.

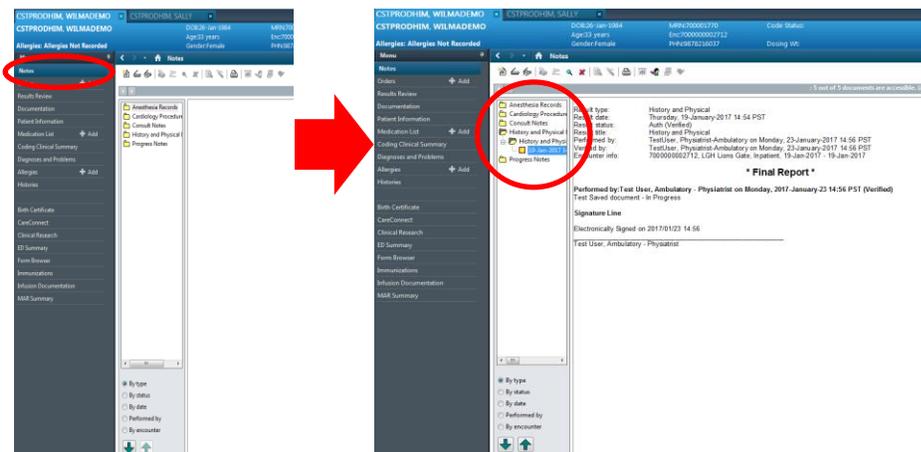
Activity 6.2 – Printing / Faxing an Encounter/Visit Using MRR

- 1 In PowerChart, search for the patient and select the appropriate encounter. Click **OK**.

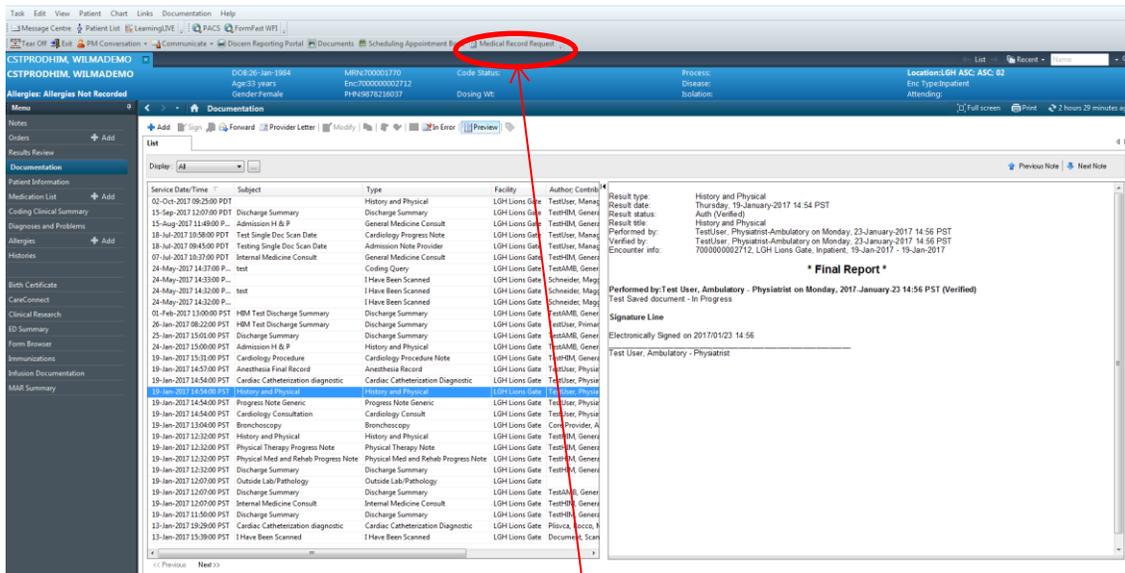


- 2 There are two options:

- You can open the **Notes** tab from the **Menu**. Find the document you wish to release from the listing in the column with the folders by expanding the folders and searching. You can also use the filter below the column listing to view documents by Type, Status, Date, Performed by and By Encounter.

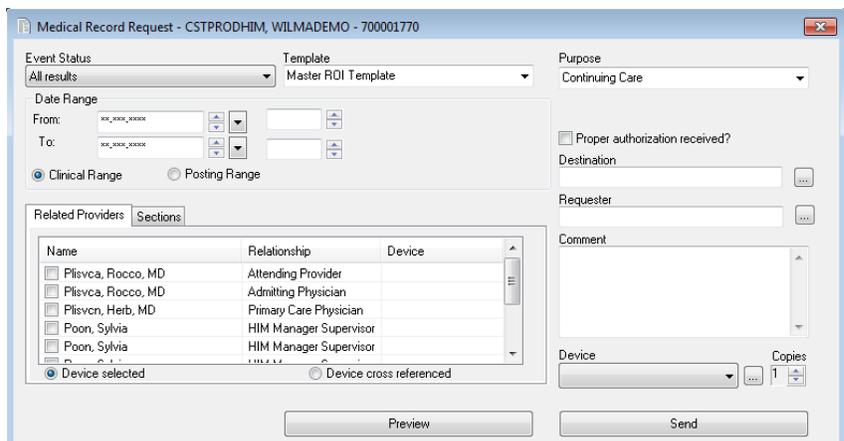


You can use the **Documentation** tab under the **List** tab and click on the document you want to release. The document will appear in the right window pane.

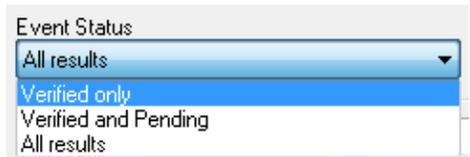


3 Click the Medical Record Request tab 

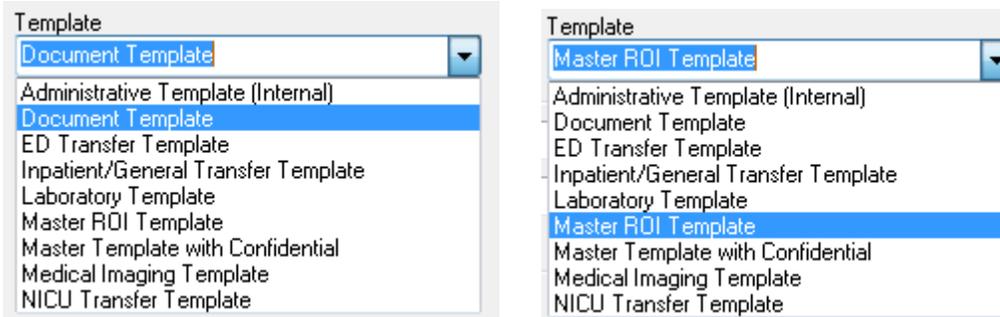
4 The Medical Record Request dialog box will appear.



5 For **Event Status**, choose the appropriate results status of the documents you wish to release. For continuity of care purposes, you will most likely want to produce **all results** whether or not reports have been signed or not.

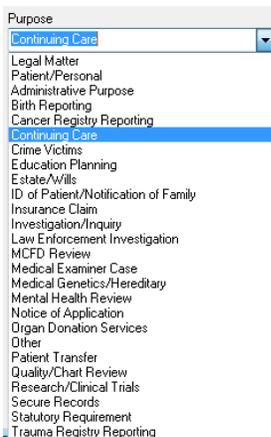


- 6 For **Template**, choose the appropriate template. The available report templates will depend on what you are trying to print. Click on the down arrow to display the option(s). Typically, HIM staff will choose **Document Template** for a single document or **Master ROI Template** for an entire encounter/visit.



Selecting an invalid template type will yield **no** printout.

- 7 For **Purpose**, select **Continuing Care**.



- 8 Review the **Date Range fields** and ensure the from and to fields are left blank.



Clinical Range: The date the results are relevant to the clinical encounter
 Posting Range: The date the results were posted.

- 9 Click the **Proper authorization received?** box as this is for continuity of care purposes.



- 10 In the **Destination** field, enter **HIM ROI**.



- 11 In the **Requester** field, leave blank.

- 12 The **Comment** box is free text – leave blank.

- 13 In the **Device** field, choose either the printer you want to print the documents to manually fax OR if you want to fax it directly from Cerners RRD (Remote Report Distribution) select **Manual Fax**.

- 14 If you want to print the documents, click on the **Preview** button  to get a print preview of the document. If sending all documents related to an encounter, you should always preview your documents to ensure you have the correct patient and the correct information.

Medical Record Request

The report for CSTPRODHIM, SALLY - 700000379 is ready. Preview it now?

Yes No Cancel

Adobe Reader

CSTPRODHIM, SALLY_3657589.pdf - Adobe Reader

File Edit View Window Help

Tools Sign Comment

Click on Tools to convert PDF documents to Word or Excel.

MRN: 700000379 BC PHN: 9873393708
Patient: CSTPRODHIM, SALLY

DOB: 20-Sep-1951 Gender: Female
Admit Date: 10-Jan-2017
Discharge Date: 10-May-2017
Encounter #: 700000002546
Encounter Type: Inpatient

Vancouver Coastal Health
Promoting wellness. Ensuring care.

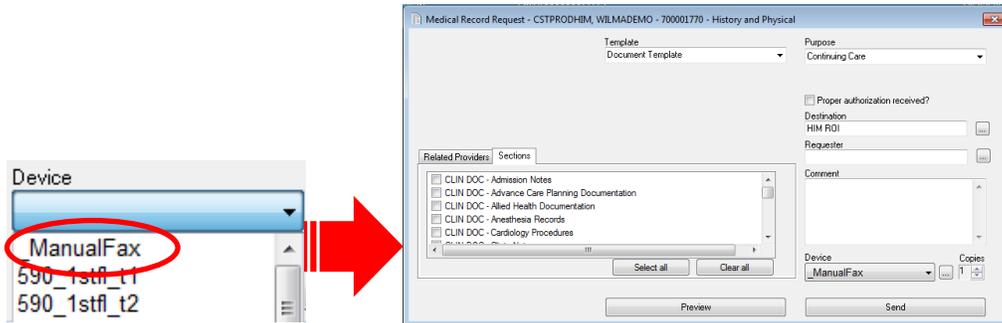
LGH Lions Gate Hospital
231 E. 15th Street
North Vancouver, British Columbia V7L 2L7

Discharge Documentation

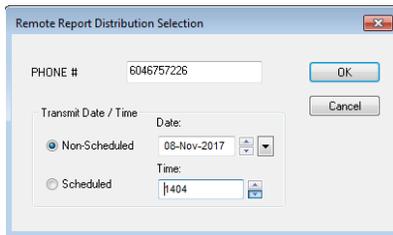
Document Type:	Discharge Summary
Service Date/Time:	03-Oct-2017 16:22
Result Status:	Auth (Verified)
Document Subject:	Discharge Summary
Sign Information:	TestUser, Resident (03-Oct-2017 16:23)

Once document has been previewed, DO NOT print from the Adobe Reader, close the Adobe Reader window by clicking the **X** on the top right-hand corner.

- 15 If you choose to **directly fax the document**, select **ManualFax** under **Device**. Your screen should look similar to this.

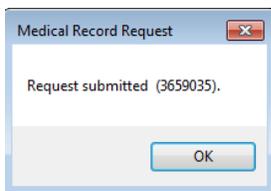


- 16 The Remote Report Distribution Selection (RRD) dialogue box will appear. Enter the fax number with no spaces or dashes (i.e. 6042227777).
If you want to send the fax immediately, leave the **Transmit Date / Time** as **Non-Scheduled**, as that is the default with the current date/time.
If you want to delay sending the fax, click on the **Scheduled** radio button and enter the date/time you want to fax the document(s).
Click **OK**.



- 17 The MRR window will re-appear and you have to click **Send** button 

- 18 A Medical Record Request dialogue box will appear stating that the fax has been submitted/sent.



Activity 7.3 – Printing / Faxing a portion of an Encounter/Visit Using MRR

In situations where the ROI request is for an encounter/visit that is long (i.e. long length of stay) and the number of documents associated with the encounter would be voluminous, you may wish to choose that encounter and define a **Date Range** and/or identify **Sections** in the MRR window. For example, if a patient's length of stay is two months, you may want to only send the last two weeks of documentation or send only the primary documents.

When printing out results, HIM staff should use the Clinical Range.

- 1 For the first practice example, we will set the parameters for documents for the last 5 days of an Inpatient encounter with a long length of stay.

Using the Patient Search icon , search for Chart One. Select the Inpatient encounter. Use the scroll bar to expand the patient visit histories listing. Click **OK**.

- 2 Click on the **Medical Record Request** tab  **Medical Record Request**.

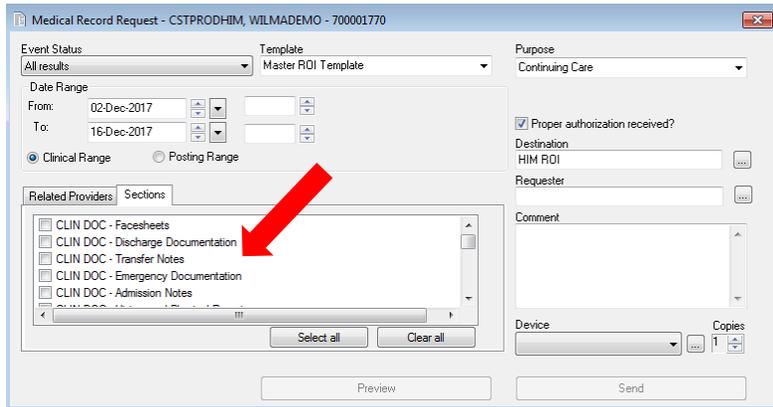
- 3 Enter the date parameters in the MRR dialogue box as the last 5 days.

- 4 For the second practice example, if the requester specifies the specific documents they are looking for, you can set the parameters for these specific documents of an Inpatient encounter with a long length of stay.

Using the Patient Search icon , search for Chart One. Select the Inpatient encounter. Use the scroll bar to expand the patient visit histories listing. Click **OK**.

- 5 Click on the **Medical Record Request** tab 

- 6 Select the documents under the **Sections** tab in the MRR dialogue box.



*Note: If you do not select a **Section**, then all sections will be selected as a default.*

Under the **Related Providers** tab you will see a historical listing of all personnel who have accessed this patient’s record.

Related Providers		Sections
Name	Relationship	Device
<input type="checkbox"/> Poon, Sylvia	HIM Manager Supervisor	
<input type="checkbox"/> TestUser, Cardiologist-Physician, MD	Consulting Provider	
<input type="checkbox"/> Train, Emergency-Physician8, MD	ED Provider	
<input type="checkbox"/> Train, GeneralMedicine-Physician7, MD	Primary Care Physician	
<input type="checkbox"/> Train, GeneralMedicine-Physician7, MD	Attending Provider	