WORKPACKAGE CST Transformational Learning

CURRICULUM TRACK:

Health Information Management: Foundational



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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

Chris Receiver - Windows Internet Explorer	mat 🗽 Home Unve 🛛 🖉 Anestriesia 📲	PowerCrian (2) PMOffice (2) Sc	Chedding Appt Book		User 1 • 🔒 😽 🖉 🕫	Dr. William Osler
Pavontes Pavontes Web Sirce Gallery					à•⊠•≘	🚔 👻 Page 🕶 Safety 👻 Tools 👻 👰 👻
Citrix StoreFront			FAVORITES DESKTOPS	DO DO APPS		
All Categories						Q, Search All Apps
Cerner Millennium CST	2 Emergency	HIM	5 Maternity	4 Oncolo	97 Pharmacy	
5 Pharmacy/Supply Chain	7 Registration	4 Scheduling	Surgery and Anesthesia			
Details Firstnet - ProdBC 107	Details PowerChart - ProdBC 107					

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.

😂 Cerner	
Cer	ner Millennium [®]
	User Name :
	Password :
	Domain :
	PRODX 🔽
	OK Cancel
© 2011 Cerner Corporation. All rights res Access and use of this solution system (incl Unauthorized use, access, reproduction, dis severe civil damages and criminal penalties	erved. using components thereof) require, and are governed by license(s) from Cerner Corporation. July or distribution of any portion of this solutions or the data constant therein may result in Further information may be found in they Acad.



Activity 1.2 – Logging Out of Cerner

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

Task	inquiry by Patient
	Inquiry by Location
	Chart Location Batch Update Mode
	Print Setup
	Label Print Setup
	Print Preview Chart List
	Print Chart List
	Print Preview Move List
	Print Move List
	Print Screen
	Suspend
	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.

🔶 🕞 🕼 https://cernerapps.cernerwork	rkswan.com/Citriv/P0783Web/ b Slice Gallery • 🕘 Forms Inventory 💽 h	P =	CernerWorkst ×	XenApp - Logon 🌘 Welcome to CernerWe	orks! 🗑 HBM - Document Imaging	- And	
😂 Cerner				BB APPS			INFOSYS\\ttan 🔻
All Categories							Activate Change password
Coding	Emergency	HIM	6 Maternity	14 Medical Imaging	Oncology	Pharmacy .	About Log Off
Scheduling	Supply Chain	5. Surgery and Anesthesia					
Discenfleportin. Sal	Armodal	Position Picker	Powerchart	Support Folder	User Folder		

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 € cerner	Chart Tra	icking	Tracking Icon	from the (Citrix Sto	reFront.		Menu *
	Categories > HI	M Applar H3M	Discern Reporting Portal	HM Patient Deficiency Ana H36	HIM Patient Information Re HUM	HM Physician Deficiency A HM	HIM Request Queue	HIM Task Queue HIM	Q Search All Apps
	Index Hild	PM CMice HM	Powerchart HM	Report Request HIM	Report Request Maintenan	Scheduling Appointment B			

The ProFile Tracking workspace opens.

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

ia 🖾 📴 🖩 🖬 🤅	•					Tracking ID:	
atient: tatus: atient type:	MRN: FIN nu Attend	mber: phys:	Birth date: A Juit John Facility:	Sex Dia	nage date.	SSN:	
	Т	acking: Currently No M	ode Selected				
	- Cł	hart Volur	ne Location	Movement Date	Admit Date	Discharge Date	Patient Type



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.

() ProFile: Tracking Task Application View	Help					
in 🖪 🖀 🖩 🖬 🔅	🕮 🖻 × 🖨 🏟 🕘 💹				Tracking ID	:
Patient: Status: Patient type:	MRN: FIN number: Attend phys:	Birth d Admit o Facility	ate: late: :	Sex: Disc	harge date.	SSN:
			Tracking: Cu	urrently No Mode Selec	ted	
		-	Chart	Volume	Location	Movement Date
		-				
		-				
		-				
			•	III		+
Ready.					PRO	DBC SPOON 1:57 PM

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.

ProFile: Tracking								
in 🖬 🖀 🌆 🔛 🎨 🐺 🛙	l ×	a 💩 🖑 🗊					Tracking ID: LGH	0000388005
Patient: CSTPRODHIM, SALLY Status: Patient type:	MR FIN Att	RN: 700000379 N number: tend phys:	Birth date: 20-Sep Admit date: Facility:	-1951	Sex: Female Discharge date:	SSN:		Þ
Charts : CSTPRODHIM, SALLY		Information for 'LGH-0000388006'						
Discharged: 12/5/2016 Discharged: 5/21/2017 Discharged: 5/21/2017 Discharged: 5/21/2017 Discharged: 5/21/2017 Discharged: 5/21/2017 Discharged: 5/21/2017 Discharged: 8/21/2017 Discharged:	4	Chart	Volume 2	Location LGH MissingChrt		Movement Date 4/5/2017	Admit Date	Discharge Date
		•		III				

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

() ProFile: Tracking					
Task Application View	w Help	4 m			Tracking ID:
Patient: Status: Patient type:	MRN: FIN number: Attend phys:	Birth date: Admit date: Facility:	Sex: Discharge	SSN: e date:	
	Tracking: Curre	ntly No Mode Selected			
	- Chart	Volume Location	Movement Date Ad	mit Date Discharge Date	Patient Type

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**.

BF PHN:	VIP	Deceased	Alerts	BC PHN	MBN	Name	D
		res Yes	Interpreter Required	9878180947	700002254	CSTPRODHIM, STEST	0
MBN:	2		Disease Alert	9878393786	700000378	CSTPRODHIM, SALLYDEMO	20
	2			9878393708	700000379	CSTPRODHIM, SALLY	2
ast Name:	2				700002010	CSTPRODHIM, SMOKE ZERO ONE NINE	1
CSTPBODHIM	2			9878108059	700002706	CSTPRODHIM, SINGLE	2
Test Manager				9878020502	700003280	CSTPRODHIM, STESTTWO	0
e e e e e e e e e e e e e e e e e e e				9878020494	700003345	CSTPRODHIM, STESTTHREE	0
2				9876964808	700003757	CSTPRODHIM, SCANNINGDOCUMENT	1
DOB:			Process Alert	9876781573	700005183	CSTPRODHIM, STESTFOUR	0
//****	÷ - 4			9876781527	700005188	CSTPRODHIM, STESTFIVEG	C
Gender:	2			9876720924	700006219	CSTPRODHIM, SCANTEST	2
	Ø			9876598616	700006667	CSTPRODHIM, SUSPENSIONISSUE	1
	2			9876541468	700007350	CSTPRODHIM, STESTSIX	0
				3876541383	7000099999	CSTPRODHIM; STESTSEVEN	l
Any Phone Number:							
Encounter #:							
Visit #:							
Historical MRN:							
	/						
Search Reset							

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

() ProFile: Tracking Task Application View Help							
n 🖪 🖀 🎫 🛍 🗰 💷 🔍 🗙	a 🔄 🖑 🗊					Tracking IE	:
Patient: CSTPRODHIM, SALLYDEMO Status: FIN Patient type: Att	MRN: 700000378 I number: end phys:		Birth date: 20-Sep-1951 Admit date: Facility:	Sex: Female Discharge da	e SSN: ate:		Þ
Charts : CSTPRODHIM, SALLYDEMO	Contents for CSTPRODE	IIM, SALL'	YDEMO				
Patient: CSTPRODHIM, SALLYI	Chart	Volume	Location	Movement Date	Admit Date	Discharge Date	Patient Type
Discharged: 10/2/2017	🛅 LGH-0000392005	1	LGH PrimaryStorage	2/10/2017			
Discharged: 7/6/2017	🛱 SGH-0000408015	1	SGH Historical	7/11/2017			
Discharged: 5/14/2017	📛 SGH-0000408016	2	SGH Historical	7/11/2017			
Discharged: 1/18/2017							
Discharged: 11/2/2016							
Discharged: 11/17/2016							
Discharged: 11/1/2016							
=1 Discharged: 9/27/2016 🔹							



Profile Tracking Screen

ent: CSTPRODHIM, SALLYDEM us: F Set fur: A	0 MRN: 700000378 'IN number: Attend phys:	Birth d Admit o Facility	ate: 20-Sep-1951 date: r:	Sex: Female SSN: Discharge date:			
arts : CSTPRODHIM, SALLYDEM	Contents for CSTPRODH	IM, SALLYDEMU					
Patient: CSTPRODHIM, SALLYD	Chart	Volume	Location	Movement Date	Admit Date	Discharge Date	Patient Type
Discharged: U2-Uct-2017	🗯 LGH-0000392005	1	LGH PrimaryStorage	10-Feb-2017			
Discharged: 05-Jul-2017	🐚 SGH-0000408015	1	SGH Historical	11 Jul-2017			
Discharged: 14-Mau-2017	SGH-0000408016	2	SGH Historical	11 Jul-2017			
Discharged: 18-Jan-2017							
Discharged: 02-Nov-2016							
Discharged: 17-Nov-2016							
Discharged: 01-Nov-2016							
📑 Discharged: 27-Sep-2016							
Discharged: 31-Aug-2017							
LGH-0000392005							
· 🔤 30H-0000400010							

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.

() ProFile: Tracking									×
	< 🖴 🖨 🖑 🗓						Track	ing ID:	
Patient: CSTPRODHIM, SALLYDEMO Status: Fil Patient type: At	MRN: 700000378 N number: tend phys:	Birth date: Admit date Facility:	20-Sep-1951 :	Sex: Female Discharge date:	SSN:				Þ
Charts : CSTPRODHIM, SALLYDEMO	Information for 'LGH-0000392	005'							
Patient: CSTPRIDHIM, SALLYDEMO Discharged: 02/04/2017 Discharged: 02/04/2017 Discharged: 02/04/2017 Discharged: 05/u4/2017 Discharged: 18/uary/2017 Discharged: 18/uary/2017 Discharged: 18/uary/2017 Discharged: 17/Nov/2016 Discharged: 01/Nov/2016 SGH-0000408015 SGH-0000408015	Chart	Volume	Location LGH PrimaryStorage	Movement Date 10-Feb-2017		Admit Date	Discharge Date	Patient Type	
۰ (الاستان) •									

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 charts movement history, double-click on the desired chart volume.

ProFile: Tracking Task Application View Help								
🗽 🖪 🖀 🎬 籠 🗣 🗒 🗸	< 🖴 🕰 🕙 📴						Tracking ID:	
Patient: CSTPRODHIM, SALLYDEMO Status: FI Patient type: At) MRN: 700000378 N number: ttend phys:		Birth date: 20-Sep-1951 Admit date: Facility:	Sex: F Discha	emale rge date:	SSN:		Þ
Charts : CSTPRODHIM, SALLYDEMO	Contents for CSTPRODH	.LLYI	DEMO					
Petient: CSTPRODHIM, SALLYI Discharged 10/2/2017 Discharged 10/2/2017 Discharged 5/14/2017 Discharged 5/14/2017 Discharged 11/12/2016 Discharged 11/12/2016 Discharged 11/1/2016 Discharged 11/1/2016 Discharged 9/27/2016 Discharged 9/27/2016 Discharged 9/27/2016 Discharged 9/27/2016 Discharged 11/1/2016 Discharged 9/27/2016	Chart	Volume 1 1 2	Location LGH PrimaryStorage SGH Historical SGH Historical	Movement Date 2/10/2017 7/11/2017 7/11/2017	Admit Date	Discharge Date	Patient Type	

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

ProFile: Tracking								
	< 🖴 💩 🕚 🗊					Trac	king ID:	
Patient: CSTPRODHIM, SALLYDEMO Status: FII Patient type: At) MRN: 700000378 N number: ttend phys:	Birth date: 20-Sep Admit date: Facility:	-1951 Sex: Discł	Female arge date:	SSN:			Û
Charts : CSTPRODHIM, SALLYDEMO	Contents for CSTPRODHIM, SALI	YDEMO						
 Patient: CSTPRODHIM. SALLYDEN Discharged: 10/2/2017 Discharged: 10/2/2017 Discharged: 7/6/2017 Discharged: 7/6/2017 Discharged: 7/8/2017 Discharged: 1/18/2017 Discharged: 11/17/2016 Discharged: 11/17/2016 Discharged: 11/17/2016 Discharged: 8/31/2017 LGH-0000392005 SGH-0000408015 SGH-0000408016 	Chart Ch	Volume lected Charts' Location H Vol 2 In LGH Primary ia iation	Location		Movement Date 2/10/2017 7/11/2017 7/11/2017	Admit Date	Discharge Date	P
<			ш					+

The charts movement history is displayed.

lew 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**.

Tasl	k Application View Help		
	Inquiry by Patient		
	Inquiry by Location	Tracking: Label Printer/Format Setup	
	chart Eocation batch opuate Mode	Standard Label Printer	
	Print Sclup	Label Printer	
	Label Print Setup	Default printer	
	Print Preview Chart List	(currently page specific d)	
	Print Chart List		
	Print Preview Move List	Set as default printer	
	Print Move List		
	Print Screen		
	Suspend		
	Exit	OK Cancel	

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:

<u>ivieula i y</u>	pes
LGH	¥
LGH	
LGH-LOCK	
LGH-TEMP	
SGH	
SGH-LOCK	
SGH-TEMP	

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).



1 1 1 1 1 1 1 1 1 1				Irack
Patier :	MBN: FIN number:	Birth date: Admit date:	Sex: Discharge date:	SSN:
🕙 Patient Starch				×
BC PHN:	No persons found.			
MRN:				
Last Name:				
First Name:				
DOB:				
Gender:				
Postal/Zip Code:				
Any Phone Number:				
Encounter #:	/			
Visit #:				
Historical MRN:				
Jach Reset				

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.

편 Create A New Volume		- • •
All new volumes will be created for th	e following patient:	
Patient		
HIM-PatientTwo, Vickie		
Location view:	Media type:	
LGH Internal HIM	LGH	•
Scleet a location and media tupe and	click create volume:	:
		E
Default view	Create Volume	Cancel
Ready.		

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



All new volumes will be created for the following patient:	
Patient	
CSTPRODHIM, SALLY	
Location view: Media type:	
LGH Internal HIM	~
Select a location and media type and clic LGH	
LGH-LOUK	
LGH OffsiteStorage SGH-LOCK LGH-TEMP	
SGH-LOCK	
LGH Reception SGH-TEMP	
LGH Record Completion	
LGH Research	
LGH SecondaryStorage	
LGH SecuredCharts	
LGH Supervisor RM	
Create Volume Create Volume Cancel	
Ready.	

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.

ProFile: Tracking					
Task Application View Help					
🗽 🚨 🖀 🎫 🏝 💷 📓	(× 🖴 💩 🕘 📴				
Patient: HIM-PatientTwo, Vickie Status: Patient type:	MRN: 760000985 FIN number: Attend phys:	Birth date: 1983-Jan-21 Admit date: Facility:	Sex: Female Discharge date:	SSN:	
Charts : HIM-PatientTwo, Vickie	Contents for Million auent I wo, Vick	ie			
Palert. HIM Pater Two. Vicki Discharged 21Jan-2018 Discharged 21Jan-2018 Discharged 11Jan-2018 Discharged 11Jan-2018 Discharged 11Jan-2018 LGH-0000430005	Chart	Volum 1		Location LGH Historical	Movement Date 16-Mar-2018

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: ...

Patient: HIM-PatientTwo, Vickie MRN: Status: FIN nur Patient type: Attend	760000985 Birth date: 19 mber: Admit date: phys: Facility:	83-Jan-21	Sex: Female Discharge date:	SSN:
Chatts : HIM-PatientTwo, Vickie Patient: HIM-PatientTwo, Vickie Discharged: 21/an-2018 Discharged: 11/an-2018 Discharged: 11/an-2018 Discharged: 11/an-2018 LGH-0000430005	ntents for HIM-PatientTwo, Vickie Quick Update: Selected Charts Quick Update: Selected Charts Quick Create: LGH Vol 2 In LG Create New Media Purge Volumes Chart/Visit Association Print Chart List Print Labels Holds Notes	Volume 1 Cocation H Historical		Location LGH Historical

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
	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.

 ProFile: Tracking Task Application View Help № ▲ 管 摘 № ♥ ₩ ₩ × 	< 2 4 - D				
Patient: CSTPRODHIM, SALLY MI Status: FI Patient type: At	RN: 700000379 N number: tend phys:	Birth date: Admit date: Facility:	20-Sep-1951	Sex: Female Discharge date:	SSN:
Charts : CSTPRODHIM, SALLY	Contents for CSTPROD	HIM, SALLY			
🖃 🛉 Patient: CSTPRODHIM, SALLY 🔺	Chart	Volume	Location		Movement Date
Discharged: 11 Jul-2017	👛 LGH-0000388005	1	LGH Research		02-Nov-2017
Discharged: 14-Mar-2017	📛 LGH-0000388006	2	LGH MissingChrt	t	02-Nov-2017
Discharged: 71-May-2017	Calcon-0000300007	3	SGH Historical		31-Mar-2017
Discharged: 05-Dec-2016	LGH-0000388008	4	LGH PrimaruStor	ane	16-Feb-2017
Discharged: 02-Nov-2016	Coll GH-0000388099	Quick Update: Selected Cl	narts' Location		02-Nov-2017
Discharged: 02-Nov-2016	눱 LGH-0000388012	Ouick Create: LGH Vol 15	In LGH PrimaryStorage		16-Feb-2017
Discharged: 14-Nov-2016	👛 LGH-0000388013		in contraining storage		29-Mar-2017
Discharged: 21-May-2017	눱 LGH-0000390005	Create New Media			04-Apr-2017
Discharged: 21-May-2017	👛 LGH-0000398005	Purge Volumes			02-Nov-2017
Discharged: 21-May-2017	눱 LGH-0000398006	Chart/Visit Association			02-Nov-2017
Discharged: 31-Aug-2017	🗀 LGH-0000400033 🛛 🥒				04-Apr-2017
Discharged: 31-Aug-2017	🚊 LGH-0000400056	Print Chart List.			02-Nov-2017
Discharged:	🗋 🗀 LGH-0000408005	Print Labels		This Vis	sit's Charts
LGH-0000388005	🗌 🗀 LGH-0000414006 🔪			Selecte	d Charts
LGH-0000388006	🗋 LGH-LOCK-00004	Holdsm		Selecte	u Charts
	🗀 LGH-LOCK-00004	Notes		All Pati	ent's Charts
Currooocsee008	🗀 LGH-LOCK-00004	View Chart's History		New Vo	olumes
LGH-0000388012	GH-LOCK-00004	view Chart's History			26-Apr-2017

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

 ProFile: Tracking Task Application View Help Task Application View Help 	p] 🖳 🗙	- 🖴 💩 🖑 🗊	Dist. datas	20.0 1071 0 0			Trac	king ID:
Patient: USTPHODHIM, SALL Status: Patient type:	FI	nn: 700000373 N number: tend phys:	Admit date: Admit date: Facility:	20-Sep-1951 Sex: F Discha	remate SSN: irge date:			Ð
Charts : CSTPRODHIM, SALLY		Information for 'LGH-0000388005'						
Patient: CSTPRODHIM, S/	ALLY 🔺	Chart	Volume	Location	Movement Date	Admit Date	Discharge Date	Patient Type
Discharget 3/14/2017 Discharget 5/10/2017 Discharget 5/10/2017 Discharget 12/5/2016 Discharget 12/5/2016 Discharget 11/4/2016 Discharget 11/14/2016 Discharget 5/21/2017 Discharget 5/21/2017 Discharget 5/21/2017 Discharget 8/31/2017 Discharget 1/00006800 LGH-000068800 Discharget 9/2000	E uick Upd Uick C	LGH-0000388005	1 re Centre	LGH Surgical Daycare Centre	6/8/2017			
Ready. Pu	reate ivev urge Volu	imes						PRODBC SPOON 3:02 PM
Ci Pr Pr	hart/Visit rint Chart rint Label	: Association t List Is		•				
Hi Ni Vi	olds otes iew Charl	t's History		<u>، ا</u>				

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.

🔁 Update A Charts Location		X
Selected chart(s) are listed. Only chart(s) with a check mark ca	n be moved:
Chart	Volume	Current Location
✓ LGH-0000422005	1	LGH PrimaryStorage
Location view:		
	-	
LGH External HIM		
SGH External HIM SGH Internal HIM		
Default view		OK Cancel
Loading Location Views'		li.

3 In the lower pane, scroll through the list and select the appropriate location. Click **OK**.

🔁 Update A Charts Location		- • •
Selected chart(s) are listed. Only cha	rt(s) with a check mark	can be moved:
Chart	Volume	Current Location
🖌 LGH-0000388005	1	LGH Surgical Daycare Centre
•	III	4
Location view:		
LGH Internal HIM	-	
Select a location and click the OK bu	tton below:	
LGH HOLDING LGH Mgr/CoordRM LGH Mgr/CoordRM LGH MissingChrt LGH OffsiteStorage LGH Pre File		
LGH PrimaryStorage		
LGH Research	>	E
LGH SecondaryStorage		-
Default view		OK Cancel
Loading Location Views'		1.

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

() ProFile: Tracking Task Application View Help					
Patient: CSTPRODHIM, SALLY Status: Patient type:	X An and the second s	Birth date: 20-Sep-1951 Admit date: Facility:	Sex: Female Discharge date:	SSN:	Tracking ID:
Charts: CSTPRODHIM, SALLY Palient: CSTPRODHIM, SALLY Discharged: 7/11/2017 Discharged: 7/11/2017 Discharged: 5/10/2017 Discharged: 5/10/2017 Discharged: 12/5/2016 Discharged: 11/2/2016 Discharged: 11/1/2016 Discharged: 11/1/2016 Discharged: 11/1/2016 Discharged: 11/1/2016 Discharged: 11/1/2016 Discharged: 11/1/2016 Discharged: 11/1/2017 Discharged: 1	Information for 'L.GH-000038800 Chat Vok Chat Vok Chat 1 Chat 1 C	IGH Research 1	vement Date Admit Date	Discharge Date	Patient Type

Activity 2.8 – Move Charts in Batches

1 Click on Chart Location Batch Update



() ProFile:	Tracking				
Task Ap	plica View	Help			
ia 🖪	* 1 * *	👜 🖺 🗙	- 8 8	- 1	
Patient:	Chart Location Ba	tch	MBN:		Birth date:

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

ProFile: Tracking Task Application View Help			
🍬 🖀 🖬 × 🗞			
* Facility Select		Batch Chart Location Update M	ode
LGH Lions Gate Hospital LGH Medical Imaging LGH Neuro Rehab Outpatient Clinic LGH North Shore Hospice LGH OCC Medical Daycare LGH OCC Universal Clinic LGH Pediatric Asthma Clinic	^	Chart	Patient

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

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

	ProFile: Tracking						3
	Task Application View Help						
	🗽 🖀 🖬 × 🥐 🆏					Tracking ID:	•]
	* Facility Select	Batch Chart Locatio	n Update Mode				
X	* Chart Locations (by view)	Chart	Patient	SSN	MBN	Previous Location	
		1					
	LGH Internal HIM LGH External HIM						-
	SGH Internal HIM SGH External HIM						_
		1					
							-
							-
							_
	Default view	•					

4 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.

1 ProFile: Tracking					- • •
Task Application View Help					
🛝 🖀 🖬 × 🥐 🖏					Tracking ID: 👻
* Facility Select	Batch Chart Location	on Update Mode			
LGH Lions Gate Hospital 🗸 🗸]				
* Chart Locations (by view)	Chart	Patient	SSN	MBN	Previous Location
LGH External HIM 🔹]				
LGH Rehab Speech Languz LGH Respiratory Education f LGH Restoratory Education f LGH Restoration LGH Risk Mgmt LGH Special Care Nursery					
LGH Trauma Clinic LGH Trauma Clinic LGH Vascular Access Clinic LGH Vourd Ostomy Nurse (LGH Vourd and Family 15th : LGH North Store Horsine					
Default view	•				Þ

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



(1) ProFile: Tracking					
Task Application View Help					
🍬 🔁 🖬 × 👘 🚱					Tracking ID: LGH-0000398007 -
* Facility Select	Batch Chart Location Upd	late: Check-in Mode			
LGH Lions Gate Hospital 🗸 🗸]				
* Chart Locations (by view)	Chart	Patient	SSN	MRN	Previous Location
LGH External HIM 🔹	🛍 LGH-0000392005	CSTPRODHIM, SALLYDEMO		700000378	LGH PrimaryStorage
LGH Rapid Access Spinal CI LGH Registration LGH Rehab Outpatient LGH Rehab Outpatient LGH Rehab Outpatient LGH Respiratory Education F LGH Respiratory Education F LGH Restoration LGH Special Care Nursery LGH Trauma Clinic TT					
Default view	•		111		•

7 Click Save.

(1) ProFile: Tracking					
Task Application View Help					
ia 🖫 🖌 🖱 🕅					Tracking ID: LGH-0000398007 🗸
* Facility Select	Batch Chart Location Updat	e: Check-in Mode			
LGH Lions Gate Hospital 👻					
* Chart Locations (by view)	Chart	Patient	SSN	MRN	Previous Location
LGH External HIM 🔹	👛 LGH-0000392005	CSTPRODHIM, SALLYDEMO		700000378	LGH PrimaryStorage
LGH Rapid Access Spinal CI LGH Registration LGH Registration LGH Rehab Outpatient LGH Rehab Outpatient LGH Respiratory Education f LGH Respiratory Education f					
Default view	•				4

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.

() ProFile: Tracking					
Task Application View Help				Teerli	
				Паскі	
LGH Liops Gate Hospital	Batch Chart Location Opdate:	Check-in Mode			
* Chart Locations (by view)	Chart	Patient	SSN	MBN	Previous Location
▼					
Default view	•				•

Activity 2.9 – Add / View / Delete Notes

1

3

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**.

ProFile: Tracking Task Application View Help				
🐂 🖪 🖀 🎦 🐏 🕮 🔍 × 🖴 💩 🔿 😥			Tracking ID:	
Patient: CSTPRODHIM, CHERRY MRN: 700002849 Status: FIN number: Patient type: Attend phys:	Birth date: 03-May-1966 Admit date: Facility:	Sex: Female SSN: Discharge date:		
Charts : CSTPRODHIM, CHERRY Contents for CSTPRODHIM, CHERRY	łY			
Parent, CSTPRIDDHM, CHERRATE Discharged, 030-02:017 Discharged, 03	tion LGH Pimay LGH Pimay Patient Visit	Movement Date torage 16-Feb-2018 itorage 16-Feb-2018	Admit Date	Discharge Date
Ready.			PROD	BC SPOON 11:10 //

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.

D Note View Form		
Notes for CSTPRODHIM, SALLYDE	MQ	
SSN:	Contents: The Surgical Daycare encounter is missing for November 12, 2017.]	
Permanent note		 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

24



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

D Note View Form	
-14 🔲 🗙 🗐	
Notes for CSTPRODHIM, SALLYDEMO SYN: 2 44Nov-2016 - 14:20 2 03Nov-2017 - 13:34	Contents: The Surgical Daycare encounter is missing for November 12, 2017.]
Permanent note Print on deficiency slip Author: SPOON	

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

D Note View Form	
-HA 🔚 🗙 🗐	\cup
Notes for CSTPRODHIM, SALLYDEMO	
SSN:	Contents:
24-Nov-2016 - 14:20	The Surgical Daycare encounter is missing for November 12, 2017.
Permanent note	
Print on deficiency alig	
- Find on denciency stip	
Author: SPUUN	

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.

(1) ProFile: Tracking						- • •
Task Application View Help						
						\sim
Patient: CSTPRODHIM, SALLYDEMO Status: FI Patient lype: Al	I MRN: 700000378 N number: itend phys:	Birth date: 20-Sep-1 Admit date: Facility:	951 Sex: Female Discharge date:	SSN:		
Charts : CSTPRODHIM, SALLYDEMO	Contents for CSTPRODHIM, SALL	YDEMO				
Patient: CSTPRODHIM, SALLYDEN Discharged 83 Oct 2017	Chart	Volume	Location	Movement Date	Admit Date	Discharge Date
Discharged: 02-00t-2017	😂 LGH-0000392005	1	LGH PrimaryStorage	10-Feb-2017		
Discharged: 02-0012011	🛅 SGH-0000408015	1	SGH Historical	11-Jul-2017		
Discharged: 14-May-2017	🖆 SGH-0000408016	2	SGH Historical	11-Jul-2017		

To View a Patient Note

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

🕞 Note View Form - VIEW ONLY	
Notes for CSTPRODHIM, CHERRY	Contents:
6-Feb-2018 - 11:21 6-Feb-2018 - 11:22	The Surgical Daycare encounter is missing from November 12, 2017
Permanent note	
Author: Poon, Sylvia	

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**.

atient: CSTPRODHIM, CHERRY atus:	MRN: 700002849 FIN number:	Birth date: 03-May-1966 Admit date:	Sex: Female Discharge date:	SSN:	Tracking ID	
stient type: Charts : PSTEROOUNN, RUSPRY	Attend phys: Contents for CSTPRODHIM, CH	Facility: ERRY				
Charact CS1FR001MH, GEE General CS1FR001MH, GEE	Guick Update Selected Charts 1 Create New Media Purge Volumes Chart Visit Association Print Chart List Print Labels Notes Creat's History	ocation Loosh LGH F LGH F Pat	on irmanySitorage irmanySitorage	Movement Date	Admit Date	Discharge D

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.



1

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

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.



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

	ProFiles Task Ap	Tracking plication	View H	lelp		
	10. 🗖	ie 🖏	# E	80	1	As of
	Patient: Status: Patient ty	pe:		FI At	MRN: N numbe tend phy	r: s:
$\mathbf{\lambda}$	Chart Loo	ations			Inquire	e By Location Mode
	Chart Loc LGH Exter LGH Interr SGH Exter SGH Interr	ations nal HIM nal HIM nal HIM nal HIM			Inquire Crart	e By Location Mode

3 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

() ProFile: Tracking							
Task Application View	Help						
		- As of 14:31:30					Tracking ID:
Patient: Status:	MF FII	R: N number:	Birth date: Admit date:	Sex: Discharge date:	SSN:		
Patient type:	At	tend phys:	Facility:				
Chart Locations		Contents of 'LGH SecuredCha	rts' (6 charts)				
LGH Internal HIM	•	Chart	Volume	Patient	SSN	MBN	Movement Date
📋 LGH OffsiteStorag	A 9	눱 LGH-LOCK-0000408009	5	CSTPRODHIM, SALLY		700000379	30-Jun-2017
🛅 LGH Pre File		LGH-LOCK-0000404008	1	GREENE, ROBERT		110000108	31-May-2017
🛅 LGH PrimaryStora	ge	👛 LGH-0000404007	1	GREENE, ROBERT		110000108	31-May-2017
🛅 LGH QA		LGH-LOCK-0000404005	1	TESTING, SALLY		700000490	30-May-2017
LGH Reception		📛 LGH-0000398007	1	CSTPRODHIM, STEST		700002254	24-Mar-2017
LGH Record Com	pletion	LGH-0000388027	2	ZZTEST, CANDACE		700000010	20-Mar-2017
LuH Hesearch							
LGH Heviews							
LGH Secondari St	orage						
E GH SecuredChar	lage 🗍						
LGH-LOCK-000	0408000	1					
LIGHTLUCKTUU	J404008						
EGH-000040400	07 E						
LGH-LOCK-000	0404005						
EGH-000039800	07						
LGH-000038802	27						
LGH Supervisor R	M 🚽						
Default view							

print the list by clicking on the print icon





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 Click the HIM Patient Information Request icon Click the HIM Patient Information Request icon Click the HIM Patient Information Request icon 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).



In the **Requester** field, type the requesters name (last name, first name), then click the **Search**

button Selection window will pop-up. When you find the correct requester name, click on it to select it and click **OK**.

ProFile: Patient Information Request						
🖴 🗟 🍈 🏟 🎢 🕷 🗐 💯 🚟 Send Request	🗟, Modify Request 🛛 🛃 Get Request	Ø		🚨 Provider Selection		
Request number:	* Facilities:	LGH Pulmonary Function Lab	-	Last name: First na	me: Suffix	Cauch
Request date:	Requester:	ma	quire on requester	ma		- Jeach
Last updated by:	* Patient name:	ia,	Inquire on patient	Title: Alias:	Alias type:	New Provider
Date required: 03-Nov-2017 🍧 💌	* Requesting location:	Ð	Inquire on location	· · · · ·		Preview
Time required: 1753	Request status:	Logged - Request type:		Username:		Clear
Maintain request information	Rejected reasons:	Chart Unavailable to Provide Dupficate Request FIPPA Restriction	^^	Limit by group	No data filtering	1
Visit Lookup				Limit by organization	No data filtering	1
Tracking ID 💌				Limit by position	No data filtering	1
Patient	ådmit dato:	MRN-		Limit by relationship	🛛 💡 No data filtering	1
Patient type:	Discharge date:	Status:				
Birth date:	Sex:	SSN:		View physicians only	Sanúzaa Dovitir	Decominations
Admit Date Discharge Date	Patient Type Attending Physician Ch.	art Location FIN NBR		Machar, Atem Mackenzie, Paul MSP #=275 Macheni, Jamia Madhani, Jamia Madhani, Jamia Madhani, Sterbagia Machania, Sterbagia Machania, Sterbagia	59 Physic Physic Physic Physic DBC - Regist DBA I DBA I	ian - Gener EGH Evergreen F ian - Surgeon EGH Evergreen F ian - Gener EGH Evergreen F ian - Neurol EGH Evergreen F PharmNet EGH Evergreen F rabion - Sup EGH Evergreen F abor - Sup EGH Evergreen F
ady		Last request PRODBC SPOON 03-1	Nov-2017 17:56	Mainra, Raesh Rai MSP #-253 Mak, Bonnie Raw MSP #-091	20 Physic Physic 20 Physic	ian - Surgeon EGH Evergreen H ian - Gener EGH Evergreen H
				Maksuti, Genc Manchanda, Jully Manchulenko, Cin	DBA L Physic	an - Gener EGH Evergreen H Jre EGH Evergreen H ian - Oncol EGH Evergreen H ▼
						OK Cancel

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

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.

PHN:													
	VIP	Deceased	Alerts	BC PHN	MBN	Name		DOB	Age	Gende	Address	Address (2)	Dity
	2		Disease Alert	9878393786	700000378	CSTPRODHIN	I, SALLYDEMO	20-Sep-1951	66 Years	Female	123456 MAIN ST		VANCOU\
4:	Ø			9878393708	700000379	CSTPRODHIN	I, SALLY	20-Sep-1951	66 Years	Female	801 BROADWAY ST		/ANCOU\
Name:													
(PRODHIM													
Name:													
LY													
	-												
ler:													
al/Zip Code:	•												
Phone Number:	Facilit	y	Encounter #	Visit #	E	пс Туре	Med Service	Unit/Clir	ic R	oom B	ed Est Arrival Date	Reg Date	
	S LG	iH Cast Clinic	700000007	566 700000	0007600 Pr	e-Outpatient	Orthopedic Surg	ery LGH Ca	st Clinic		18-Jul-2017 8:30		
umter #-		àH Squamish	700000007	452 700000	0007486 Pr	e-Outpatient	Plastic Surgery	SGH PA	CU		12-Jul-2017 16:20		
		iH PF Lab	700000001	749 700000	0001750 Pr	e-Outpatient	Respirology	LGH PF	Lab		25-Nov-2016 10:00		
	- Starter LG	iH Cherno	700000003	3169 700000	0003185 Pr	e-Recurring	zzMedicine-Ger	eral LGH Ch	emo		20-Feb-2017 9:00		
+:		iH Lions Gat	e 7000000010	827 700000	0010889 Pr	e-Outpatient OB	Emergency	LGH 5E			25-Sep-2017 11:57		
1. 111701	SILG	iH PF Lab	700000002	2228 700000	0002229 Pr	e-Recurring	Respirology	LGH PF	Lab		07-Dec-2016 8:15		
rical MHN:		iH Squamish	700000000	384 700000	JUU/418 In	patient	General Surgery	SGH MS	1	11 U		11-Jul-2017 0	49
	5010	H Lions Gat	e 7000000003	515 700000	JUU3631 D.	ata storage	zzinternal Medic	Ine LGH SU	u c		01 E-k 0017 0.0E	14-Mat-2017 :	0.10
aarch Becet		UDE LISS	7000000002	2192 700000	002362 In 0002194 D.	patient	Description	LOH OC	0.	22 0	05.Dec.2017 0.25	05.Dag.2017	14-15
House I		HPELab	700000000	2184 700000	1002134 H	ecurring	Bespirology	LGH PE	Lab		07-Dec-2016 9:00	05-Dec-2016	11:05
		iH PE Lab	700000000	444 700000	001445	utnatient	Besnirology	L GH PE	Lab		02-Nov-2016 14:45	02-Nov-2016	11.43
	3 SG	aH Squamish	7000000001	429 700000	0001430 In	patient	zzinternal Media	ine SGH MS	i 1	06 0	2 14-Feb-2017 10:15	02-Nov-2016	8:49
	₹							-					,



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.

ProFile: Patient Information Request Task View Request Help			
🖴 🖳 🕘 🍬 🎢 🕷 🗐 🍺 🖷 Send Request	🖹 Modify Request 🛛 😰 Get Request	$\langle Q \rangle$	
Request number:	* Faciliti	ies: LGH Lions Gate Hospital	•
Request date:	Request	ter: Poon, Christina Irene	Inquire on requester
Last updated by:	* Patient nar	me:	Inquire on patient
Date required: 03-Nov-2017 🚔 💌	* Requesting locati	ion:	Inquire on location
Time required: 1740	Request stat	tus: Logged 👻 🔻 Request type:	•
Maintain request information	Rejected reaso	ns: Chart Unavailable to Provide Duplicate Request FIPPA Restriction	۸ ۲
Visit Lookup Tracking ID			
Patront	Admit date:	MRN:	
Patient type:	Discharge date:	Status:	
Birth date:	Sex:	55N:	
Admit Date Discharge Date	Patient Type Attending Physician	Chart Location FIN NBR	

The patient's record will display at the bottom.

Bith date: 20-Sep-1951 Sex: Female Source Admit Date Discharge Date Patient Type Attending Physician Chart Location FIN NBR ■ CSTPRODHIM ■ CSTPRODHIM ■ C1-May-2017 Pre-Recurring 7000000002228 21-May-2017 Pre-Outpatient 70000000001749 02-Nov-2016 02-Nov-2016 00-Uncatient 7000000001444	Patient: CSTP Patient type:	RODHIM, SALLY		Admit date: Discharge date:		MRN: Status:	700000379	
Admit Date Discharge Date Patient Type Attending Physician Chart Location FIN NBR Image: CSTPRODHIM Image: CSTPRODHIM Image: CSTPRODHIM Image: CSTPRODHIM Image: CSTPRODHIM Image: CSTPRODHIM Image: CSTPRODHIM Image: CS	Birth date: 20-	-Sep-1951		Sex: Female		331.		
21-May-2017 Pre-Recurring 700000002228 E 21-May-2017 Pre-Outpatient 7000000001749 21-May-2016 Outpatient 7000000001444		Admit Date	Discharge Date	Patient Type	Attending Physician	Chart Location	FIN NBR	^
		02-Nov-2016	21-May-2017 21-May-2017 02-Nov-2016	Pre-Recurring Pre-Outpatient Outpatient			7000000002228 7000000001749 7000000001444	E

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

Click OK to bypass.



					a h
5	In the Requesting location field,	click the Reg	juesting	Location	button 💵

Request number:	* Facilities: LGH Pulmonary Function Lab
Request date:	Requester: Mainra, Rajesh Rai 🔍 Inquire on requester
Last updated by:	* Patient name: CSTPRODHIM, SALLY Real Inquire on patient
Date required: 03-Nov-2017 🚔 💌	TRequesting location:
Time required: 1806	Request status.
Maintain request information	Rejected reasons: Chart Unavailable to Provide Duplicate Request FIPPA Restriction

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



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



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





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.

Send Request

10

11

Click the Send Request toolbar button

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

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.

à 🖩 🔮 🗖 🏹	* 1	1 (P	🚈 Send Request	🗟 Modify Reques	🗧 🚛 Get Request	60			
Reques	number:				* Faci	ities LGH Pulmona	ry Function	n Lab	
Req.	iest date:				Reque	ster. Mainta Baios	RN		Inquire on requi
Last up	dated by:				Patient n	ame:		1a	Inquire on pati
Date	required:	09-Nov-	2017 🚔 💌		* Requesting -	I GH Respirato	ry Educati	on Promus	Inquire on loca
Time	required:	0900			Request st	atus: Logged	Ŧ	* Request type:	Patient Care
V Ma	intain reg	uest inform	nation		Rejected rea:	ions: Chait Unav Duplicate F FIPPA Res	t <mark>ailable to</mark> Request triction	Provide	
isit Lookup Tracking ID 🔹									
Patient:				Admit date:		MBI	4:		
Patient type:				Discharge date:		Stat	us:		
Birth date:						SSN			
	Admit	Date	Discharge Date	Patient Type	Attending Physician	Chart Location	FIN NE	IR	

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.

	quest								
ask View Request Help									
2 🖲 🍈 🖍 🌴 🗖	🔃 🚈 Send Request	🗟 Modify Request	📳 Get Request	$\langle G \rangle$					
Request number: 27	71264946		* Facilities:	LGH Lions Gate H	lospital			-	
Request date: 19	9-Sep-2017, 14:58		Requester:	I			Inquire on req	uester	
Last updated by: Te	estUser, ManagerSuperviso	r-HIM	* Patient name:	CSTPRODHIM, S/	ALLYDEMO	ÝQ.	Inquire on pi	atient	
Date required: 15	9-Sep-2017 🚔 💌		* Requesting location:	LGH Emergency D	epartment	()	Inquire on loc	ation	
Time required: 14	444		Request status:	Logged	 Req 	uest type:	Patient Care	•	
🥅 Maintain request	t information		Rejected reasons:	Chart Unavaila Duplicate Requ FIPPA Restricti	ble to Provide Jest on			* *	
Visit Ebokop									
Patient: CSTPB0DHIM SA	ALLYDEMO	Admit date:		MBN- 3	70000378				
Patient: CSTPRODHIM, SA	ALLYDEMO	Admit date: Discharge date:		MRN: Status:	700000378				
Patient: CSTPRODHIM, SA Patient type: Birth date: 20-Sep-1951	ALLYDEMO	Admit date: Discharge date: Sex: Female		MRN: Status: Status: SSN:	700000378				
Patient: CSTPRODHIM, SA Patient type: Birth date: 20-Sep-1951	ALLYDEMO Date Discharge Date	Admit date: Discharge date: Sex: Female Patient Type	Attending Physician [C	MRN: Status: Status: SSN: Chart Location	700000378 FIN NBR				
Patient: CSTPRODHIM, SA Patient type: Birth date: 20-Sep-1951 Admit D CSTPRODHIM 09Jan:	ALLYDEMO Date Discharge Date 2017 18-Jan-2017	Admit date: Discharge date: Sex: Female Patient Type Inpatient	Attending Physician C	MRN: 3 Status: SSN: Chart Location	700000378 FIN NBR 70000000253	6			
Patient: CSTPRODHIM, SA Patient type: Birth date: 20.Sep-1951 Admit D CSTPRODHIM C 03Jan:	ALLYDEMO Discharge Date 2017 18-Jan-2017	Admit date: Discharge date: Sex: Female Patient Type Inpatient	Attending Physician [C TestPET, General	MRN: 3 Status: SSN: Chart Location	700000378 FIN NBR 70000000253	6			
Patient: CSTPRODHIM, SA Patient type: Birth date: 20-Sep-1951 Admit D CSTPRODHIM 09Jan: 200	NLLYDEMO Date Discharge Date 2017 18-Jan-2017	Admit date: Discharge date: Sex: Female Patient Type Inpatient	Attending Physician [C TestPET, General	MRN: : Status: SSN: Chart Location	700000378 FIN NBR 70000000253 PRODBC SP	6 00N 08-	Nov-2017 16	.57	
Patient: CSTPRODHIM, SA Patient: CSTPRODHIM, SA Patient lype: Birth date: 20-Sep-1951 Admit D CSTPRODHIM CSTPRODHIM OSJan:	ALLYDEMO	Admit date: Discharge date: Sex: Female Patient Type Inpatient	Attending Physician [C TestPET, General	MRN: : Status: SSN: Chart Location	700000378 FIN NBR 70000000253 PRODBC SP	6 00N 08-	Nov-2017 16	:57	

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 V 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.

	ProFile: Request Queue						×
	Task Edit View Queue Request Hel 	p /& 🛇 🗟	Find request:		Data curre	ent as of 17:10:29	
	۲						
	Request date: 16-Mar-2018 16:46	Rejected reasons:					
	Required date: 16-Mar-2018	Chart Unavailable to Pr	ovide	▲ Ⅲ			
	Required time: 9:00	 Invalid Authorization 					
	Days overdue: 0	Uther - Note		•			
	Request	Request Type ∠	Hold	Note	Requester	Requested By	Loc
1	 ☑ S 271529869 ☑ III.Jan-2018 	Patient Care 760000925 20Jan-2018	1977-Jan-22 Inpatient	Male Train, GeneralMedi	41 Years 7600000000925	Poon, Sylvia SSN:	LGH
	271561786	Patient Care				Poon, Sylvia	LGF
	🗎 😨 HIM-PatientOne, Stepher	760000925	1977Jan-22	Male	41 Years	SSN:	
	11-Jan-2018	<u>20-Jan-2018</u>	<u>Inpatient</u>	Train, GeneralMedi	<u>760000000925</u>		
						·	
	Ready	Request: 271561786, Patient:	: 1 Total request: 2 of 2	2, Patients: 2 TRAIN	I1 SPOON	16-Mar-2018 17:1	1 //

1

Search for Request Number by Requesting Location

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:	İ.	Inquire on patient
* Requesting location:	•	Inquire on location
Request status:	Lögged 🔷 👻 🔭 Request type:	
Rejected reasons:	Chart Unavailable to Provide Duplicate Request FIPPA Restriction	۸ ۳

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:	nguire on patient	
* Requesting location:	LGH 6 East Inquire on location	D
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.

	🗐 ProFile	e: Request Queu	e 		lala						
		😰 🔡 🔍		equest r	6 /6 🛇		Find request		Data cur	ent as of 17:10:29	
		Request date Required date Required time	< 16-Ma < 16-Ma < 9-00	ar-2018 16: ar-2018	46	Rejected reasons: Chart Unavailable to Pro Duplicate Request FIPPA Restriction	vide	* III			
		Days overdue	: 0			Invalid Authorization Other - Note		•	-		
(Request	271529869 HIM-PatientOne,	, Stephe	n		Request Type ∠ Patient Care 760000925 <u>20Jan-2018</u>	Hold 1977-Jan-22 Inpatient	Note Male <u>Train, GeneralMedi</u>	Requester 41 Years 7600000000925	Requested By Poon, Sylvia SSN:	Loc
ľ		HIM-PatientOne,	, Stephe			Patient Care 760000925 <u>20-Jan-2018</u>	1977-Jan-22 <u>Inpatient</u>	Male <u>Train, GeneralMedi</u>	41 Years <u>7600000000925</u>	SSN:	Luf
Γ	∢ Ready		III		🕵 Red	quest: 271561786, Patients:	1 Total request: 2 of	2, Patients: 2 TRAII	N1 SPOON	16-Mar-2018 17	• 7:11



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



- 3 Make the necessary changes (i.e. Date required, Requester, Requesting location, Request status, Rejected reasons).
- ⁴ Click the **Modify Request** loolbar button to save the changes.





1

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.

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.

Reporting Portal				
Reporting Portal	_	_	Welcome: Poo	on, Sylvia Settings Help
Reporting Portal		Q Search for Re	port Title	
Filters	All Reports (59) My Favo	orites (0)	1 2	3 > Last >> O
	Report Name	 Categories 	Source	♦ Favorite ♦
Source	Analysis Productivity Detail	HIM Productivity	Public	$\overrightarrow{\Sigma}$
Categories	Analysis Productivity Summary	/ HIM Productivity	Public	$\stackrel{\sim}{\sim}$
Pecent Peports	Ascent Module Access	HIM Document Imaging - Mgr/Supervisor	Public	T. E
RM-Daily Discharges	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	$\overrightarrow{\Sigma}$
	Daily Productivity	HIM Document Imaging - Mgr/Supervisor	Public	${\leftrightarrow}$
	Deficiency by Physician Detail (Cerner)	HIM Deficiency Mgmt	Public	\$
				PRODBC



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**.

8		Reporting Por	tal			
Reporting Portal						
⊖ Cerner				Wel	come: TestUser	, Clerk-HIM S
Reporting Portal			Q Search for Repo	rt Title		
Filters	All Reports (5)	My Favorite	5 (0)			
	Report Name	~	Categories	÷	Source	¢
Source	Chart Hold		HIM Chart Tracking/PIR		Public	
✓ Categories	Loan Charts Sum	mary	HIM Chart Tracking/PIR		Public	
HIM Chart Tracking/PIR (5/5)	RM-Daily Discharg	ges	HIM Chart Tracking/PIR		Public	
HIM Deficiency Mgmt - Clerk (0/7)	RM-Loaned Chart	: Detailed	HIM Chart Tracking/PIR		Public	
Recent Reports	RM-Patient Info R List	lequest (PIR) Pu	l HIM Chart Tracking/PIR		Public	

4 Your screen will look similar to this.

	Report	ing Portal		🔼	
Reporting Portal					
😂 Cerner			Welcome: TestUser, Cl	erk-HIM Settings Help	
Reporting Portal		Q Search for Report Title			
Filters	All Reports (5) My Favorites	; (0)		1 0	-
	Report Name 🔹	Categories \$	Source	🕈 Favorite 🕈	^
Source	Chart Hold	HIM Chart Tracking/PIR	Public	7/ 7	If you have reports that you run
▼ Categories	Loan Charts Summary	HIM Chart Tracking/PIR	Public	$\overleftarrow{\mathbf{x}}$	regularly, you can tag these as Favorites by clicking on the star a
HIM Chart Tracking/PIR (5/5)	RM-Daily Discharges	HIM Chart Tracking/PIR	Public	(☆)	
HIM Deficiency Mgmt - Clerk (I	Description: Suggested Report Passed User:	Reporting Application: CCL	Run Report		the far right of the report.
Recent Reports	resting: NU (replace with YES after Suggested Report completed) Frequency: Tested Br	Alternate Name: BC_ALL_HIM_DISCHARGE_LIST_LYT:DBA	Run Report in View Previ	Background ious Run	

5

Click on the Run Report button.

Run Report

6 The following dialog box will appear on your screen.

Qutput to File/Printer/MINE					
*Output Type	© Exportable(CSV)				
Health Organization	Vancouver Coastal Health Authority				
*Site					
Begin Discharge Date	06-Nov-2017				
End Discharge Date	06-Nov-2017				
Sort Order	Patient Name 🔹				
Page break on Unit					
	Execute Cancel				
Return to prompts on close of output					

- 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.

Begin Discharge Date	01-No	ov-201	7			_	6	-
End Discharge Date	01-No	ov-201	7					•
Sort Order	•			2017				
B 1 1 11 5	•		No	oveml	ber	+		
Page break on Unit	Su	Мо	Tu	₩e	Th	Fr	Sa	
	29	30	31	1	2	3	4	
	5	6	7	8	9	10	11	
	12	13	14	15	16	17	18	
	19	20	21	22	23	24	25	
Return to prompts on close of	26	27	28	29	30	1	2	
Beadu	3	4	5	6	- 7	8	9	

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

Sort Order	Patient Name 🔹
Page break on Unit	Patient Name Term Digit

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).



Reporting Portal										
eporting Portal RM-D	aily Discharges 🗙									
a 🎯 🗈 🗛 🗿 🗛	😼 🔿 🔿 🏕 🤇	🔍 🔍 150%	- -							
					BM Daily D	iacharges Ben	ort			
					Kivi-Daliy D	ischarges Rep	ion			
					Site:	Lions Gate Ho	spital			
Submitted E	3y: Poon, Sylvi	а			Date Range:	01-NOV-2017	10 01-NOV-2017			
Submitted 0	0n: 06-NOV-20	017 14:14	ŧ.							
					Encounter	Admit	Discharge	Attending	Longth	
Patient Name		HMRN	MRN	Encounter#	Туре	Date/Time	Date/Time	Physician	of Stay	Disposition
Unit	LGH 2 East									
CSTSITTHREE	BBROWN		700007796	700000012887	Inpatient	31-0 CT-2017 09:02	01-NOV-2017 09:08	Plievea Rocco MD	1	Transferred to a Non
SITTWOMARY	obitorini,		100001130	/0000001288/	Inpatient	51-001-2017 03:02	01-140 4-2017 03:00	The avea, receed, with		Acute Care Facility
		•••••								
Unit	LGH 3 West									
CSTMATTEST,	AMY		700006044	7000000009172	Inpatient	18-AUG-2017 15:24	01-NOV-2017 09:57	Plisvel, Antonio, MD	74	Discharged Home
										with Support Services
Unit	LGH 4 East									
CSTPRODREG	, JUSTINE		700002214	700000012850	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:

Reporting Portal R	M-Daily Discharges 🗙
🛃 🍜 🖪 🗛 🗿	🔒 🕒 🔿 🍣 🏄 🔍 🔍 175% 🔹 📲
 Savin 	ng the report 😼
Printi	ng the report 🚭
 Go to 	Page 🗟
 Previewski 	ous Page 실
 Next 	Page 🔒
 Zoom 	n In/Out 🔍 🥄 150% 🔽
■ Exit	*3

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

18

To print out the Daily discharge, click on the **Print** icon in the toolbar.

Name:	P27458 on spprt012.phsabc.eh	cnet.ca (froi 🔻 🛛 Properties
Status:	Ready	
Type:	Citrix Universal Printer	
Where:	CWBC - Shaughnessy Bldg 1st	Floor Health Records Room C133A
Comment:	Auto Created Client Printer PC04	5260 Print to file
Print range		Copies
o Al		Number of copies: 1
Pages	from: 1 to: 2	
Selection	n	12 ³ 12 ³ ^{Coll}
<u> </u>		
		OK Cance

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).

o	X
] 6	P 💌

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

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**.





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).

9_ Encounter Search		
BC PHN:	No persons found.	
MBN:		
Last Name:		
First Name:		
DOR		
N. 1997		
Gender:		
Postal/Zip Code:		
	No er counters found.	
Any Phone Number:		
Encounter #:		
Visit #:		
Historical MHIN:		
Search Reset		
		OK Cancel Pr

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.

S Encounter Search											×
BC PHN:	VIP Deceased A	Alerts BC PHN 9878393708	MRN 200000379	Name CSTPBODHIM SALLY	D0B /	Age 66 Years	Gender Female	Address 801 BBI	ΠΔΠΨΛ	Address (2)	
MBN: 700000379							1 onnaio	001 011	5115111		
Last Name:				List of I	patients						
First Name:											
Gender:											
Postal/Zip Code:	•			m							•
Any Phone Number:	Facility	Encounter #	Visit #	Enc Type	Med Service	Unit/	Clinic	Room	Bed	Est Arrival Date	Reg Date 🔶
	📲 SGH Squamish	700000007452	70000000748	6 Pre-Outpatient	Plastic Surgery	SGH	PACU			12-Jul-2017 16:20	
Encounter #:	S LGH PF Lab	700000001749	70000000175	0 Pre-Outpatient	Respirology	LGH	PF Lab			25-Nov-2016 10:00	
	LGH Chemo	700000003169	70000000318	5 Pre-Recurring	zzMedicine-Gener	al LGH	Chemo			20-Feb-2017 9:00	
Visit #:	SALLGH Lions Gate	700000010827	70000001088	9 Pre-Uutpatient UB	Emergency	LGH	5E			25-Sep-2017 11:57	
		7000000002228	70000000222	9 Pre-Recurring	Hespirology	LGH	PF Lab	444	01	07-Dec-2016 8:15	11.1.4.20
Historical MRN:	JUCH Liens Cate	700000007384	70000000741	B Inpatient	General Surgery	- LCH	MS SDCC	111	U		14 May 20 E
Thatolical Minte	GH Lions Gate	700000000000000	700000000000000000000000000000000000000	2 Innatient	Cardiologu	LGH	6F	622	01	21-Feb-2017 8-25	10-Jan-20
		7000000002348	70000000238	4 Becurring	Bespirology	LGH	PELab	022	01	05-Dec-2016 14:15	05-Dec-2
Search Reset	LGH PE Lab	700000002184	70000000218	5 Recurring	Respirology	LGH	PELab			07-Dec-2016 8:00	05-Dec-2
	JUGH PF Lab	700000001444							1	02-Nov-2016 14:45	02-Nov-2
	🕺 SGH Squamish	7000000001429	List d	of patients	encoun	ters	/visi	ts.	02	14-Feb-2017 10:15	02-Nov-2
	🗐 LGH Lions Gate	700000000465		•					03		22-Sep-21 🚽
	•		- <u> </u>	111					1		۱.
								ОК		Cancel	Preview

5 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.

IN:	VIP	Deceased	Alerts	BC PHN	MBN	Name	DOB	Age	Gender	Address		Address (2)	City
	Ø			9878393708	700000379	CSTPRODHIM, SALLY	20-Sep-1951	66 Years	Female	801 BR(DADW.	AY ST	VANCOUVE
00379													
ame:	-												
ame:													
	-												
××××													
er:	-												
/Zip Code:	•					III							
hone Number	Facili	ity	Enci	ounter #	Visit #	Enc Type	Med Service	Unit/	Clinic	Room	Bed	Est Arrival Date	Reg Date 1
	_ s ¶_s	GH Squamisł	7000	0000007452	700000000748	6 Pre-Outpatient	Plastic Surgery	SGH	PACU			12-Jul-2017 16:20	
ustor #:	ຟີ້ມ	GH PF Lab	7000	0000001749	700000000175	0 Pre-Outpatient	Respirology	LGH	PF Lab			25-Nov-2016 10:00	
antei #.	J. L	GH Chemo	7000	0000003169	70000000318	5 Pre-Recurring	zzMedicine-Gen	eral LGH	Chemo			20-Feb-2017 9:00	
	- 1 0	GH Lions Gal	e 7000	0000010827	700000001088	9 Pre-Outpatient OB	Emergencu	LGH	5E			25-Sep-2017 11:57	
		un PF Lab	7000	000002228	700000000222	9 Pre-Recurring	Respirology	LGH	PF Lab			07-Dec-2016 0.15	
	3.5	GH Squamisł	7000	000007384	70000000741	8 Inpatient	General Surgery	SGH	MS	111	01		11-Jul-201
cal MRN:	J.L	GH Lions Gal	e 7000	000003615	70000000363	1 Data Storage	zzInternal Medic	ine LGH	SDCC				14-May 20
	3 10	GH Lions Ga	e 7000	000002540	70000000050	2 Inpotiont	Cardiology	LCH	CE	022	01	21-Feb-2017 8:25	10-Jan-20
	1 🗐 Ս	GH PF Lab	7000	000002193	70000000219	14 Recurring	Respirology	LGH	PF Lab			05-Dec-2016 14:15	05-Dec-2
arch Reset	- - A LU	GH PF Lab	7000	000002184	70000000218	5 Recurring	Respirology	LGH	PF Lab			07-Dec-2016 8:00	05-Dec-2
	 u	GH PF Lab	7000	0000001444	70000000144	5 Outpatient	Respirology	LGH	PF Lab			02-Nov-2016 14:45	02-Nov-2
	_ ⊴¶ LS	GH Squamisł	7000	0000001429	70000000143	0 Inpatient	zzInternal Medic	ine SGH	MS	106	02	14-Feb-2017 10:15	02-Nov-2
	 u	GH Lions Gal	e 7000	000000465	700000000046	i4 Inpatient	zzInternal Medic	ine LGH	7W	707	03		22-Sep-21
	4												b.

6 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.

P Assign a Relationship	— ×
For Patient: CSTPRODHIM, SALLY	
Relationships:	
Data Management HIM Manager Supervisor Roomy Alleria stan Review	
	OK Cancel



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.



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.

CSTPRODHIM, SALLY 🛛					← List → 🌆 Recent + <mark>Name</mark> + Q
CSTPRODHIM, SALLY	DOB:20-Sep-1951	MRN:700000379	Code Status:	Process:	Location:SGH MS; 111; 01
	Age:66 years	Enc:700000007384		Disease:	Enc Type:Inpatient
Allergies: Demerol HCl, sulfa drugs	Gender:Female	PHN:9878393708	Dosing Wt:170 kg	Isolation:	Attending:

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.

(HIM-PatientOne, Javier	HIM-PatientOne, Myron 👔				← List → 🌾 Recent + 🛛 Name 🔹 🤉
	HIM-Patientone, Myron	DOB(1977-Jan-22	MRN:760000933	Code Status:	Process:Falls Risk	Location:LGH ED; ACWR
		Age:41 years	Enc:760000000935		Disease:	Enc Type:Emergency
	Allergies: Strawberries	Gender:Male	PHN:10760000933	Dosing Wt:75 kg, 75 kg, 75 kg, 75 kg	Isolation:	Attending:

? Take a look at your current screen:

What is your patient's age:_____

What is the encounter type: _____

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

? How long ago the information display was refreshed? _____

CSTPRODHIM, SALLY 🛛						List 🖉 Recent + Name + Q
CSTPRODHIM, SALLY	DOB:20-Sep-1951	MRN:700000379	Code Status:	Proc	ess:	Location:SGH MS; 111; 01
Allergies: Demerol HCI, sulfa drugs	Agexob years Gender:Female	Enc://0000000/384 PHN:9878393708	Dosing Wt:170 kg	Dise Isola	ase: tion:	Enc Typeunpatient Attending:
Menu 🕴 🌄 👘	Notes					[□] Full screen 🛛 👔 😧 20 minutes ago
		Loc Enc Atte	ation:SGH MS; Type:Inpatient :nding:	111; 01		
				[□] Full screen		₽ 18 minutes ago

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.

Task Edit View Patient Chart Links Index	Documents Help
🗄 🖃 Message Centre 🛔 Patient List 🌃 LearningLIVE	🗧 🕄 PACS 🔍 FormFast WFI 🖕
🔀 Tear Off 🕂 Exit 🚨 PM Conversation 👻 🕞 Comn	nunicate 👻 🗃 Discern Reporting Portal 💽 Documents 📋 Scheduling Appointment Book 📋 Medical Record Request 🖕



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.



11 <u>N</u>

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.

Notes	🕂 Add	🏦 👍 🖓 📜 🭳 🗶 🗟 🐑 🔷 🗃 🧔 🖤		
Orders	🖶 Add			
Results Review			: 14 ou	t of 17 documents are accessible. (All Documents: Selected Encounter Unly)
Documentation	🕂 Add	De Administrative	Result type:	Discharge Summary
Patient Information		🗁 🗁 I Have Been Scanned	Result date:	Monday, 02-October-2017 12:57 PDT
Medication List	🖶 Add	IIII Ob-Oct-2017 07:29 PDT Schneider, Maggie - "test"	Result title:	Discharge Summary
Cadina Clinical Summer			Performed by:	Schneider, Maggie on Monday, 02-October-2017 12:58 PDT
		02-Oct-2017 00:00 PDT Plisvcu, Jese, RM - "Anesthesia Record"	Encounter info:	Schneider, Maggie on Monday, 02-October-201/ 12:58 PD1 7000000011252. LGH Lions Gate. Inpatient. 02-Oct-2017 - 03-Oct-2017
Diagnoses and Problems		Consult Notes		
Allergies		E-Cardiology Consult		* Final Report *
Histories		21-Nov-2017 14:34 PST TestPET, Kesident, MD - "Consult Note"		•
		Discharge Documentation	Admitting Diagn	loses
Birth Certificate		🖶 🗁 Discharge Summary	test mls discharge	summary
Con-Connect		03-Oct-2017 10:50 PDT TestUser, Cardiologist-Physician, MD - "Discharge Summary	Chronic Problem	15 James
CareConnect		02-Oct-2017 12:57 PDT Schneider, Maggie - "Discharge Summary"	Historical	
Clinical Research		📂 Letters	No historical p	problems
ED Summary		Letter Administrative Closure Jo-Nov-2017 11:53 PST TestUser, Cardiologist-Physician, MD, - "Letter Admin Closure	Code Status	available
Form Browser		06-Oct-2017 08:45 PDT Schneider, Maggie	No qualitying data	avallable.
Immunizations		P Medical Assistance in Dying	Allergies	
MAP Summan		🗄 🗁 🧖 Medical Assistance in Dying	No active allergies	
MAR Summary		21-Nov-2017 09:20 PST Mohammad, Khaja Faisaluddin - "MAiD"	Medications	
		13-Jul-2017 14:02 PDT Scanned, Document - "BC Medical Assistance in Dying - Con 12, Jul 2017 14:02 PDT Scanned, Document - "Medical Assistance in Dying Record or	There are no Disch	harge Medications
		13-Jul-2017 14:02 PDT Scanned, Document - "VCH Medical Assistance in Dving Accord o		
		13-Jul-2017 14:02 PDT Scanned, Document - "BC Medical Assistance in Dying - Asse	Signature Line	
		🗁 Surgical Documentation		
		Construction Description	Electronically Sig	ned on 02-Oct-2017 12:58
			Schneider Maggi	A
		By type	Schneider, Maggi	6
		⊖ By status	Reviewed by: Plis	svca, Rocco, MD
		O By date	TestUse	r, Cardiologist-Physician, MD
		O Performed by		
		O By encounter		

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**.

P Clinical Notes - Document L	.ookup 💌
	ncounter
Filtered By	
🔘 Date Range	From: 11-Dec-2017
Document Count	To: 12-Dec-2017
Admission - Current	Number of Documents
 All Documents	Ŭ
	OK Cancel

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.

PRODHIM, SALI	LY 🗷												- List -> 🌯	Recent - Name
PRODHIM, SAL			DO8:20-Sep-1951 MR	N:700000379	Code Status:							Location:SG	H MS; 111; 01	
			Agex66 years Enc	700000007384				Disease:				Enc Type:Inp		
rgies: Demeroi HCI	, suita arug		Genderstemale PHI									Attending:		
		T Docum	entation										jus, rum sen	en Grun Ca
		💠 Add 🛛 🖹 Sign 🚛 🙈 F	orward 🔝 Provider Letter 🎬 Modify I	h 🕸 🌳 🎟 🕍 In Err	or Preview 🧠									
	+ Add	List												
		Display: All	• _											Previous Note 🐥 New
						_								
	4 444	Service Date/Time	Subject	Type		Result type	Discharge	Summary						
		03-Oct-2017 16-22-00 phr	Discharge Summary	Discharge Summary	y	esult date	 Tuesday, 0 Auth (Moril 	3-October-2017 16:22 Pl locf)	DT					
Clinical summary		20-Sep-201/11:56:46 PD1	Endoscopic Ketrograde Langiopanc El	CP Endoscopic Ketrogr	ade Cholangiopanc En P	Result title:	Discharge	Summary						
		12-Sep-2017 10:13:00 PDT	Admission Note Provider	Admission Note Pro	ovider	Performed	by: TestUser, I	Resident on Tuesday, 03-	October-2017 16:	23 PDT				
	+ Add	51-7659 2017 20 20 20 20	a design of the second s	Plistory and Physica		Verified by:	TestUser,	Resident on Tuesday, 03-	October-2017 16:	23 PDT				
		22-Aug-2017 130100 P	Admission H & P	Admission Note Pro	lvider	Encounter	info: 70000000	2546, LGH Lions Gate, In	npatient, 10-Jan-2	2017 - 10-May	-2017			
		10-Aug-2017 09:34300 P	Administration by R D	Adult Antivities of P	nic Nilo Living - Test					C 10				
		10-Adg-2017 124010 P	Admission Proc P	Administration black for	vally ching - rett				-	rinal ke	port *			
		14-30-2017 12:2500 PDT	I Mars Ress Connerd	Admission Note Pro	ovider									
vnect		11-Jul-2017 0049/00 PDT	Miston and Dissical	Mistory and Dispire		Discharge	Diagnoses							
		11-14-2017 00-40-00 PDT	Departure Make	Departure Mate Gang	n ala	Criesc pain								
		11-Jul-2017 00-49-00 PDT	Consultation Note	Consult Note Gener	de .	Dishetes	opiems							
		05-Jul-2017 14:44:47 PDT	Referral Message	Phone Message		Historical								
		06-Jul-2017 05:45:00 PDT		Coding Query		Tobacc	o use							
zations		14-Jun-2017 12:54:00 PDT	MLS Test	ED Note Provider		Code State	15							
		14-Jun-2017 06:18:00 PDT	Discharge Summary	Discharge Summan	4	No qualityin	ig data available.							
Documentation		13-Jun-2017 10:50:00 PDT	PLEASE RIGHT CLICK, MODIFY - Coding (Query Coding Query										
		13-Jun-2017 09:00:00 PDT	Cardiology Procedure TEST	Cardiology Procedu	are Note	Medicatio	ns							
		12-Jun-2017 12:53:00 PDT	Admission H & P	History and Physica	d .	Home Med	dications - Continue	Taking						
		10-Jun-2017 09:10:43 PDT	Admission Note Provider	Admission Note Pro	ovider	(Hotom)							N	
		24-May-2017 14:27:00 P	MLS Test	I Have Been Scanne	d	medicatic	on chan/caffaina/codaine	HO (TVLENOL #1 EOUTY 2.1)	w much How	whe	n Re	peeded for pain	Next Dose Addi	tional instructions
		21-May-2017 01:01:00 P	Abdominal Paracentesis	Abdominal Paracen	itesis	tab)	princing contenting concerns	Circentor Priceput in a	and by me	need	ed of	needed for point		
		21-May-2017 01:01:00 P	Consultation Note	Consult Note Gener	ric	HYDROmo	rphone (HYDROmorp	hone 1 mg oral tablet) 2 ti	iblet by mo	with every	6 hours			
		30-Apr-2017 00:00:00 PDT		AIMS - Text										
		27-Apr-2017 11:25:00 PDT		Operative Report		Action List	1							
		27-Apr-2017 09:30:00 PDT		Holter Monitor		Antion	Redenard R.	Destanced Data	Antine Status	Comment	Deres Deres and	Demonstrad D -	Descented Date	Research Comments
		19-Apr-2017 10:43:00 PDT	Discharge Summary	Discharge Summary	y	Accion	Performed By	Performed Date	Action Status	Comment	Proxy Personnel	nequested by	nequesced bate	nequest comment
		14-Mar-2017 14:18:00 PDT	Cardiac Catheterization diagnostic	Cardiac Catheteriza	tion Diagnostic	Perform	TestUser, Resident	US-Oct-2017 16:23 PDT	Completed					
		14-Mar-2017 14:18:00 PDT	Balloon Aprtic Valvuloplasty	Balloon Aortic Valve	uloplasty	sign	Testuser, Resident	03-Oct-2017 16:25 PDT	Compreted					
		14-Mar-2017 14:18:00 PDT	Admission Note Physician	Admission Note Pro	ovider	VERDEY	restuser, Kesident	uprocce2017 16:23 PD1	Completed					
		14-Mar-2017 13:47:00 PDT	Discharge Summary	Discharge Summan	Y									

The lower pane dispalys 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:	700000002546, 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.

List	
Display : Only	Author
Service Date/Time ∇	Author Contributor Sut Date
03-Oct-2017 16:22:00 PDT	Dis Encounter Type
26-Sep-2017 11:56:46 PDT	En Status nolar

To further filter your results, a third filter field is availble.

-	List			\searrow
	Display : Only	▼ Note Type ▼	ClinicalDoc	
	Service Date/Time	Subject	Administrative I Have Been Scanned	7
	03-Oct-2017 16:22:00 PDT	Discharge Summary	Admission Notes	
	26-Sep-2017 11:56:46 PDT	Endoscopic Retrograde Ch	Anesthesia Berger	
	12-Sep-2017 10:13:00 PDT	Admission Note Provider	Anesthesia Record	=

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.

List Display : All Service I All 03-May All	IV Physician Notes PowerNotes ission	Author Author Contributor Date Encounter T Note Type Status	уре			
List	- Autor - Ratura	Nandan	, 1			
Service Date/Time	Subject		Facility	Author: Contributor(s)	Status] I ∎
03-May-2015 09:20:00 P	Admission History and Physical	Admission Note Provider	LGH PF Lab	Satya, Nandan	Auth (Verified)	



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

List	
	•
Service Date/Time	Subject
03-Oct-2017 16:22:00 PDT	Discharge Summary

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.**

Advance	ed Filters
Fite:	Set As Default Shared
Select the Status you want to see	Select the Encounter Types you want to see
Active 2 Unknown Anticipated Transcribed (corrected) Acuth (Verified) REJECTED Canceled Dictated In Error In Lab In Progress Modified Superseded Transcribed Unauth	zilnstitution Case Management zzEmergency Room Physician Re Blood donation Skilled Nursing zzPsychiatric Trenegency Inbloo Message zzNewborn Home Health community health record zzTest Patient Observation zzInstacare zzInstitutional Doctor Observation zzInstacare zzSurgiconterl Phone Msg zzRekabilitation zzSurgiconterl Prone Msg zzRehabilitation zzInstructure Prone Msg zzRehabilitation zzInstructure Provate Duty zzShort Stay Observation zzlunk Account Prevalmit zzlenistration zzlenistration Recurring czcale Registration zzOutpatient Radiology Weit List zzSeries Outpatient zzloute Radiology
Select the Document Types you want to see	Select How Far Back to get Documents
□ ClinicalDoc	Select the Document author Select the Document contributor Restrict the Documents displayed by: Physician Notes Only
Filter selections for exact date range and encounter restriction will be applied to the current session only. They will not	be saved with a user-defined advanced filter.
Restrict the Documents displayed by the specified dates	Save Save As Apply New Remove Close

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

<	Service Date/Time 🔻
	03-Oct-2017 16:22:00 PDT
	26-Sep-2017 11:56:46 PDT
	12-Sep-2017 10:13:00 PDT
	31-Aug-2017 10:51:00 P
	22-Aug-2017 13:01:00 P
	22-Aug-2017 09:54:00 P
	10-Aug-2017 12:40:00 P
	14-Jul-2017 12:25:00 PDT
	11-Jul-2017 00:49:00 PDT
	11-Jul-2017 00:49:00 PDT
	11-Jul-2017 00:49:00 PDT
	11-Iul-2017 00-49-00 PDT

Results Review Tab

1

All results posted in PowerChart are in the Results Review.

Click on the **Results Review** tab. The review is organized into different tabs. Different users will have different tabs. Results Review Menu < Notes 船 🔯 Add Recent Results Lab - Recent Lab - Extended Pathology Microbiology Diagnostics Vitals - Recent Vitals - Extended **Results Review** Documentation - ... Level: Flowsheet: - O Table Group List Patient Information aturday. 04-Nove Medication List Add Coding Clinical Summary Navigator × Diagnoses and Problems 🕇 Add Allergies

- 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. Recent Results Lab - Recent Lab - Extended Pathology Microbiology Diagnostics Vitals - Recent Vitals - Extended Flowsheet: Lab View ▼ ... Level: Lab View Table Group C List -Navigator 19-Jan-2017 00:00 Lab View 23:59 PST 👿 Blood Gases Blood Gases 6.5 - 7.20 [2] pH Arterial pCO2 Arterial 12 - 25 [2] pO2 Arterial 10 - 40 [2]

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

 Recent Results
 Lab - Recent
 Lab - Extended
 Pathology
 Microbiology
 Diagnostics
 Vitals - Recent
 Vitals - Extended

Flowsheet: Lab View	▼ Leve	I: Lab View			
< >			Friday, 06-May-2016 00:00 PDT - W	ev esday, 06-December-2017 22:59 PST (Clinical Range)	4
Navigator	Lab View Blood Gases 19-Jan-2017 00:00 - 23:59 PST	pH Arterial 6.5 - 7.20 [2]		pC02 Arterial 12 - 25 [2].	p02 Arterial 10 -40 [2]

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

R	ecent Results	Lab -	Recent Lab	- Extended	Pathology	Microbiology	Diagnostics	Vitals - Recent	Vitals -	Extended	
	Flowsheet:	Lab View			▼ Le	vel:			🔿 Table	© Group	List
	• •								Friday, O	5-May-2016	00:00 PDT - We
	Event Date		Event	Result Ref. I	Range Status						
	19-Jan-2017 1	2:07 PST	pH Arterial	6.5							
			pCO2 Arteria	112							
			pO2 Arterial	10							
	19-Jan-2017 1	2:09 PST	pH Arterial	7.20							
			pCO2 Arteria	1 25							
			pO2 Arterial	40							



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.

Recent Results Lab - Recent	Lab - Extended Pathology Mi	ficrobiology Diagnostics Vitals - Recent Vitals - Extended	
Flowsheet: Diegnostics View	• _ Level	E Diagnostics View	
4.3		Tuesday, 06-November-2012 18:28 PST - Tuesday, 06-November-2018 18:28 P	ST (Clinical Range)
Navigator S Gastroenterology Procedure	Showing results from (02-Nov-	-2016 - 26-Sep-2017) Show more results	
Neurology Procedures	Gastroenterology Procedures	Colonoscopy	Endoscopic Retrograde Cholangiopanc ERCP
Other Specialty Procedures	26-Sep-2017 11:56 PDT		Endoscopic Retrograde Cholangiopanc ERCP
	24-Jan-2017 14:20 PST	In Error *	
	Neurology Procedures	Brainstem Electrical Response	
	24-Jan-2017 14:27 PST	Brainstem Electrical Response	
	02-Nov-2016 14:39 PDT	Anticipated	
	Other Specialty Procedures	Abdominal Paracentesis	
	21-May-2017 01:01 PDT	Abdominal Paracentesis	
	24-Jan-2017 14:27 PST	Abdominal Paracentesis	
	10-Jan-2017 10:13 PST	In Error, In Error	
	28-Dec-2016 10:51 PST	Abdominal Paracentesis (c)	

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

Recent Results Lab - R	ecent Lab - Extended P	athology Micro	biology Diagnostics	Vitals - Recent	Vitals - Extended		
Flowsheet: Diagnostics View Level: Table Group List							
••				Tues	sday, 06-November	-2012 18:28	
Showing results from (02-Nov-2016 - 26-Sep-2017) Show more results							
Event Date	Event		Result		Ref. Range Status		
02-Nov-2016 14:39 PDT	Brainstem Electrical Respon	se	Anticipated			1	
28-Dec-2016 10:51 PST	Abdominal Paracentesis		Abdominal Paracentesi	s (c)			
10-Jan-2017 10:13 PST	Abdominal Paracentesis		In Error				
	Abdominal Paracentesis		In Error				
24-Jan-2017 14:20 PST	Colonoscopy		In Error *				
24-Jan-2017 14:27 PST	Brainstem Electrical Respon	se	Brainstem Electrical Res	sponse			
	Abdominal Paracentesis		Abdominal Paracentesi	s			
21-May-2017 01:01 PDT	Abdominal Paracentesis		Abdominal Paracentesi	s			
26-Sep-2017 11:56 PDT	Endoscopic Retrograde Ch	plangiopanc ERCP	Endoscopic Retrograde	Cholangiopanc FR	CP	l .	

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.

	P Document Viewer + CSTPROPHING AND TO COMPANY									
_	비 🗉 🚳 는 🤉 🗶 🗟	[← + ⊕ ∅ ⊲	2 🖉 🎔							
	9_5_17 TEST CST TESTING ∲ ∲ ∳ NL F	99° 1) d 2 🔍 🔍 🛙	B- 3 C ≜ ≱ ୬ ୬	% ∰ ∏- ⊒ % ()∳	Page1					
	Patient Information	Flowsheet: Diagnostics Vi	iew 🔻 🗉	Level:	Table O Group	 List 				
	Medication List 🛛 🕂 Add	4 🕨			Tuesday, 06-November	-2012 18:28 PST - Tuesday, 06-				
	Coding Clinical Summary									
	Diagnoses and Problems	Showing results from (02-	-Nov-2016 - 26-Sep-2017)	how more results						
	Allergies 🕂 Add	Event Date Eve	ent	Result	Ref. Range Statu:					
	Histories	02-Nov-2016 14:39 PDT Bra	ainstem Electrical Response	Anticipated						
		10-Jan-2017 10:13 PST Ab	odominal Paracentesis	In Error						
		Ab	odominal Paracentesis	In Error						
	Birth Certificate	24-Jan-2017 14:20 PST Co	olonoscopy	In Error *						
	CareConnect	24-Jan-2017 14:27 PST Bra	ainstem Electrical Response	Brainstem Electrical Response						
	Clinical Research	21-May-2017 01:01 PDT Ab	dominal Paracentesis	Abdominal Paracentesis						
	ED Summary	26-Sep-2017 11:56 PDT En	doscopic Retrograde Cholang	iopanc ERCP Endoscopic Retrograde Cholang	iopanc ERCP	I				
	Form Browser									
		1.11								

Patient Information Tab

1 The Patient Information tab contains three useful tabs including:

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

Demographics	Visit List	Relationship Summary
--------------	------------	----------------------

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



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

mographics Visit List	Relationship Summary							
ncounter Type	location	Admit Date		Disch	arge Date	Encounter #	Medical Service	Reaton for Visit
patient	SGH MS 111 01	11-Jul-2017 00	49 PDT	11-Ju	1-2017 00:54 PDT	700000007384	General Surgery	demo
ata Storage	LGH SDCC	14-Mar-2017 05	1:59 PDT	14-M	ar-2017 23:59 PDT	700000003615	zzînternal Medicine	
patient	LGH 6E 622 01	10-Jan-2017 10	13 PST	10-14	ry-2017 09:19 PDT	700000002546	Cardiology	chest pain
eourring	LGH PF Lab	05-Dec-2016 14	115 PST	21-M	rr-2017 01:01 PDT	700000002193	Respirology	
ecurring	LGH PF Lab	05-Dec-2016 11	:05 PST	05-Di	c-2016 11:25 PST	700000002184	Respirology	ardf
utpatient	LGH PF Lab	02-Nev-2016 11	143 PDT	02-14	w-2016 11:45 PDT	700000001444	Respirology	shortness of breath
patient	5GH M5 105 02	02-New-2016 08	1.49 PDT	02-14	w-2016 11:04 PDT	700000001429	zzfriternal Medicine	shortness of breath
patient	LGH 7W 707 03	22-Sep-2016 10	14 PDT	14-14	w-2016 09:36 PST	700000000465	zzinternal Medicine	
e-Recurring	LGH PT LAb			21-M	re-2017 01:01 PDT	700000002228	Respiratogy	test
e-Recurring	LGH Cherro			21-M	re-2017 01:01 PDT	7000000003169	22Medicine-General	test
e-Outpatient	LGH PF Lab			21-M	11-2017 01:01 PDT	700000001749	Respirology	asdfasdf
e-Outnatiant	SGH PACU			31-As	ID-2017 10:52 PDT	700000007452	Plastic Surgery	demo
				21-84	0.2017 10.51 807	200000007566	Orthonedic Surgery	Surperv
e-Outpatient	LGH Catt Clinic							
e-Outpatient e-Outpatient OS	LGH Cast Clinic LGH SE				Y	70000001/08/27	Emergency	N/A
e-Outpatient 05 e-Outpatient 05 Encounter Infor Admit Date/Time :	LGH Cast Clinic LGH 52 mation 11-34-2017 00:49 PDT		Admit Source		Direct	700000810827	Emergency	N/A
e-Outpasient e-Outpasient OS Encounter Infor Admit Date/Time : Encounter Type :	LGH Cast Clinic LGH SE mation 11-Jul-2017 00:49 PDT Inpatient		Admit Source Medical Servi	e: koe:	Direct General Surgery	7000000000.08.27	Energeng	BUA .
e-Outpatient e-Outpatient OS Encounter Infor Admit Date/Time : Encounter Type : Reason for Visit :	LGH Cast Clinic LGH 5E mattion 11:34-2017 00:49 PDT Inpatient demo		Admit Source Medical Servi Isolation Cod	e: ice:	Direct General Surgery	700000010827	Integracy	NGA -
e-Outpatient e-Outpatient OS Encounter Infor Admit: Date/Time : Encounter Type : Reason for Visit : Accommodation :	LGH Cast Clinic LGH 58 11-34-2017 00:49 POT Inpatient demo Phrvate		Admit Source Medical Servi Isolation Cod Unit/Clinic :	e: koe: ke:	Drest General Surgery SGH MS	700000010827	Intergrees	N/A
Encounter Infor Admit Date/Time : Encounter Type : Reason for Visit : Accommodation : Room :	LOW Cast Clinic LOW 58 11-34-2017 00:49 PDT Inpatient demo Physike 111		Admit Source Medical Servi Isolation Cod Unit/Clinic : Bed :	e: ke:	Drect General Surgery 569:NS 01	7000000010827	Inegeoy	N/A
Encounter Infor Admit Date/Time : Encounter Type : Encounter Type : Reason for Visit : Accommodation : Relationships	LGH Cast Clinic LGH 54 11:34-2017 00:49 PDT Ingalant demo Physical 111 data Ingalant		Admit Source Medical Servi Isolation Cod Unit/Clinic : Bed : Health Pla	e : ke : n Inform	Drect General Surgery SCH NS 01 Dation		Integroy	NA .
Encounter Infor Admit Date/Time : Encounter Type : Reason for Visit : Accommodation : Room : Relationships Type NAI	LOP Call Cline LOP 12 Cline LOP 12 Cline 12 Sub-2017 Oct-19 POT Impattent Internet Private 111		Admit Source Medical Servi Isolation Cod Unit/Clinic : Bed : Health Pla Type	e : ke : n Inform PLANT	Direct General Surgery Sign NG 91 Sation NOUR NAME INOUR NAME		Integroy	104

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

		ampsonly Rearenes	and the second	a only								
Vame	Relationship	Status Begin Date Eni	d Date	Physician Serv	ice							
intra, rajiora, n												
isit Relationship	🖂 My Relation	iships Only 📝 Active Reli	ationship	as Only								
isit Relationship	My Relation	iships Only 📝 Active Rela Relationshin	ationship	as Only	End Date	Physician Se	nice Admit Da	te Discharge Date	Fin Number	Medical Service	Facility	Loration
isit Relationship elected Name Testilier	My Relation	ships Only Z Active Rela Relationship Consultion Provider	ationship Status Active	os Only Begin Date 25.5ep.2017	End Date	Physician Se	rvice Admit Da	te Discharge Date	Fin Number 700000010827	Medical Service	Facility LGH Lions Gate	Location
isit Relationship ielected Name TestUser, TestUser,	My Relation	ships Only I Active Reli Relationship Consulting Provider HML Coder	ationship Status Active	os Only Begin Date 25-Sep-2017 25-Sen-2017	End Date	e Physician Se	nice Admit Da	te Discharge Date	Fin Number 700000010827 700000010872	Medical Service Emergency	Facility LGH Lions Gate	Location LGH 5E
/isit Relationship Selected Name TestUser, TestUser,	My Relation MedicalStudent Coder-HMM ManagerSupersisor-HBM	iships Only @ Active Reli Relationship Consulting Provider HIM Coder	ationship Status Active Active	os Only Begin Date 25-Sep-2017 25-Sep-2017 02-Oct-2017	End Date	Physician Se	rvice Admit Da	te Discharge Date	Fin Number 700000010827 700000001827	Medical Service Emergency Emergency	Facility LGH Lions Gate LGH Lions Gate LGH Lions Gate	Location LGH 5E LGH 5E LGH 5E



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.

CSTPRODHIM, CSTPRODHIM, Allergies: Demerc	SALLY SALLY	js			DOB:20-Sep-1951 Age:66 years Gender:Female
Menu	4	<		- 🖌	Documentation
Notes		4	Add	Sian	A Forward Provider Letter Mod
Orders	📥 Add				



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**.

C PHN:	VIP	Deceased	Alerts	BC PHN	MRN	Name		DOB	Age	Gender	Addres	s	Address (2)	City
	12			9878216037	700001770	CSTPRODHIN	I, WILMADEMO	26-Jan-1984	33 Year	s Female	987 SI	DE STREET		VANC
RN:														
00001770														
ast Name:														
st Name:														
DB:														
NNN NNN														
ender:														
▼ ostal/Zip Code:	•													
	Eaci	litu	Enc	ounter #	√isit #	Enc Type	Med Service	Unit/Clini	c	Boom	Bed	Est Arrival Da	ate Ben Da	łe
y Phone Number:	-71	GH Lions Gate	700	000012223	70000001229	0 Outnatient	Geriatric Medicin	e IGHEnd	oscony	Procedure 1	01		18-0 ct-3	2017 10
	- Ai	GH PF Lab	7000	0000012214	700000001228	1 Outpatient	Respirology	LGH PF	ab	i iooodaio i			18-0ct-	2017 9:4
icounter #:	. ∭ .L	GH Lions Gate	7000	0000011217	700000001127	9 Inpatient	General Surgery	LGH 6W		607	03		02-0 ct-3	2017 9:1
	<u>Å</u>	GH Liens Cal	7000	000002713	700000000272	9 Inpatient	zzInternal Medici	ine LGH ECO	2	224	01		10 Jan 1	2017 12
it #:		GH Lions Gate	700	000002712	700000000272	8 Inpatient	Emergency	LGH AS0		ASC	02		19Jan-	2017 12
	. S¶E	GH Evergreen	700	000002711	200000000272	7 Inpatient	Residential	EGH ES:	3	E308	01		rovan.	2017 12
torical MRN:	- 	GH Evergreer	7000	000002710	700000000272	6 Inpatient	Residential	EGH ES:	2	E208	01		19-Jan-	2017 12
	- - 1 - 1 - E	GH Evergreer	7000	000002709	700000000272	5 Inpatient	Residential	EGH EN	2	E254	01		19Jan-	2017 11:
	- - 31 E	GH Evergreer	7000	000002708	700000000272	4 Inpatient	Residential	EGH EN	1	E152	04		19Jan-	2017 11:
Search Reset	<u> </u> <u>-</u>	.GH Lions Gate	e 7000	000002707	700000000272	3 Inpatient	Neonatology	LGH 4E		420	01		19Jan-	2017 11:
	⊴ ¶⊔	GH Lions Gate	7000	000002706	700000000272	2 Inpatient	zzENT	LGH 3PC)	306	02		19Jan-	2017 11:
	Na lin	.GH Lions Gate	e 7000	000002705	700000000272	1 Inpatient	Dermatology	LGH 2E		218	02		19-Jan-	2017 11:
	SIL	.GH Lions Gate	7000	000002627	700000000264	3 Inpatient	Gastroenterology	LGH 5E		518	01		13-Jan-	2017 15:
	•					111								



2 There are two options:

3

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.

CSTPRODHIM, WILMADEM	O DOB26-Jan-1984 M Age:33 years Er	RN:700001770 Code 5 hc:700000002712			Process: Location:LGH ASC; ASC; 02 Disease: Enc TypeInpatient	
Allergies: Allergies Not Recorded	Gender:Female PF	HN:9878216037 Dosing			Isolation: Attending:	
Menu	Contraction				C full x	én 🗊 Prin
	+ Add Sign J G Forward Provider Letter Modif	y Ba St W I Ban Error I Pr	eview 👒			
Orders 🕂 Add	list					
Results Review						
Documentation	Display: AI				*	Previous Not
Medication List Add	Service Date/Time T Subject	Type	Facility Author; Contrib	Paguit hope	History and Diversal	
	02-Oct-2017 09:25:00 PDT	History and Physical	LGH Lions Gate TestUser, Manag	Result date:	Thursday, 19-January-2017 14:54 PST	
	15-Sep-2017 12:07:00 PDT Discharge Summary	Discharge Summary	LGH Lions Gate TestHIM, Genera	Result status	Auth (Verified)	
	15-Aug-2017 11:49:00 P., Admission H & P	General Medicine Consult	LGH Lions Gate TestHIM, Genera	Result Mie: Redermed her	Tasti loss Diversitiat Ambelatory on Menday, 22 January 2017 14:55 DST	
Allergies + Add	18-Jul-2017 10:58:30 PD1 Fest Single Doc Scan Date	Cardiology Progress Note	LGH Lions Gate TestUser, Manag	Verified by:	TestUser, Physiatrist-Ambulatory on Monday, 23-January-2017 14:56 PST	
Histories	18-Jul-2017 USRSDU PUT (esting Single Doc Scan Date	Admission Note Provider	LUM LIONS Gate TestUser, Manag	Encounter info:	700000002712, LGH Lions Gate, Inpatient, 19-Jan-2017 - 19-Jan-2017	
	07-Jul-2017 10:37:00 PD1 Internal Medicine Consult	General Medicine Consult	LGH Lions Gate TestHIM, Genera		I Singl Depart I	
	24.May 2017 14:33:00 P	1 Have Reen Scanned	IGH Lions Gate Schneider Man		- Final Report	
Birth Certificate	24-May-2017 14:32:00 P.,, test	1 Have Been Scanned	LGH Lions Gate Schneider Mage	Performed be:Test	User, Ambulatory - Physiatrist on Monday, 2017-January-23 14:56 PST (Verified)	
	24-May-2017 14:32:00 P	1 Have Been Scanned	LGH Lions Gate Schneider, Mage	Test Saved decume	nt - In Progress	
Clinical Research	01-Feb-2017 13:00:00 PST HIM Test Discharge Summary	Discharge Summary	LGH Lions Gate TestAMB. Gener	0		
	26-Jan-2017 08:22:00 PST HIM Test Discharge Summary	Discharge Summary	LGH Lions Gate TestUser, Primar	Signature Line		
ED SUMMERY	25-Jan-2017 15:01:00 PST Discharge Summary	Discharge Summary	LGH Lions Gate TestAMB, Gener	Electronically Signed	I on 2017/01/23 14:56	
	24-Jan-2017 15:00:00 PST Admission H & P	History and Physical	LGH Lions Gate TestAMB, Gener	Test House Back June	Dispatial	
	19-Jan-2017 15:31:00 PST Cardiology Procedure	Cardiology Procedure Note	LGH Lions Gate TestHIM, Genera	rest user, Andulaic	ry - Physiatrist	
Infusion Documentation	19-Jan-2017 14:57:00 PST Anesthesia Final Record	Anesthesia Record	LGH Lions Gate TestUser, Physia			
MAR Summary	19-Jan-2017 14:54:00 PST Cardiac Catheterization diagnostic	Cardiac Catheterization Diagnostic	LGH Lions Gate TestUser, Physia			
	19-Jan-2017 14:54:00 PST History and Physical	History and Physical	LGH Lions Gate TestUser, Physia			
	19-Jan-2017 14-54-00 PST Progress Note Generic	Progress note denenc	LOH Lions Gate Testoser, Physia			
	10 Jan 2017 12:04:00 PST Cardiology Consummen	Cardiology Consult	LGH Lions Gate Core Desider A			
	19-Jan-2017 12-32-00 PST History and Physical	History and Physical	LGH Lions Gate TestHIM General			
	10 Jun 2017 13 23 00 DET Diversional Theorem Directory Minte	Physical Therapy Note	16H Lions Gate TestHIM Genera			
	12" John 2017 12 32 00 P 31 Principlat The boy Progress roote	THE PLAT THE DUTY THE D				

4 The Medical Record Request dialogue box will appear.

R Medical Record Request - CSTPRODHIM, SALLY - 700000379 - Discharge Summary	×
Template Document Template	Purpose Continuing Care 🔹
	Proper authorization received? Destination
Related Providers Sections	Requester
CLIN DOC - Admission Notes CLIN DOC - Admission Notes CLIN DOC - Advance Care Planning Documentation CLIN DOC - Aneathesia Records CLIN DOC - Aneathesia Records	A
CLIN DOC - Carology Procedures	Device Copies
Preview	Send

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.

Template	
Master ROI Template	-
Administrative Template (Internal)	
Document Template	
ED Transfer Template	
Inpatient/General Transfer Template	
Laboratory Template	
Master ROI Template	
Master Template with Confidential	
Medical Imaging Template	
NICU Transfer Template	
	Administrative Template Administrative Template (Internal) Document Template ED Transfer Template Inpatient/General Transfer Template Laboratory Template Master ROI Template Master Template with Confidential Medical Imaging Template NICU Transfer Template

Selecting an invalid template type will yield no printout.

'urpose	
Continuing Care	-
.egal Matter	
Patient/Personal	
Administrative Purpose	
Birth Reporting	
Cancer Registry Reporting	
Continuing Care	
Jrime Victims	
ducation Planning	
state/Wills	
D of Patient/Notification of Family	
nsurance Llaim	
nvestigation/inquiry	
aw Enforcement Investigation	
ALFD REVIEW	
viedical Examiner Case	
viental Health Deview	
Nerical Health Neview	
Traan Donation Services	
Ther	
Patient Transfer	
Juality/Chart Review	
Research/Clinical Trials	
Secure Records	
Statutory Requirement	
rauma Begistry Beporting	

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.



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

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 preview of the document. It is recommended to preview your document to ensure you have the correct patient and the correct information.



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 send 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.

Remote Report Distri	bution Selection	×
PHONE #	6046757226	OK
Transmit Date / T	ime Date:	Cancel
Non-Schedu	ed 08-Nov-2017 🚔 💌	
Scheduled	Time: 1404	



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.

1

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

BC PHN:	VIP	Deceased	Alerts	BC PHN	MRN	Name		DOB	Age	Gender	Addres	ss /	Address (2)	City
	2			9878216037	700001770	CSTPRODHIM	, WILMADEMO	26-Jan-1984	33 Years	Female	987 SI	DE STREET		VANC
MBN:														
700001770														
.ast Name:	-													
ïrst Name:														
DOB:	-													
NR_NNR_NNNR														
aender:														
♥ Postal/Zip Code:	•					m								
anu Phone Number	Facil	ity	Enc	ounter #	Visit #	Enc Type	Med Service	Unit/Clini	c F	Room	Bed	Est Arrival Dat	e Reg Da	.te
	- 1 L	GH Lions Gat	e 7000	0000012223	700000001229	0 Outpatient	Geriatric Medicin	ie LGH End	loscopy F	Procedure 1	01		18-0ct-2	2017 1
ncounter #:	3 L	GH PF Lab	7000	0000012214	700000001228	1 Outpatient	Respirology	LGH PF I	_ab				18-0ct-2	2017 9
	- 1 [L	GH Lions Gat	e 7000	0000011217	700000001127	9 Inpatient	General Surgery	LGH 6W	e	607	03		02-0 ct-2	2017 9
isit th		GULLIONS GOL	e 7000	000002713	700000000272	9 Inpatient	zzInternal Medic	ine LGH ECC	2	24	01		10 Jan (2017 -
ISR #.	-	GH Lions Gat	e 7000	000002712	700000000272	3 Inpatient	Emergency	LGH ASC	2 4	\SC	02		19-Jan-2	2017
		GH Evergree	n 7000	000002711	70000000272	- Inpoliant	Residential	ECH EC			01		19-Jan-2	2017
istorical MHN:	ᆀᄩ	GH Evergree	n 7000	000002710	700000000272	5 Inpatient	Residential	EGH ES2	2 E	208	01		19-Jan-2	2017
	3011	GH Evergree	n 7000	0000002709	700000000272	D Inpatient	Residential	EGH EN.	2 6	:254	01		19-Jan-2	2017
Search Beact	39116	CHI Evergree	n 7000	0000002708	700000000272	4 Inpatient	Nesidential	LOUAE		: 152	04		19-Jan-2	2017 1
Sealch	31	GH Lions Gat	e 7000	000002707	700000000272	3 Inpatient	INCONATOLOGY	LGH 4E	1 3	K2U X0C	02		19 Jan 2	2017
		GH Lions Gat	a 7000	000002706	700000000272	1 Inpatient	Dermatologu	LGH 2E	, .	218	02		19. Jan.'	2017
	3	GH Lions Gat	 7000 7000 	000002703	70000000272	3 Inpatient	Gastroenterology	LGH 5E	F	18	01		13. Jan. (2017
		an cions add	0 1000	000002021	100000000204	5 inpation	Gastrochterolog)	, Lange		//0	01		1500112	2011

accred for the nations and calest the appropriate appounter Oliale 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. 0





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.

CSTPRODHIM, WIL	MADEMO MADEMO		DOB:26-Jan-1984 M Age:33 years Er	RNe700001770 Code St c700000002712	atus:		P	rocess: Visease:	← List → Location:LGH ASC: ASC: 0. Enc Type:Inpatient	Recent - Name
Allergies: Allergies Not	t Recorded			IN:9878216037 Dosing					Attending:	
Menu	9	< > - ♠ Docum	entation							📾 Print 🕹 2 hor
Notes		And Mark III An	innuard 💷 Receider Letter 🗌 🛒 Mode	I De la Creation I De Creation	inu D.					
Orders	+ Add	The Bull State								
Results Review	-	List								
Decumentation		Dimler Al			1					Previous Note 3
Documentation		Districts - Tax	• Inc.							
Patient Information		Service Date/Time	Subject	Type	Facility	Author: Contrib	4			
Medication List	+ Add	02-Oct-2017 09:25:00 PDT		History and Physical	LGH Lions Gate	TestUser, Manad	Result type:	History and Physical		
Coding Clinical Summary		15-Sep-2017 12:07:00 PDT	Discharge Summary	Discharge Summary	LGH Lions Gate	TestHIM, Genera	Result status:	Auth (Verified)		
Diagnoses and Problems		15-Aug-2017 11:49:00 P	Admission H & P	General Medicine Consult	LGH Lions Gate	TestHIM, Genera	Result title:	History and Physical		
	.	18-Jul-2017 10:58:00 PDT	Test Single Doc Scan Date	Cardiology Progress Note	LGH Lions Gat	TestUser, Manag	Performed by:	TestUser, Physiatrist-Ambulatory on Monday, 23-January-2	017 14:56 PST	
Allergies	T A00	18-Jul-2017 09:45:00 PDT	Testing Single Doc Scan Date	Admission Note Provider	LGH Lions Gate	TestUser, Manag	Encounter info:	700000002712 LGH Lions Gate Innatient 19-Jan-2017 -	19-Jan-2017	
Histories		07-Jul-2017 10:37:00 PDT	Internal Medicine Consult	General Medicine Consult	LGH Lions Gate	TestHIM, Genera	Choose of the	reserves in the contract of the serves of th	10 Contraction	
		24-May-2017 14:37:00 P	test	Coding Query	LGH Lions Gate	TestAMB, Gener		* Final Report *		
Rith Certificate		24-May-2017 14:33:00 P		I Have Been Scanned	LGH Lions Gate	Schneider, Mage				
C		24-May-2017 14:32:00 P	test	I Have Been Scanned	LGH Lions Gate	Schneider, Magg	Performed by:Test U	ser, Ambulatory - Physiatrist on Monday, 2017-January-23	14:56 PST (Verified)	
CareConnect		24-May-2017 14:32:00 P		I Have Been Scanned	LGH Lions Gate	Schneider, Mage	rest daved document	- In Progress		
Clinical Research		01-Feb-2017 13:00:00 PST	HIM Test Discharge Summary	Discharge Summary	LGH Lions Gate	restAMB, Gener	Signature Line			
ED Summary		26-Jan-2017 08:22:00 PST	HIM Test Discharge Summary	Discharge Summary	LGH Lions Gate	estUser, Primar	Florensia alto Discord a	- 0017/04/03 44-55		
Form Browser		25-Jan-2017 15/01/0 PST	Discharge Summary	Discharge Summary	LGH Lions Gate	TestAMB, Gener	Electronically signed o	n 2017/01/23 14:56		
1		24-Jan-2017 15/00/00 PST	Admission Place	Pristory and Physical	LGH Lions Gate	Testamb, Gener	Test User, Ambulatory	- Physiatrist		
ammunizations		19-Jan-2017 13:51:50 PST 10-Jan-2017 14:57:00 PST	Cardiology Procedure	Cardiology Procedure Note	LGH Lions Gate	Testilizer Division				
Infusion Documentation		19-Jan-2017 14-54-00 PST	Cardiar Catheterization diagnostic	Cardiac Catheterization Disconnetic	LGH Lions Gate	Tatlicer Physic				
MAR Summary		19-Jan-2017 14:54:00 PST	History and Physical	History and Physical	LGH Lions Gate	TestUser Physic				
		19-Jan-2017 14:54:00 PST	Progress Note Generic	Progress Note Generic	LGH Lions Gate	TestUser, Physia				
		19-Jan-2017 14:54:00 PST	Cardiology Consultation	Cardiology Consult	LGH Lions Gate	TestUser, Physia				
		19-Jan-2017 13:04:00 PST	Bronchoscopy	Bronchoscopy	LGH Lions Gate	Core Provider, A				
		19-Jan-2017 12:32:00 PST	History and Physical	History and Physical	LGH Lions Gate	TestellM, Genera				
		19-Jan-2017 12:32:00 PST	Physical Therapy Progress Note	Physical Therapy Note	LGH Lions Gate	TestHIM, Genera				
		19-Jan-2017 12:32:00 PST	Physical Med and Rehab Progress No	te Physical Med and Rehab Progress Not	e LGH Lions Gate	TestHM, Genera				
		19-Jan-2017 12:32:00 PST	Discharge Summary	Discharge Summary	LGH Lions Gate	TestHIM, Genera				
		19-Jan-2017 12:07:00 PST	Outside Lab/Pathology	Outside Lab/Pathology	LGH Lions Gate					
		19-Jan-2017 12:07:00 PST	Discharge Summary	Discharge Summary	LGH Lions Gate	TestANB, Gener				
		19-Jan-2017 12:07:00 PST	Internal Medicine Consult	Internal Medicine Consult	LGH Lions Gate	TestHIN, Genera				
		19-Jan-2017 11:50:00 PST	Discharge Summary	Discharge Summary	LGH Lions Gate	TestHIM, Genera	1			
		13-Jan-2017 19:29:00 PST	Cardiac Catheterization diagnostic	Cardiac Catheterization Diagnostic	LGH Lions Gate	Plisvca, Locco, N	1			
		13-Jan-2017 15:39:00 PST	I Mave bleen Scanned	I Mave Been Scanned	LGH Lions Gate	Document, Scan	1			
		<								
		<< Previous Next>>								
						1				
						1				
						1				
						1				
								1		

4 The Medical Record Request dialogue box will appear.

3

All results	Template Master ROI Templ	ate	•	Purpose Continuing Care
Date Range From: xx,xxxx,xxxx To: xx,xxx,xxxx © Clinical Range Postu Polated Providers C + 1	A V A A A A A A A A A A A A A A A A A A			Proper authorization received? Destination Requester
Name	Relationship	Device		Comment
Plisvca, Rocco, MD	Attending Provider		-	
	Admitting Physician		=	
📃 Plisvca, Hocco, MD	Primory Core Physician			
Plisvca, Hocco, MD Plisvcn, Herb, MD	r filling cale r hysician			
Plisvca, Hocco, MD Plisvcn, Herb, MD Poon, Sylvia	HIM Manager Supervisor			
Plisvca, Hocco, MD Plisvcn, Herb, MD Poon, Sylvia Poon, Sylvia	HIM Manager Supervisor HIM Manager Supervisor		-	The Conies
Plisvca, Hocco, MD Plisvcn, Herb, MD Poon, Sylvia Poon, Sylvia One Sylvia One Sylvia	HIM Manager Supervisor HIM Manager Supervisor Device cro	oss referenced	Ŧ	Device Copies

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.

Event Status	
All results	•
Verified only	
Verified and Pending All results	

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.

Template	Template
Document Template	Master ROI Template
Administrative Template (Internal)	Administrative Template (Internal)
Document Template	Document Template
ED Transfer Template	ED Transfer Template
Inpatient/General Transfer Template	Inpatient/General Transfer Template
Laboratory Template	Laboratory Template
Master ROI Template	Master ROI Template
Master Template with Confidential	Master Template with Confidential
Medical Imaging Template	Medical Imaging Template
NICU Transfer Template	NICU Transfer Template

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.

– Date Range			
From:	**_***_***	× •	×
To:	**_***_***		
Clinical R	ange	🔘 Posting Range	

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.

Proper authorization received?

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

Destination	
HIM ROI	



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

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Requester	
]

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

Comment	
	~
	· · ·

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**.

Device	
	-
ManualFax	
590_1stfl_t1	
590_1stfl_t2	Ξ.

Medical Record Request

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

No Cancel

Yes

14 If you want to print the documents, click on the **Preview** button Preview 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.



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.

	Redical Record Request - CSTPRODHIM, WILMADEMO - 700001770 - History and Physical	
	Template Document Template	Purpose Continuing Care 🗸
Device	Related Providers Sections	Proper authorization received? Destination HIM ROI III Requester Comment
ManualEax	CLIN DOC - Advance Care Flaming Documentation CLIN DOC - Alexi Health Documentation LLIN DOC - Aneltheae Records CLIN DOC - Cardiology Procedures	
590_ <u>1stfl_t1</u> 590_1stfl_t2	Select al Clear al Proview	Device Copies ManualFax 1 :

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.

Remote Report Distrib	ution Selection	×
PHONE #	6046757226	OK
Transmit Date / Ti	me Date:	Cancel
Non-Schedule	ed 08-Nov-2017 📮 💌	
Scheduled	Time:	

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

🖹 Medical Record Request - CSTPRODHIM, WILMADEMO - 700001770			— ×-
Event Status	Template	Purpose	
Pair results Date Range From: xxx_xxxx_xxxxx I.o: xxx_xxxx_xxxxx		Proper authorization re	ceived?
Clinical Range Postii Related Providers Sections	ig Range	Requester	
CLIN DOC - Facesheets CLIN DOC - Discharge Docur CLIN DOC - Transfer Notes CLIN DOC - Emergency Docu	nentation		*
	Select all C	lear all Device	Copies
	Preview	Sen	d

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

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

vent Status	Template	Purpose
All results	Master HUI Template	Continuing Care
Date Range		
From: 02-Dec-2017 🚔	•	
To: 16-Dec-2017	-	Proper authorization received?
Clinical Panas O Posting P		Destination
Cirrical hange Tosung h	ange	HIM RUI
D. L. I.D. 11 Castiens		Requester
Helated Providers Sections		
CLIN DOC - Facesheets	A	Comment
CLIN DOC - Discharge Document	ation	^
CLIN DOC - Transfer Notes		
CLIN DOC - Emergency Documen	tation	
CLIN DOC - Admission Notes		
•		Device Coving
	Select all Clear all	
	Preview	Send

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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.

Redical Record Request - CSTPRODHIM, V	NILMADEMO - 700001770	•
Event Status All results	Template Master ROI Template -	Purpose Continuing Care 🗸
Date Range From: 02-Dec-2017 To: 16-Dec-2017		✓ Proper authorization received? Destination
Clinical Range Posting Range Related Providers Sections		HIM ROI
CLIN DOC - Facesheets CLIN DOC - Discharge Documentation CLIN DOC - Transfer Notes		Comment
CLIN DOC - Emergency Documentation		•
	Select all Clear all	Device Copies
	Preview	Send

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.

F	elated Providers Sections		
	Name	Relationship	Device
	🔲 Poon, Sylvia	HIM Manager Supervisor	
	📃 TestUser, Cardiologist-Physician, MD	Consulting Provider	
	📃 Train, Emergency-Physician8, MD	ED Provider	
	📃 Train, GeneralMedicine-Physician7, MD	Primary Care Physician	
	📃 Train, GeneralMedicine-Physician7, MD	Attending Provider	