WORKPACKAGE CST Transformational Learning N95

# Health Information Management: Clerk III



Last update 2018/03/12 (N95)

Health Information Management – Clerk III

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## **ACTIVITY 1 – Patient Information Request (PIR) Request Queue**

#### **Learning Objectives**

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

- Retrieve a PIR Request List by Location/Facility
- Create/Print a PIR Request Pull List using Discern Reporting Portal
- Change the Status of a Request

## Activity 1.1 – Retrieve a PIR Request List by Location/Facility



4 The Request Queue Search dialogue box will open.

V Facilities									
BCG Bella Coola ( BCG Medical Ima EGH Evergreen H HTH Hiltop Hous	ieneral Hospi jing ouse e	tal					* •	Se	elect
Request									
Request number									
View all requests									
Search Criteria									
Patient									ýq.
Tracking ID									
Reg. location									ø
Current location									<b>O</b>
Requester									
🕅 Request date	**,***,***	-	0000	-	To	**,×**,×***	-	0000	*
Required date	**,***,***	-	0000	· ·	To	**,***,****	-	0000	*
Status				Re	eques	t type			
Canceled Complete Logged Processing			• 111 •		Audit Comn Patier QA	nittee nt Care			*
					IK		Cancel	] [ ]	Reset

5 Under Facilities, select the main Facility (i.e. LGH or SGH).

By clicking on the **Select** button, all areas within **Facilities** will be checked. You will rarely want to do that, as all facilities across the three HO's (VPP) will eventually be listed.

<b>Å</b>	Request Queue Search			×
Facilities GLGH Laboratory GLGH Lions Gate Hospital GLGH Medical Imaging GLGH Neuro Rehab Outpatient Clinic		^ •	<u>S</u> elect	

Under Request, you can select by **Request number** (if you know it) or **View all requests** by clinic/area or facility.

- Request-

6

📃 Request number	
View all requests	

- 7 Under **Search Criteria**, you can select by:
  - Patient
  - o Tracking ID
  - Requesting location
  - Current location
  - o Requester
  - Request date/time range
  - Required date/time range
  - o Status
  - Request type

Search Criteria		
Patient		<u>i</u> a,
Tracking ID		
🔲 Req. location		0
Current location		<b>e</b>
Requester		
🔲 Request date	жж.жик.жик 💽 💌 0000 🚔 То ж.жик.жик 💽 💌 0000	×
Required date	жж.жжж.жжж 💌 🔽 0000 🚔 То ж.жжж.жжж 💌 💌 0000	×
Status	Request type	
Cancelled Complete Logged Processing	Aust     Committee     Paient Care     QA	•
	OK Cancel F	Reset

Typically, if you are creating a list of charts to pull, you may want to filter by the specific location(s) under **Facilities** and the **Request date** along with the **Status** of **Logged** and **Request type** of



Patient Care. Once you have completed the fields for your Request Queue Search, click OK.

For today's example, we'll run a list of charts required for March 5<sup>th</sup>, 2018 that were logged. Remember to enter the time as well from 0001H - 2359H.

Your screen should look like this:

<b>A</b>		Request Q	ueue Search			×
C Facilities □ LGH Joint Replace □ LGH Lab Northmo □ LGH Laboratory ♥ LGH Lions Gate H	ement Access Clinic J unt ospital	JRAC			•	<u>S</u> elect
Request-						
Request number						
View all requests						
Search Criteria						
Patient						Ý.
Tracking ID						
✓ Req. location	LGH Cast Clinic					<b>e</b>
Current location						<b>B</b>
Requester						9
Request date	**.***.***	✓ 0000	🗧 To	**_***_***	÷ v 00	00
Required date	10-Jan-2018 📫	✓ 0001	To	10-Jan-2018	÷ 🗸 23	59
Status  Cancelled  Complete  Villogged  Processing		~	Reque	st type t mittee ent Care		~
		(	<u>o</u> k	<u>C</u> an	icel	<u>R</u> eset

<sup>8</sup> You will get a listing of all the charts requested and your screen should look similar to this.

Teals Edit View Over	when the first form the second s										
Task Edit View Que	ask toit view Queue kequest Heip										
을 🗓 🚵 盟 🔍 🔒 🗊 손 🦄 🖉 🔘 🗐 🛞											
Request date	18-Feb-2018 17:56	Rejected reason	s:								
Required date	18-Feb-2018	Chart Unava	lable to Provide	^							
Required time	21:00	FIPPA Restri	stion								
		Invalid Authority	rization								
Days overdue	: 0	Uther - Note		×							
Request ∠	Request Type ∠	Hold	Note	Requester	Requested By	Location	Facility	Status	Request Date	Required Date/Time	
271285054	Patient Care				Poon, Sylvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	18-Feb-2018 17:56	18-Feb-2018 21:00	
🗷 🕵 271285057	Patient Care				Poon, Sylvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	18-Feb-2018 17:58	18-Feb-2018 17:57	
🔳 驞 271287019	Patient Care				Poon, Sylvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	18-Feb-2018 17:56	18-Feb-2018 21:00	
표 賭 271287021	Patient Care				Poon, Sylvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	18-Feb-2018 17:59	18-Feb-2018 17:57	

9 To see more patient details, you will need to expand all of the "+" to the left of the Request ID's. Your Screen should look similar to this.

ProFile: Request Queue							
Task Edit View Queue Request Help							
Hequest date: 31-Jan-2018 11:18 Hejected reasons:							
Required date: 05-Mar-2018							
Duplicate Request     EIPPA Restriction	=						
Hequired time: 9:00							
Days overdue: 0 Other - Note	-						
Request Request Type	Note Requester	Requested By	Location	Facility	Status	Request Date	Required Date/Time
271515778 Patient Care	Poon, Christina Ire	ne Poon, Sylvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	31 Jan-2018 11:03	05-Mar-2018 9:00
🗐 💇 HIM-PatientFive, Angelo 760001015 1969-Jan-24	Male 49 Years	SSN:					
L <sup></sup> <u>11 Jan-2018</u> <u>11 Jan-2018</u> <u>Outpatient</u>	Train, GeneralMedi 7600000001015						
E 271515782 Patient Care	Poon, Christina Ire	ne Poon, Sylvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	31 Jan 2018 11:10	05-Mar-2018 9:00
E MiM-Patient Three, Ronald 760000990 1969-Jan-24	Male 49 Years	SSN:					
□ <u>11Jan-2018</u> <u>11Jan-2018</u> <u>Uutpatient</u>	Train, GeneralMedi 7600000000990	D 01.				01.1 0010.11.14	05.14 0010 0.00
Section 24     Section 24     Section 24     Section 24     Section 24     Section 24	Male 49 Years	ne Poon, Sylvia	LGH Last Llinic	LGH Lions Gate Hospital	Logged	31-Jan-2018 11:14	05-Mar-2018 9:00
□ 11. Jan. 2019 11. Jan. 2019 Outpationt	Train GeneralMedi 760000000991	5514.					
	Poon Christina Ire	ne. Poon Sulvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	31. Jan. 2018 11:15	05.Mar.2018 9:00
Gene 760000992 1969-Jan-24	Male 49 Years	SSN:	Earr east clinic	Earr Elons date mospital	Logged	51001201011.15	0011101 2010 0.00
Light 11 Jan-2018 11 Jan-2018 Outpatient	Train. GeneralMedi 760000000992	0014.					
E S 271515791 Patient Care	Poon, Christina Ire	ne Poon, Sylvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	31 Jan-2018 11:17	05-Mar-2018 9:00
🗐 😨 HIM-PatientThree, Eddie 760000993 1969-Jan-24	Male 49 Years	SSN:					
C 11-Jan-2018 11-Jan-2018 Outpatient	Train, GeneralMedi 7600000000993						
Rev 271515794 Patient Care	Poon, Christina Ire	ne Poon, Sylvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	31 Jan-2018 11:17	05-Mar-2018 9:00
🖻 💇 HIM-PatientThree, Martin 760000994 1969-Jan-24	Male 49 Years	SSN:					
L 2018 11-Jan-2018 Outpatient	<u>Train, GeneralMedi</u> 760000000994						
E S 271515797 Patient Care	Poon, Christina Ire	ne Poon, Sylvia	LGH Cast Clinic	LGH Lions Gate Hospital	Logged	31 Jan-2018 11:18	05-Mar-2018 9:00
E MiM-Patient I hree, Vernon 760000995 1969-Jan-24	Male 49 Years	55N:					
- <u>✓ 11Jan-2018</u> <u>11Jan-2018</u> <u>Uutpatient</u>	Train, GeneralMedi 7600000000995						

You can sort in ascending/descending order by clicking on any of the headings.

10 It is recommended that you keep the Request Queue open if you can, as all the search settings and results remain unchanged. Once you close the application, the results may var as more requests can be added.

While you have the screen open, you can change the request status from Logged to Processing.

To change multiple requests, select the Change Batch Request icon 4.

🕘 ProFile: Request Queue								
Task	Edit	View	Queu	Je	Request	Help		
a 5		2 🔡	۹.		10 🗐	76/00		ی ک

#### 11 The Change Multiple Requests dialogue box will appear.

lequest	Request Type	Location	Status	Request status
271515794	Patient Care	LGH Cast Clinic	Logged	Cancelled
271515791	Patient Care	LGH Cast Clinic	Logged	
271515788	Patient Care	LGH Cast Clinic	Logged	Required date/time
271515785	Patient Care	LGH Cast Clinic	Logged	**_***
271515782	Patient Care	LGH Cast Clinic	Logged	
271515778	Patient Care	LGH Cast Clinic	Logged	

12 Highlight each request by pressing the shift key and clicking on the applicable requests.



lequest	Request Type	Location	Status	Request status
271515794	Patient Care	LGH Cast Clinic	Logged	Logged
271515791	Patient Care	LGH Cast Clinic	Logged	
271515788	Patient Care	LGH Cast Clinic	Logged	Required date/time
271515785	Patient Care	LGH Cast Clinic	Logged	**_***
271515782	Patient Care	LGH Cast Clinic	Logged	
271515778	Patient Care	LGH Cast Clinic	Logged	

13 Under Request status, select Processing.



14 Click the **Apply** button Apply. The requests from the list will update the status to the new status but will not disappear from the list. If possible keep the screen open and do not close it.

Note: You would not print your chart pull list from the Request Queue as there are **no historical MRN's** listed. You will need to print the pull list from Discern Reporting Portal.

## Activity 1.2 – Create/Print a PIR Pull List from Discern Reporting

To run a complete list for your facility for a specific date/date range, it is recommended that you use the

Click Run Report.

RM-Patient Info Request (PIR) Pull List. This report will list all charts in TD order by clinic/area.

This report can be run in a Printable PDF format or an Exportable (CSV) format.

If you require a list of charts for a specific clinic/area, run the report as a Printable PDF Format and print only the page(s) required.

From the Citrix StoreFront, click on the Discern Reporting Portal icon

2 From the Reporting Portal window, select RM-Patient Info Request (PIR) Pull List.

#### Reporting Portal 1 2 3 > Last > |0 All Reports (59) My Favorites (0) < First Filters ency by Phys Specialty RM-Deficie HIM Deficiency Mgmt Source Public Detailed Categorie RM-Deficiency by Phys Specialty HIM Deficiency Mgmt Public Summary Recent Reports RM-Loaned Chart Detailed HIM Chart Tracking/PIR Publi RM-Daily Discharge Loan Charts Summary Repo CCL Sugges User: Alternate Name: BC\_ALL\_HIM\_PIR\_PULL\_LIST 8f8-4245-984 PRO

3

1

The Discern Prompt dialogue box will appear.





4	4 Under Output to File/Printer/MINE, this defaults to <b>MINE</b> , which is a screen view.									
		* <u>O</u> utput to File/Printer/I	MINE		• 8					
5	Under (PDF).	Output Type, select ho	ow you want to view	the report – <b>Exporta</b> l	ble (CSV) or Printable					
	*Outpu	t Type	© Exportable(CSV)	Printable(PDF)						
			0 2440400000	0.1.1.1.1.1.1.1.1.1						
6	Select	the Health Organization	on, currently defaults	s to Vancouver Coas	stal Health Authority.					
	Health	Organization	Vancouver Coastal Health	Authority 👻						
_										
7	Under \$	Site, choose the appro	priate facility.							
	*Site		Bella Coola General Ho Lions Gate Hospital	spital	<u>^</u>					
			Pemberton Health Centr	e	_					
			RWL arge Memorial Ho	enital III						
		Noto: All clinics (or	reas are relled up to t	he main facility For	overale liene					
	1	Gate Hospite	al will include all clini	ics/areas within LGH,	Hope Center,					
	•	North Short	Hospice and Evergre	en House).						
8	Select t	the Start and End Date	e, using the down arr	ow keys to show the	calendar.					
	*Start	Date	23-Jan-2017							
	*End Da	ate	30-Jan-2017							
0										
9	Reque	ests dialogue box earlie ests dialogue box earlie	er, otherwise select I	<b>Logged</b> . The report i	is always defaulted to					
	*Char	t Status	Access Denied/Rej	ected						

Access Denied/Rejected
Cancelled
Complete
Logged
Processing

10 If you wish for a page break for each clinic/area, select the **Page Break on Requesting Location** 

#### box.

Page Break on Requesting Location 👘 📝

<sup>11</sup> If you want to return back to the same report parameters, after viewing/printing the report, you will

need to click on the **Return to prompts on close of output**. Click on the Door icon "Close" the report and bring you back to the prompt screen. Otherwise, when you close out the report, it will take you back to the main Discern Reporting Portal window.

Return to prompts on close of output

12 Click the Execute button Execute

The Printable (PDF) report should look similar to this.

0	Reporting Po							
Re	portine RM-Pa	itient Info Request (P	IR) Pull List 🗙					
G	ISA BA	🕒 🔿 🍣 🖉	🔍 🔍   150% 🔹 📢					
				RM-Patient Informa	tion Request (P	R) Pull List Report	t	
	Submitted B	v: Poon Sv	via	Facility:	Lions Gate	Hospital		
			00474500	Required D	ate Range: 23-JAN-201	7 to 30-JAN-2017		
	Shormered O	n: 14-NOV-	2017 15:39	Chart Statu	Is: Logged, Pro	ocessing		
	Historical MRN	Cerner MRN	Patient Name	Date of Birth	Requesting Location	Requestor Request ID	Cerner ID	Comments
	Historical MRN	Cerner MRN 700000379	Patient Name	Date of Birth 20-SEP-1951	Requesting Location	Requestor Request ID 271232955	Cerner ID	<b>Comments</b> sgdfgsdg
	Historical MRN	Cerner MRN 700000379 700000379	Patient Name CSTPRODHIM, SALLY CSTPRODHIM, SALLY	Date of Birth 20-SEP-1951 20-SEP-1951	Requesting Location EGH ES3 EGH ES3	Requestor           Request ID           271232955           271232957	Cerner ID	Comments sgafgsdg jhgjh

	Reporting											
Rer	onti	RM-Pati	ent Info Request (PIR) Pull List 🗙									
	🗃 💁	#A 🗊   🗟 🕻	è ●● ở ở ≙ ९ ९	- 📲								
	HMRN	MBN	PATIENT_NAME	DOB	REQUEST_LOCN	REQUESTER	STICKY_NOTE_TXT	CERNER_ID	LOC_SORT	TDO_SORT	MRN_SORT	REQUEST_NUMBER
1		700000379	CSTPRODHIM, SALLY	20-SEP-1951	EGH ES3		sgdfgsdg		EGH ES3		790370000	271232955
2		700000379	CSTPRODHIM, SALLY	20-SEP-1951	EGH ES3		jhgjh		EGH ES3		790370000	271232957
3		700000403	CSTPRODHIM, DRYRUN	20-SEP-1951	LGH 2E		Volume 3 - Dr. Plisvcb, Stuart		LGH 2E		030470000	271228611
4		700000403	CSTPRODHIM, DRYRUN	20-SEP-1951	LGH 2E		Volume 3 - Dr. Plisvcb, Stuart		LGH 2E		030470000	271228691
5		700000403	CSTPRODHIM, DRYRUN	20-SEP-1951	LGH 2E		Volume 3 - Dr. Plisvcb, Stuart		LGH 2E		030470000	271230571
6		700001770	CSTPRODHIM, WILMADEMO	26-JAN-1984	LGH 2E				LGH 2E		701770000	271232523
7		700000379	CSTPRODHIM, SALLY	20-SEP-1951	LGH 3PO		Alll volumes		LGH 3PO		790370000	271232795
8		700000379	CSTPRODHIM, SALLY	20-SEP-1951	LGH OffsiteStorage		sdfasdg		LGH OffsiteStorage		790370000	271232797
9		700000379	CSTPRODHIM, SALLY	20-SEP-1951	LGH PrimaryStorage		Alll volumes		LGH PrimaryStorage		790370000	271232799
10	)	700000379	CSTPRODHIM, SALLY	20-SEP-1951	LGH PrimaryStorage		Alll volumes		LGH PrimaryStorage		790370000	271232801
11		70000063	CSTPRODHIM, RULES INPA	29-JUN-1984	LGH RespEd Prog				LGH RespEd Prog		630070000	271232500
12	2	700000379	CSTPRODHIM, SALLY	20-SEP-1951	LGH RespEd Prog		Alll volumes		LGH RespEd Prog		790370000	271232511

The Exportable (CSV) report should look similar to this.

To print from the Printable (PDF) or Exportable (CSV) report, click on the print button  $\overset{13}{\checkmark}$ .



14 Click on the Door icon 10 to "Close" the report and bring you back to either the prompt screen or to the main Reporting Portal window.



Note: Use this PIR Pull List Report created from the Discern Report Portal to write any notations regarding exceptions (i.e. Charts not found). Once chart pull completed, place this report with the pile of charts to go to the requesting location.

## Activity 1.3 – Change the Status of a Request

Once the report has been printed/viewed and prior to pulling the charts, you should batch update all of the requests to the status of **"Processing"**. This is important for those sites who have multiple staff who pull charts for requesters, as this informs other users that you are working on these requests so that duplication of work is prevented.

Best practice is to leave the Request Queue application open to keep the search and results static to assist in updating the same set of results as a batch.

As the Request Queue displays the Request Number, and you have to expand each Request Number in order to see the patient chart details, it is recommended that you use the PIR Pull List to cross-reference the **Historical MRN** with the **Request ID**.

1 After you have pulled all the charts, go back to the Request Queue PIR list (if you've left it opened). From here, if there are any charts that are not available, click on the applicable Request ID that the patient's chart is not available for, then select the applicable reject reason under **Rejected reasons.** 

ProFile: Request Queue							
Task Edit View Queue Reque	t Help						
🛆 🗓 🔯 🔡 🔍 🔒 🗊 🤇	) % /6 🛇 🗟 🛛 🖲 🔳						
Request date: 31 Jan-201	8 11:03 Rejected reasons						
Required date: 05-Mar-201	8 Duplicate Reque	est					
Required time: 9:00	FIPPA Restrictio     Invalid Authoriza	n tion					
Days overdue: 9	Cther - Note	NOT .	- /				
Request Reques	:Type Hold	Note F	Requesta	Requested By	Location	Facility	Status ∇
E 271515779 Patient	Care		'oon, Christina	Poon, Sylvia	LGH Cast Clinic	LGH Lions Gat	Access Denied
🔍 🖻 😴 HIM-PatientFive 📿 7600010	)15 1969-Jan-24	Male 4	49 Years	SSN:			
🗄 🚺 271515782 Patien	Care	F	Poon, Christina	Poon, Sylvia	LGH Cast Clinic	LGH Lions Gat	Logged
🗄 🗄 271515785 👘 Patient	Care	F	Poon, Christina	Poon, Sylvia	LGH Cast Clinic	LGH Lions Gat	Logged
🗉 🔣 271515788 Patient	Care	_ F	Poon, Christina	Poon, Sylvia	LGH Cast Clinic	LGH Lions Gat	Logged

In keeping with the SOP, the only reject reasons we use are:

Rejected reasons:	Rejected reasons:
Chart Unavailable to Provide	<ul> <li>Other - Note</li> <li>✓ Patient Not Discharged</li> </ul>
FIPPA Restriction Invalid Authorization	✓ Patient Not Seen □ Pre-payment/Non-payment
✓ Other - Note	Record Destroyed

2 Once you have selected a reject reason, click on the **Save Request** icon.



ProFile: Request Queue Task Edit View Queue	Request Help		23	
		0 🖻 🧶 🔘	*	
Request date: 3 Required date: 0 Becuired time: 9	1.Jan-2018 11:20 9-Mar-2018	Rejected reasons: Chart Unavailab Duplicate Reque FIPPA Restrictio	le to Provide est n	
Days overdue: 9		Invalid Authoriza Other - Note	lition	<b>•</b>
Equest 271515778	Patient Care Patient Care	Hola	Note	Poon, Christina Poon, Christina

If you select **Other – Note**, you must add a note by clicking on the request and select **View/Add Note** icon to add comments as to why the requested chart is not available.

Remember that if you click **Permanent note**, it doesn't mean the note will stay permanent. It will only prompt someone who tries to delete that note, as to whether or not they want to delete the note. The Print on deficiency slip is dithered.

Once the Note has been completed, click Save and Exit.

	🗊 Note View Form 🗕 🗆 🗙
🚊 ProFile: Request Queue	Request - 271285054 Contents:
Task Edit View Queue Request Help	Chart is signed-out to ED.
≙ ಔ 🖀 🥾 🖬 🗊)⁰ ≫ ≫ ⊗ ಔ, 兽 🖲 🔮	
Request date: 31 Jan-2018 11:19 Rejected reasons:	
Required date: 09-Mar-2018	
Required time: 9:00	
Days overdue: 9	
Request Type Hold Note Requester	
🗄 😼 271515778 Patient Care Poon, Christina.	
■ S 271515782 Patient Care Poon, Christina.	
🗉 😼 271515788 Patient Care Poon, Christina.	
🗷 🔀 271515797 Patient Care Poon, Christina.	
The second secon	Permanent note
I S 271515806 Patient Lare Hunter, James ■ 271515809 Patient Care Hunter James	Print on deficiency slip
■ S 271515812 Patient Care Hunter, James	Author
Image: Second	Author

- **3** For all charts that are unavailable, continue with the above steps until you have identified all the unavailable charts.
- For the remaining charts that are available, you can change multiple requests by selecting the **Change Batch Request** icon  $\checkmark$ .



5 The Change Multiple Requests dialogue box will appear.

celled
lequired date/time
x_xxxx

6 Highlight each request by pressing the shift key and clicking on the applicable requests.

🔏 Change Multiple	Requests				
Request	Request Type	Location	Status	*	Request status
271228462	Patient Care	LGH NCU	Processing		Complete
271228460	Patient Care	LGH 6E	Processing		
271228454	Patient Care	LGH 2E	Processing		Required date/time
271228438	Patient Care	LGH PrimaryStorage	Processing		XX_XXX_XXXX A
271228421	Patient Care	LGH 2E	Processing		
271191822	Committee	LGH PACU 1	Processing		
271191818	Pulled	LGH ED	Processing		
8 271191814	Patient Care	LGH NCU	Processing		
8 271191801	Patient Care	LGH 3PO	Processing		
11188304 🔀	Patient Care	LGH Med Imaging	Processing		
•	III			•	Apply Close

7 Under Request status, select **Complete**.

Request status
Cancelled 🔹
Cancelled
Complete
Logged Processing
Access Denied/Rejected

8 Click the **Apply** button Apply. The requests from the list will update the status to the new status but will not disappear from the list. Click close **X** to exit.



## ACTIVITY 2 – Patient Lists

#### Learning Objectives

- At the end of this activity, you will be able to:
- Have an Overview of What Patient Lists are
- Build a Custom Patient List
- Add / Remove Patients from Patient Lists
- Modify / Delete Patient Lists
- Proxy a Patient List to Another User
- Print a Patient List

### **Overview**

For HIM, Patients Lists will be created in PowerChart by Clerk III's and Clerk IV – ROI staff to provide access to researchers and external ROI requesters to specific patient charts/encounters. By building a Custom Patient List and proxying access to external requesters, it limits their ability to do a broad search in Cerner PowerChart, which is in keeping with privacy laws.

There are ten different types of lists, some of which are populated automatically by the system, while the Custom list is built manually. For example, the computers located in the inpatient areas are defaulted to display the Patient List of the Location of the computer – computers in 3 East at LGH will display the LGH 3 East Location Patient List.

You can build multiple Patient Lists and have up to ten of those available as Active Patient Lists and displayed as tabs in the Patient List view.

### Activity 2.1 – Build a Custom Patient List

In PowerChart, click on the **Patient List** tab

<sup>2</sup> The Patient List window will display. Click the **List Maintenance** wrench icon <sup>*P*</sup>.



3 The Modify Patient Lists dialogue box opens. Available and Active Lists will display in the left and right pane respectively. Click **New** to create a new list.



4 The Patient List Type dialogue box opens and displays the Patients Lists that are available for you to create. Single-click on **Custom** and click **Next**.

Patient List Type	×
Select a patient list type:	
Assignment Assignment (Ancillary) Internet Medical Service Provider Group Query Relationship Scheduled	
Back New	Finish
Back	Finish

5 The Custom Patient List dialogue box opens.

The left pane displays filter options while the right pane narrows down the options for your lists.

For HIM, the use of these filters will be very minimal.

Click in the Enter a name for the list field and type in the name of your Custom Patient List.

Click **Finish** to complete the action.

Care Teams Locations Medical Services Encounter Types Relationships Admission Criteria Uscharged Criteria Use Best Encounter	Care Team #1 Care Team #2 ENT	
Enter a name for the list: (Limit Research 1 - Albert Einstein	ed to 50 characters)	

### Table of Standard Naming Convention:

External Requester	Standard Naming Convention	Example
Research	Research # - Principal Researcher's Name	Research 1 – Albert Einstein
ROI Requester	Requester's Organization – Requester's Name	MCFD – Katniss Everdeen



6 The Custom Patient List will now appear as an Available list in the left-hand pane.

To be able to view this list in PowerChart you will have to move it to the Active lists in the right pane.

- Single-click on the Custom Patient List in the Available lists pane

The Custom Patient List will now appear as an Active list and is available to view in PowerChart.

Click **OK** to close the box.



Your Custom Patient List will display in your Patient List window.



## Activity 2.2 – Add / Remove Patients from Patient Lists

## **Adding Patients**

In the Patient List window, select the appropriate Patient List by clicking on the tab.

	Patient List
	/> 🗗 >> 💐 🌴 🌴   🛷   🗉 💼 💼   🎟 🚮   🚨
	Research 1 - Albert Einstein MCFD - Katniss Everdeen
	🎦 🛕 Location Name MRN En ounter # Age DOB Admitted Admitting Physician Reason for Visit Primary Care Physician Visitor Status
0	Click on the <b>'Add Patient'</b> icon

3 The standard Patient Search window opens.

Search for the patient and select the appropriate encounter using any of the criteria displayed in the left-hand pane.

BC PHN:	VIP	Deceased	Alerts	BC PHN	MRN	Name		DOB	Age	Gender	Addre:	15	Address (2)	City
	2			9878216037	700001770	CSTPRODHIN	A, WILMADEMO	26-Jan-1984	33 Years	Female	987 SI	DE STREET		VANCO
IRN:														
00001770														
t Name:	<b>\</b>													
st Name:														
DB:														
рогровок														
ender:														
Postal/Zip Code:	•					m								•
			E.e.		vc.a #	Ene Tree	M-45-	11-3/05-			D - J	E at Animal Da	Bas Da	
none Number:	Facil		Enc	Juriter #		Encirype	Med St	Unit/Cim			Deu	ESCAIIVALDA	ite neg Da	
		pH Lions Gal	10 7000	0000012223	700000001229	U Uutpatient	Medicin	e LGHEN	IOSCODY P	rocedure	01		10/18/2	2017 10:0
unter #:		ari FF Lab	7000	000012214	700000001228	1 Outpatien	spirology	LOH PT	Lab	07	02		10/18/2	2017 3:43
	3	SH Lions Gal	a 700	000001217	7000000000272	9 Inpatient	aninternal Medici	De LGHEC		224	01		1/19/2	017 12 07
#:	7	3H Lione Gal	a 700	000002713	70000000272	S Inpatient	Emergencu	LGH ASI	- 1	.24 \SC	02		1/19/20	017 12:07
	AN F	GH Everatee	n 700	0000002711	700000000272	7 Inpatient	Besidential	EGHES	2 F	308	01		1/19/20	017 12:03
cal MRN:	J.E	GH Everaree	n 700	0000002710	700000000272	6 Inpatient	Residential	EGH ES	2 8	208	01		1/19/20	017 12:00
		GH Evergree	n 700	000002709	700000000272	5 Inpatient	Residential	EGH EN	2 E	254	01		1/19/20	017 11:58
		GH Evergree	n 700	000002708	700000000272	4 Inpatient	Residential	EGH EN	1 E	152	04		1/19/20	017 11:54
arch Reset	🥖 🕺 🖌	GH Lions Gal	te 700	000002707	700000000272	3 Inpatient	Neonatology	LGH 4E	4	20	01		1/19/20	017 11:50
	🥑 🗐 ເມ	GH Lions Gal	te 7000	000002706	700000000272	2 Inpatient	ZZENT	LGH 3P0	) 3	306	02		1/19/20	017 11:39
	ສີໃນ	GH Lions Gal	te 700	000002705	700000000272	1 Inpatient	Dermatology	LGH 2E	2	218	02		1/19/20	017 11:37
	- <b>- A</b> LU	GH Lions Ga	te 7000	000002627	700000000264	3 Inpatient	Gastroenterology	LGH 5E	5	518	01		1/13/20	017 3:39 F
	٠										_			۰.
												OK	<u>с</u> .	mad

*Note: The current build only allows you to add patients by encounter, not the entire patient record.* 

The patient's encounter you selected is now displayed in your list.Continue this step to add all of the patients and their encounters on your list.



Patie	nt List									
Þ	r »» 🔍 🌴 🤊	4 <b>0</b> 8 8 6 6	Image: A state of the state	2						
_										
Resea	rch 1 - Albert Ei	nstein MCFD - Katniss Ev	erdeen							
<b>~</b>	Location	Name	MRN	Encounter #	Age	DOB	Admitted	Admitting Physician	Reason for Visit	Primary Care Physician Visitor Status
ð	SGH MS 111 01	CSTPRODHIM, SALLY	700000379	7000000007384	66 years	20-Sep-1951	11-Jul-2017 00:49 PDT	rianicenig rinysteam	demo	Plisvck, Rayford, MD
	LGH ASC ASC 0:	CSTLOGINVSI, KINGPHILIP	700001800	700000002683	27 years	01-Jan-1990	18-Jan-2017 11:51 PST		Test	CERNER, CERNER
	LGH ED Hold A	CSTPRODREGEMPI, SQTWO	700000220	700000003200	27 years	01-Jan-1990	21-Feb-2017 11:21 PST		Test	Plisvca, Rocco, MD
1	LGH 6W 607 03	CSTPRODHIM, WILMADEMO	700001770	700000011217	33 years	26-Jan-1984	02-Oct-2017 09:16 PDT		Surgery	Plisvcn, Herb, MD
	LGH NSH HS2 0	CSTLABVIRTUAL, CANDY	700003798	3 700000005321	42 years	26-May-197	29-May-2017 08:15 PD		testing lab	Plisvcb, Stuart, MD

## **Removing Patients**

1 From the Custom Patient List, single-click to highlight the patient encounter you wish to remove from the list.



## Activity 2.3 – Modify / Delete Patient Lists

## **Modifying Patient Lists**

- 1 You can modify any of the properties of a Patient List after you have created it.
- 2 In the Patient List window, select the appropriate Patient List by clicking on the tab.

	Patient List
	∥ 🗗 >> 💐 🌴 🌴   �   ඞ 💼 🖻 💼 💼   @ 🚮   🚨
	Research 1 - Albert Einstein MCFD - Katniss Everdeen
	Location Name MRN Encounter # Age DOB Admitted Admitting Physician R
3	
	Click on the <b>Properties</b> icon

4 The **Customize Patient List Properties** dialogue box opens.

As HIM use of these filters will be very minimal, changes would typically be limited to changes to the *names* of the Patient Lists as needed.

Click **OK** to complete the activity.



## **Deleting Patient Lists**

1

Once the researcher and/or ROI requester is completed reviewing their list of patient charts in PowerChart, you can delete the Custom Patient List.

From the Patient List view, click the List Maintenance wrench icon  $\overset{\mathscr{P}}{\sim}$  .



3 The Modify Patient Lists dialogue box opens.

Select the Custom Patient List you wish to delete from the Active lists pane and click <a>[</a> to move it to the Available lists pane.



4 Right-click on the Custom Patient List you wish to delete under Available lists.

### Click Delete Patient List.

You will be prompted to select Yes to permanently delete the Patient list.

P Modify Patient Lists		×	
Woday Fatenc Lists  Available lists:  MCFD—Katniss Everdeess Delete Patient List	Active lists: Research 1 - Albert Einstein		Delete Patient List Ontinuing will permanently delete this patient I Do you wish to continue? Yes
	New OK Cancel		

The Custom Patient List will no longer appear in your Patient List view.

There is no way to recover a deleted list; therefore, it is important to ensure that the external requester/researcher is completed their review prior to deleting their list.

## Activity 2.4 – Granting Proxy to a Patient List

You can proxy any Patient List to another user with the assigned privileges.



ግ	Location	Name	MRN	Encounter #	Age	DOB
	LGH 2E 210 02	CSTPRODPAJARO, VALER	700000160	7000000000177	17 years	11-Feb-2000
	LGH LD LDR2 01A	CSTPRODMAT, BABY GIRL	700001780	700000002645	10 months	16-Jan-2017
	LGH 3W 305 01B	CSTPRODREG, TESTDIREC	700001860	700000002803	37 years	22-Feb-1980

2 The Customize Patient List Properties dialogue box opens. Click the **Proxy** tab to open the Proxy Tool.

#### Click New.

ustom Patient et Proxy	
Name (Lim Access End Date	Group     Provider     Access     From:     T1/16/2017     V 1241     P51
	Te:

3 From the Customize Patient List Properties dialogue box, select the **Provider** radio button.

Click the magnifying glass to the sight of the provider field.

Enter the *last name* of the researcher's name and/or the external ROI requester's name you wish to proxy the list to.

#### Click Search.

Last name:	First name:	Suffix		Samph
kwan	ebbie			Seach
	Alias:	Alias typ	e j	New Provider
	•			Preview
Usemame:				Clear
Limit by gro	up	S No de	ata filtering	
📃 Limit by org	ganization	💡 No da	ita filtering	
🔲 Limit by po	sition	No da	ta filtering	
E Limit by rela	ationship	No da	ita filtering	
	ant only			
View physici Name	Aliases	Services	Positions	Organizations
Usew physici Name Kwan, Debbie	Aliases	Services	Positions HIM - Manager/S	Organizations EGH Evergreen I
View physici Name Kwan, Debbe	Afates	Services	Positions HIM - Manager/S	Organizations IEGH Evergreen H
View physici Name Kwan, Dobbie	AFases	Services	Positions HIM - Manager/S	Organizations EGH Evergreen H



4 Single-click on the appropriate name. Click **OK**.

Last name:	First name:	Suffi	c	
kwan	debbie		•	Search
Title:	Alias:	Alias	type:	New Provider
	•		<b>v</b>	Preview
Username:				Clear
Limit by group	p	S No	data filtering	
Limit by organ	nization	S No	data filtering	
Limit by positi	ion	S No	data filtering	
🔲 Limit by relati	onship	S No	data filtering	
le i c				
oview prijsticiari	Aliases	Services	Positions	Organizations
lame				
lame Kwan, Debbie			HIM - Manager	/S EGH Evergreen H
Vame Kwan, Debbie			HIM - Manager	/S  EGH Evergreen H
Name Kwan, Debbie			HIM - Manager	/S  EGH Evergreen H

5 Click on the down arrow to the right of the **Access** field.

From the drop-down menu, select the type of access you wish to grant:

- Full Access: Read, add patient, remove patient and delete list.
- Maintain: Read, add patient and remove patient
- Read: Read ONLY.

For researchers and external ROI requesters, select Read.

Custom Patient List Proxy				
Name (Lim Access	End Date	C Group		·
		Provider Kwan, Debbie		
		Access:		
	(	Read Full Access Maintain		
		Read		
		//	× •	PST
			New	Annh
			New	Арру

### 6 Enter the start and end date of the proxy.

If you plan for this Patient List to be shared for a long-term, pick a date well into the future. For researchers, pick the valid research dates that are specified on the Institutional Approval or Research Extension Form.

When you have completed all the fields, click Apply.

ustom Patient List Proxy		
Name (Lim Access End Date	Group	
	Provider	
	Kwan, Debbie	
	Access:	
	From:	
(	02/01/2018 V 0001 V PST	
	02/01/2019 🔍 🗸 2359 🔍 PST	
		pclick on the
	la	rge down arrows to
	New Apply dis	splay a calendar.
	OK Cancel	

## 7 Your proxy will be displayed.

You can either select **New** to add an additional proxy or click **OK** to complete the action.

Name (Lim Access	End Date	
Kwan, Debbie Read	01-Feb	© Provider ◎ Provider Access: 11/16/2017 ↓ ↓ 1451 ↓ PST To: ····································
		New Apply

1

Note: To display the proxied Patient List in the researcher/external ROI requester's Patient List window, you will have to move the list from 'Available' Patient Lists to 'Active' Patient Lists.



Once the proxied Custom Patient List is an Active Patient List, it will display similar to the screenshot below. The name of the Custom Patient List will appear with the name of the Researcher/External Requester with the HIM staff who proxied the list in brackets.

The Researcher/External Requester will need to also make the list an Active Patient List in order to see the list.

Patient List					
¢ 🗗 » 🔍 🌴 🦄 💧	🖺 🗊 🖿 f	1 🖬 🖬   2	1		
test Oneology (Atho					
Concology (Athan	basca,				
Name	Location	DOB	Age	Gender	Medical S
Name PHSAMOCKXTEST, docone	Location 3B-CH 15 OF01	DOB 19-Feb-2003	Age 10 years	Gender Male	Medical S Paediatric

## Activity 2.5 – Printing a Patient List

1

To print a Patient List, select the list from your Patient list window and click the **Print** button



<sup>2</sup> The Print dialogue box will appear. Your defaulted printer should display and click **OK**.

P Print		<b>X</b>
Printer: [gh_him_1]	<b>(</b>	ок
		Cancel
	[	Set As Default

## **ACTIVITY 3 – Multiple Document (Batch) Scanning**

#### **Learning Objectives**

- At the end of this activity, you will be able to:
- Have an Overview of the Document Imaging Workflow for HIM Batch Capture
- Access the Kofax Capture
- Understand the Batch Classes
- Perform Document Imaging Scan / Quality Control / Validation

## **Overview**

Kofax Capture is a document scanning, indexing and extracting software solution that captures, classifies and extracts content from all types of paper documents and forms. This application will interface with Cerner to perform Validation. HIM Departments will be utilizing Kofax Capture for batch scanning. A "batch" is defined as documents that are grouped together in preparation for scanning. This can be a batch of documents for one patient (Inpatient discharges) or a batch of documents for multiple patients (Emergencies, Day Surgery or Loose Reports). Note that Ambulatory Clinics and smaller HIM departments may use Cerner Single Document Scanning functionality to scan individual documents into Cerner; however, HIM will be responsible to audit, store and destroy these documents.

### HIM Batch Capture Workflow:

- Chart / Loose Reports Received
- Prep
- Scan
- Recognition (Automated)
- Quality Control (QC)
- Remote to Central Site Batch Transfer (Automated)
- Validation (via Citrix)
- Export (Automated)
- Batch Indexing (Automated)
- Document in Cerner Millennium PowerChart for Viewing

Post go-live, patient charting/documentation will either be direct entry into PowerChart or by using clinical forms printed through WebForm Imprint. These forms will be barcoded with patient encounter and form identification, similar to our current "addressograph labels". These barcoded forms will be auto-detected/indexed through Kofax. However, we will continue to receive forms/documents that are external to the organization and these will need to have barcoded labels applied to them prior to scanning.

Refer to the following Document Imaging SOP's for details on the processing of charts/documents:

- 1. Prepping
- 2. Scanning
- 3. Quality Control and Validation Scanned Documents



## Activity 3.1 – Access the Kofax Module / Scan Documents

1 From your desktop, click on the Kofax Capture 10.2 folder



If you do not have this folder on your desktop, follow these steps to place on your desktop:

- a) Click on Start 2 / All Programs
- b) Click on the Kofax Capture 10.2 folder



c) Right click and select Send to / Desktop (create shortcut)



(

- 2 From the Kofax Capture 10.2 folder double-click **Scan**.
- 3 The Kofax Capture Login screen will appear. Enter your User ID and Password. Click **OK**.



4 The Configure Device Settings window will appear. Click **OK** 

Configure Device Settings	×
Selected Device: Fujitsu PaperStream_IP fi-7160 on STI - 0001	OK     Cancel
Default Page Size: Letter - 8.5 x 11 in	About

5 The Kofax Capture Scan window will appear. Click on **Cancel** to close the Open Batch pop-up window and then click **Create.** 

1111 🖬 💭 🖬 🖆 ann 🖷				
Home Insert View	Scan Settings			e 9
Create Opin Core Suspend	Scan Scan Stop Delete Reject	K ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔	Arr Al Spin Merge Orange Case Foldering	
Eaton	scan	nt Hotate Midde Page	Document Politier	
Scan Source: * Fujitsu PaperStream_IP	6-710 • O Remaining Volume Image: 1	99373		Scanner Profiles: LGH LOOSE REPORTS • 🖓 🖓 🦨 🗮
		Spec Bitch (35 batches)           Import Jones (1, 2013)         Class         Date & Tree         1           Bits, Adm. (1, 2013)         Discose (2017)         1/2020113         1/3           Bits, Adm. (1, 2018)         Discose (2017)         1/202013         1/3           Bits, Adm. (1, 2018)         Discose (2017) <th>Stat. Porty Second 5 Second 5 Sec</th> <th></th>	Stat. Porty Second 5 Second 5 Sec	
The coup prove of			· · · · · · · · · · · · · · · · · · ·	

Note: This screen shows the batches that have been already created.



Included in your "batch" of documents, you will find:

- Barcoded forms from WebForm Imprint.
  - Multi-page continuous forms.
  - Single-paged forms same document type. 0
- Non-barcoded forms (external forms).

This batch of documents has already been prepped. The typical steps involved in prepping include:

- Removing staples and paperclips
- Ensuring all pages are right-side up
- Cutting off rough edges and repairing damaged pages
- Arranging pages in the correct order for multi-paged documents
- Ensuring patient's name and FIN (encounter number) are correct on every page
- > For poor quality images, consider using a "Poor Quality Original" stamp on the page.

Of note, you will see:

- A Separator Sheet to separate bar-coded and non-bar coded documents.
- A FaceSheet or an I Have Been Scanned document (if no FaceSheet provided) at the last page of the batch.

Note: The order in which documents are prepped is critical.

### Some Important Notes Regarding Barcoded Forms and Separator Sheets



Sample Separator Sheet

For HIM Use Only

Separator Sheet -Recognition module will split on form barcode

No patient label.

### Separator Sheet

- Separator sheet will need to be deleted manually during Quality Control
- Multiple separator sheets should not be used in one batch
- Only used as a visual/physical split between barcoded and non-barcoded forms at the end of the batch
- During prep, non-barcoded forms will be placed at the end of the batch
- During the automated recognition process, forms are split/combined based on the barcode being detected
- Non-barcoded forms at the end of the batch will be **combined** in one book with the separator sheet and will need to be manually split in QC.

General Total	s Scan				
Batch class:	LGH INPATIENT			Priority:	5
Description:	ENCOUNTER				
Name:	LGH LOOSE REPOR	RTS 'PE			
Description:	WQM				
Pages per doo	cument: 0 🚔	Documents per batch:	0	Pages per batch:	0

6 The Create Batch window will appear. Select the Batch class:

- LGH/SGH Ambulatory
- LGH/SGH Day Surgery Loose Reports
- LGH/SGH Emergency Loose Reports
- LGH/SGH Inpatient
- LGH/SGH Loose Reports
- LGH/SGH Release of Information
- LGH/SGH Same Doc Type

### **Batch Class Descriptions**

Batch Class	Used For:	Description
Inpatient Ambulatory	Single Patient: Inpatient Ambulatory	<ul> <li>Batch prepped for one patient, single encounter.</li> <li>Patient labels should be on front and back of every page.</li> <li>Patient information is sticky.</li> <li>Same document type barcodes will combine: <ul> <li>Consent Form followed by a Consent Form will combine (assuming matching form barcode).</li> <li>Consent Form followed by a non-barcoded document will combine.</li> </ul> </li> <li>Multi-paged documents should be placed in chronological order and grouped together. <ul> <li>Same document types that need to be separated should be prepped between another document so they will not combine.</li> </ul> </li> <li>Non-barcoded forms prepped at end of batch with a separator sheet.</li> </ul>
Loose Reports	<ul> <li>Multi-Patient:</li> <li>Day Surgery Loose Reports</li> <li>Emergency Loose Reports</li> <li>Loose Reports</li> </ul>	<ul> <li>Batch can contain documents of different patients/encounters.</li> <li>Patient label should be placed on front and back of all pages.</li> <li>Splits on document type barcode.</li> <li>If document barcode is missing, documents will combine in QC: <ul> <li>Consent Form followed by a Consent Form will not combine (assuming match form barcode).</li> <li>Consent Form followed by a non-barcoded document will combine.</li> </ul> </li> <li>Multi-paged documents should be placed in chronological order and grouped together (manually combined in QC).</li> <li>Non-barcoded forms prepped at end of batch with separator</li> </ul>



		sheet.				
Same Doc	This batch consists	Batch can contain documents for different patients/encounters.				
Туре	of documents	Patient label placed on front and back of all pages.				
	belonging to the	Splits on patient label barcode.				
	same document type	If patient barcode is missing the document will combine with				
	(i.e Consent Forms)	previous patient barcoded document:				
		<ul> <li>Consent Form followed by a Consent Form will not</li> </ul>				
		combine for the same patient (assuming matching form				
		barcode).				
		Consent Form followed by a non-barcoded document type				
		will combine.				
		Multi-paged documents should be placed in chronological order				
		and grouped together (manually combined in QC).				
Release of	Release of	Batch can contain documents for different patients/encounters.				
Information	Information	Patient label placed on front and back of all pages.				
	Correspondence	Splits on patient label barcode.				
		Hardcoded ROI Doc Type.				
		Release of Information correspondence will all be within one book				
		per patient.				

<u>Note:</u> All documents will be scanned in grayscale. If your site has colored documents that have been identified as needing to be scanned in color (i.e. clinical impact/significance), you will need to pull these out during prepping and scan them separately by changing the **Scanner Profiles** under the **Home** tab to **Color**.

( <b>*** * * * * * * * * *</b>	2			Kofax Capture Scan			_ = x
Home Sert View Scan Setting	gs.						9 Q
Create Open Close Suspend Batch Scan	Stop Delete Reject Unreject Properties	90 90 Left Right Rotale Mode	Rescan VRS QC Later Non-blank Page	Document	Change Auto Class Foldering		
Scan Source: 📲 Fujitsu PaperStream_JP fi-7161 💌 🔕 🕴	Remaining Volume Image: 10998511					Scarner Profiles: Default	• <b>•</b> • • • •
Batch Contents	× Folder f	∜A Doc:N/A   Page:N/A   Totali	lages: 0 Tobal Docs: 0 Toba	Folders: 0		Citat Gaystab	

7 Place forms as indicated on scanner onto the scanner tray.



9 The scanned documents will appear on the window with thumbnails on the left hand column.



### 10 Complete the Batch Capture Coversheet.

Site:	Batch ID:					
Scanner #:						
Batch Class:	□ Inpatient □ Day Surgery Loose Reports	□ Loose Reports □ ROI				
	<ul> <li>Emergency Loose Reports</li> <li>Ambulatory (Clinic)</li> </ul>	□ Same Doc Type				
	Kofax User Profile Name	Date (DD-MMM-YYYY)				
Prepped By:						
Scanned By:						
QC'd By:						
Validated By:						
Audited By:						
Comments:						
Total # of Page	s HIM removed for Securing / Other	Date:				

## Complete the following:

- > Site
- Batch ID
- ➤ Scanner #:
- Batch Class
- Prepped By
- Scanned By
- > Comments





11 Click on the round Kofax button was at the top left corner. Choose EXIT.



12 After scanning all of your batches, the Scan dialogue box will appear. Click **Close** and then it will ask you to confirm in another box.

Click Yes.

Health Information Management – Clerk III



**13** The next process is called Kofax Recognition which is an automated process for indexing the scanned documents based on the barcodes.



## Activity 3.2 – Quality Control

### **Overview**

In this module you will examine the batch for quality:

- No pages are missing
- No blank pages
- Images are good quality
- Documents are separated correctly
- Documents are rotated correctly
- Color pages are rescanned in color if required
- All information on the page is readable and matches the paper copy
- Books are broken up appropriately

Functions available:

- Replace Images
- Insert Pages
- Delete Images
- Rotate Images
- Move Images



1

Open Quality Control from your desktop shortcut. If you don't already have this on your desktop, click on Kofax Capture 10.2 folder on your desktop. Double-click on **Quality Control**.

A Refay Can	sture 10.2		- to Sear	h Kofax Canture 10.2	0
Organize 👻 🗈 Open	Burn New folder			8= -	0
4 🔆 Favorites	Name	Date modified	Туре	Size	
Desktop	Administration	8/18/2016 2:08 PM	Shortcut	3 KB	
Downloads	Batch Manager	8/18/2016 2:08 PM	Shortcut	3 KB	
Recent Places	Export	8/18/2016 2:08 PM	Shortcut	3 KB	
	License Utility	8/18/2016 2:08 PM	Shortcut	3 KB	
4 🥽 Libraries	CCR Full Text	8/18/2016 2:08 PM	Shortcut	3 KB	
Documents	DDE Commission	8/18/2016 2:08 PM	Shortcut	3 KB	
🛛 🚽 Music	S Quality Control	8/18/2016 2:08 PM	Shortcut	3 KB	
Pictures	APP INSTANTING OF VET	8/18/2016 2:08 PM	Shortcut	3 KB	
Videos	Report Viewer	8/18/2016 2:08 PM	Shortcut	3 KB	
_	Scan	8/18/2016 2:08 PM	Shortcut	3 KB	
E Computer LD020724	Scanner Configuration Utility	8/18/2016 2:00 PM	Shortcut	2 KB	
	Separator Sheets	8/18/2016 2:08 PM	Shortcut	3 KB	
🖻 📬 Network	Nalidation	8/18/2016 2:08 PM	Shortcut	3 KB	
	Verification	8/18/2016 2:08 PM	Shortcut	3 KB	
Quality Control	Date modified: 8/18/2016 2:08 PM	Date created: 1/24/2018 10:26	AM		
Shortcut	Size: 2.47 KB				

2 The Kofax Capture – Login box will appear. Enter User ID and Password – Click **OK**.

Kofax Capture - Lo	ogin 🛛 🕅
User ID: Password:	Admin
ОК	Cancel Change Password

3 The Kofax Capture Quality Control window will appear displaying all open batches that have been scanned.

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and the second second	A	TRACTOR DESCRIPTION FOR FOR A	
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Onits Open Think Superiol			
Batth -	504	Lat Safety Rame Page Distanced Page	
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the function of the second sec	Party N.S.   Can N.S.   Can	Mill Table - The Control of Table - The Contr	
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		A DE LE CENTRE DE	

4 Select the Batch ID that you wrote on the Batch Capture Coversheet – click on the Date & Time and/or Name column to sort and find your Batch ID. Click OK.

	Class	Date & Time	! Status	Priority	
174_Admin_1/24/2018	LGH INPATIENT	1/24/2018 11:4	Ready	5	
152_Admin_1/18/2018	ENCOUNTER	1/18/2018 3:38	Suspended	5	
1151_Admin_1/18/2018	ENCOUNTER	1/18/2018 3:38	Ready	5	
1150_Admin_1/18/2018	ENCOUNTER	1/18/2018 3:29	Suspended	5	
1149_Admin_1/18/2018	ENCOUNTER	1/18/2018 3:16	Error	5	
1120_Admin_1/9/2018	ENCOUNTER	1/9/2018 3:40:	Suspended	5	
1097_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:37	Suspended	5	
1096_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:33	Error	5	
1095_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:28	Error	5	
1094_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:23	Error	5	
1093_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:18	Suspended	5	
1091_Admin_1/3/2018	ENCOUNTER	1/3/2018 4:56:	Error	5	
1090_Admin_1/3/2018	ENCOUNTER	1/3/2018 4:51:	Error	5	
1089_Admin_1/3/2018	ENCOUNTER	1/3/2018 4:45:	Error	5	
1087_Kevin_1/3/2018	ENCOUNTER	1/3/2018 4:25:	Error	5	
1077_Admin_1/2/2018	LGH LOOSE REPORTS	1/2/2018 3:26:	Suspended	5	
1076_Admin_1/2/2018	ENCOUNTER	1/2/2018 3:25:	Suspended	5	
	LOU THOATTONT	1/2/2018 3:25:	Sugnanded	E	

5 The scanned documents will appear on the window. The cursor will always land on Page 1, Image 1.



6 Compare each paper page with the screen page to ensure they are identical (see QC/Validation SOP). Click the "**Enter**" button after every page.







Check books are accurately separated.

(;;;;) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) (	3/14/2016 31 - Kofax Capture Quality Control
Home Insert View Scan Settings	
Create Open Close Suspend Batch	Jack         Jack <td< th=""></td<>
Scan Source: Software Import 💽 🗿 Remaining	Volume Image: 2999896 Sc
Batch Contents	× ENCOUNTER   Single Encounter Document   Standard Form   Folder: N/A   Doc: 1   Page: 1   Total Pages: 6   Total Docs: 2   Total Folders: 0
3/14/2016-31 1: Standard Fom 1: Standard Fom Page 1, Jinope 1 Page 2, Jinage 2 Page 2, Jinage 2 2: Standard Fom	<image/> <image/> <section-header><section-header><section-header><section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header>

### What are Books?

- Images are broken down based on the logic of the batch.
- Books consist of images that belong together.

 $\geq$ 

- Each book should have a single patient and a single document type.
   Examples:
  - ✤ Example 1:
- Daffy Duck has a 3 page Progress Note followed by a 2 page Physician Order.
  - > How many books will there be?
    - ✓ 2 books
  - How many pages will be in each book?
    - ✓ Book 1 = 3 page Progress Notes
    - ✓ Book 2 = 2 page Physician Orders
- Example 2: There are 7 pages of Progress Notes in a row.

The first 4 pages belong to Madonna, the last 3 pages belong to Cher.

- How many books will there be?
  - ✓ 2 books
- How many pages will be in each book?
  - ✓ Book 1 = 4 pages for Madonna
  - ✓ Book 2 = 3 pages for Cher

<sup>8</sup> A blue check mark will appear over the pages that you have QC'd.

In QC, you have the ability to split, merge, insert and delete pages.

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For Help, press F1							

### Kofax Shortcut Keys

The grid below displays the shortcut keys for Kofax for managing the scanned documents.

Action	Keystroke
Open a Batch	CTRL + O
Close a Batch	CTRL+L
Suspend the Batch	CTRL + S
Delete the Batch	CTRL + D
Combine	c
Reject document or page	CTRL + R then press a
	number or type a
	rejection reason
Go to Next Document	CTRL + P
Go to Previous Document	CTRL + SHIFT + B
Split the Document	S
Delete the Document	Delete Key
Rotate left	1
Rotate Right	]
First Document	CTRL+F
Last Document	CTRL + Shift + F
Next Page	CTRL + B
Previous Page	CTRL + Shift + B
Exit	ALT + F4

#### **Splitting Documents**

9 Click on the page to split and click the **Split** button. The system will now move the page to a new book.



### **Merging Documents**

If you see a page belonging to the same document prior you will need to merge these to the same book as they belong together (only applies to multi-paged documents).

10 Click the page that you want to merge and drag and drop the page into the book in the correct sequence that you want it to display. The system will now move the pages to the same book.

Note: Always delete Separator Sheets.







- **13** The Open Batch window will re-appear to allow you to continue QC'ing any other batches you scanned.
- <sup>14</sup> If you want to move to Validation, click **Cancel.**

lame	Class	Date & Time	! Status	Priority
174_Admin_1/24/2018	LGH INPATIENT	1/24/2018 11:4	Ready	5
152_Admin_1/18/2018	ENCOUNTER	1/18/2018 3:38	Suspended	5
151_Admin_1/18/2018	ENCOUNTER	1/18/2018 3:38	Ready	5
150_Admin_1/18/2018	ENCOUNTER	1/18/2018 3:29	Suspended	5
149_Admin_1/18/2018	ENCOUNTER	1/18/2018 3:16	Error	5
.120_Admin_1/9/2018	ENCOUNTER	1/9/2018 3:40:	Suspended	5
.097_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:37	Suspended	5
.096_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:33	Error	5
.095_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:28	Error	5
094_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:23	Error	5
093_Admin_1/4/2018	ENCOUNTER	1/4/2018 10:18	Suspended	5
091_Admin_1/3/2018	ENCOUNTER	1/3/2018 4:56:	Error	5
090_Admin_1/3/2018	ENCOUNTER	1/3/2018 4:51:	Error	5
089_Admin_1/3/2018	ENCOUNTER	1/3/2018 4:45:	Error	5
087_Kevin_1/3/2018	ENCOUNTER	1/3/2018 4:25:	Error	5
077_Admin_1/2/2018	LGH LOOSE REPORTS	1/2/2018 3:26:	Suspended	5
076_Admin_1/2/2018	ENCOUNTER	1/2/2018 3:25:	Suspended	5
075_Admin_1/2/2018	LGH INPATIENT	1/2/2018 3:25:	Suspended	5
scription: mber of documents:	4 Number of pages	:: 8	ſ	OK Cancel Filter Refresh Helo

15 Click on the round Kofax button was at the top left corner. Choose EXIT.



## Activity 3.3 – Validation

### <u>Overview</u>

The Validation module runs from Citrix. During this step, extracted values for patient information and document types are validated against the database and the documents are then indexed according to the following fields:

- FIN Encounter Number
- MRN Medical Record Number
- Patient Name Last Name, First Name
- Document Type

Index Fields		>
FIN:		
MRN:		
Patient Name:		
Doc Type:	Mental Health Assessment	

A parent folder can consist of many document types. For example the parent folder 'Consent Procedure' will contain document types such as: Acute Care Services Consent – Surgical Operation, Special Operation, Special Procedure or Treatment and Special Considerations: Consent for Personal Health Information Access. Each WebForm Imprint form will have a parent folder name listed in the header.

### **Purpose of Validation:**

- Review/validate the accuracy of the index boxes for the scanned documents in a batch with the database.
- The values in the index fields will be used to place the documents in the appropriate patient chart (on the correct encounter) under the appropriate document type.
- In Validation the system only allows the users to view the first page of each book since all images in a book belong to the same document type.

### Validation Process:

- Index Fields are displayed on the left hand side of the screen.
- You should be ensuring that both patient information is correct as well as the appropriate document type selected.
- Document Types are extracted from the Document Type Barcodes and can be added or changed using the Document Type Search Window.
- Patients are extracted from the Patient Label and can be added or change using the Patient Search Window.
- There are two ways to process within Kofax Validation. This is determined based on the Batch Class:

### Manual Validation:

- During manual validation, the user tabs through all the boxes and verifies information and matches the documents
- $\circ$  The 1st page of each book will display when tabbing
- Indexed data can be corrected, if necessary
- Encounter search window or document type search window will open if there is missing information
- After all documents have been tabbed through, module will ask to save and submit the batch.

### Auto Process Documents:

- o Automatically processes patient information and document type
- Use only for the Inpatient or Ambulatory batch classes since documents could combine to wrong encounter if patient label didn't read properly
  - Risk 1<sup>st</sup> page of new encounter document could append to last page of previous encounter document



 1 Launch via the Citrix StoreFront Index shortcut.

 Image: Construct of the Citrix StoreFront Index shortcut.
 Image: Construct of the Citrix StoreFront Index shortcut.

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2 The Kofax Capture – Login box will appear. Enter User ID and Password – Click **OK**.

Kofax Capture - Lo	gin		×
User ID: Password:	Admin		
ОК		Cancel	Change Password

3 The Open Batch window will appear. Select the desired batch from the list. Click OK.



4 Enter Millennium user credentials if required. However, Single Sign-On should not require user credentials to be entered.



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5 The window will display three panes, depending on your screen size, expand the panels using the click and drag function, so that you can see all the panes. Maximize your screen.

22 ≥ Q ≤ A < 2 2 3						Ţ	Test001]_Admin	in_2/5/2018 - Kofax Capture Validat	📲 🖓 🖾 🖓 🖓 🖓 🖓 🖓 🖓 🖓	¢y) ∓					{Te	s#001)_Admir	n_2/5/2018 - Ko	fax Capture Vi	lidation
Hone Inset View M/P Den Cose Surgerd Eatch Edition Batch Millenn × Inder Fields × LOP DPA	Edit Edit Single Inpatient Document	90 Right state t Single Inpu	Pan Zoom Mode	Rubber Band OCR	Save Spl	Merge Document Page: 1	Change Total Pages: 2	Change Auto Class Foldering Folderi Total Docs: 1   Total Folders: 0	Home Insert View MV Open Close Supperd Eatch Millenotym Validation Panel 22	Deinter Rep	ed Unreed Properties	90 90 Left Right Rotate	Pan Zoom Rubber Rubber Mode	Save Save	Document Single Inpe	Ounger Typer	Auto Folder Folder: N/A	ng Doc: 1 Pag	e: 1   Total Pages: 2
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If all of the forms have both the document type barcode and patient barcode, and they are recognized, then these values will populate the **Index Fields** automatically.





Note: There is an **Auto Process Documents** button which will automatically index the forms if all of the Index Fields were automatically populated. It is at the discretion of the Records Management Manager to determine when an end user can begin to utilize the functionality of Auto Processing in the step of Validation."

The system will then move to the next document that has missing fields. If there are NO barcodes or the barcodes were not recognized, you will have to **tab manually** through each Index Field and either **manually apply the MRN and/or the Document Type** 

	Index Fields	×
5	FIN:	
-	MRN:	
	Patient Name:	
,	Doc Type:	Medications Admir

7

8 To manually Validate documents that have a document type barcode, but no patient barcode, you will be prompted to select a patient when you are in the blank MRN index Field or you click the **Select Patient** button Select Patient on the left-hand pane to confirm patient and select correct encounter from

button Select Patient on the left-hand pane to confirm patient and select correct encounter from the **Encounter Search** window and click **OK**.

	VIP	Deceased A	Alerts	BC PHN	MBN M	lame		DOB	Age	Gender	Address	Address (2)	City	Posta
	2			987654146	3 700007350 0	STPRODHI	M, STESTSIX	01-Oct-2000	17 Years	Female	1081 Burrard	St	Vancouver	
÷ •	-													
•														
ode:	•													
lumber:	Faci	ility	Enco	unter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room	Bed Est	Arrival Date	Reg Date	Disch Date	
	<b>3</b> 1	.GH Lions Gate	7000	000015682	700000015682	Inpatient	Cardiac Surgery	/ LGH 2E	224	03		29-Nov-2017 8:25	5 02-Jan-201	8 15:1
1000	-													
1682														
	-													
IN:														
Revel	-													
Terei														
	1													

9 To manually Validate documents that do not have a Document Type barcode, you will be prompted to select a **Document Type** from the left-hand pane. Click on the ellipsis to do a Document Type Search. Under **Document Alias**, enter the number under the Document Type barcode if available. If the Document Alias is not available, you can search by Document Type or Subject.

		Document Type Search
lennium Validation Panel	×	Document type:
Auto Process Documents	]	l Subject
Select Patient		Document alas: Results:
		Document type Subject Document Alias
Document Type:		Abdominal Parac Abdominal Para
		Abdominal Ultras Abdominal Ultras
Aedications Administration Becc 🚽		Admission Note P., VGH Burn Estim., 4674
	1	Advance Care PL. North Shore Hos 6437
		Advance Care PL. Advance Care P 2611
ccession		Advance Lare PL. Hesideniai Lare 5317
1000331011.		Advance Care PL. Form 3 - Centroa 6/36
	1	Advance Care PL. Point 2 - Centrica 6/5/
		Advance Care PL Form 1 - Cettilica
	1	Advance Care PL My Advance Car., 6074
		Allergy Immunolo Allergy Immunolo
	1	Allergy Immunolo Allergy Immunolo
Help		Allergy Immunolo Allergy Immunolo
	J	La
		Show all document types DK

Note: You can adjust the document, if it does not appear in an upright position by using the **Rotate** arrows.



10 After all documents have been validated, click Save.



11 The Kofax Capture Validation window will appear. If you want to re-review, click **No**, if you want to move to the next batch click **Yes**.



To re-review, use the arrow buttons at the bottom of the screen to move through the documents. By hovering over the arrows there will be a description of what each arrow function is.

		0	
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12		0
	To end the session, click Close	Close



## **ACTIVITY 4 – Task Queue**

#### **Learning Objectives**

- At the end of this activity, you will be able to:
- Have an Overview of the Task Queue
- Identify Task Types associated with your role in HIM
- Set and View Task Queue Preferences / Options
- Manage the Assembly Residential Task Queue (Pass/Complete a Task)
- Manage the Pre\Scan Reconciliation Task Queue (Pass/Transfer/Complete a Task)
- Change the Status / Remove / Add Encounter or Notes to a Task
- Preview and Print Reports

### **Overview**

The Task Queue in HIM ProFile manages the creation, modification, and completion of tasks required by your organization to fulfill records management activities. Rules have been built for each patient encounter type so that the task queues are automatically created. The order of tasks can include prerequisites, for example, chart assembly/prep and scan must be completed prior to QA.

The following is a list of the available Task Types available in the Task Queue and the associated HIM roles:

Task Type	HIM Role
Assembly - Residential	HIM Clerk III
Prep/Scan - Reconciliation	HIM Clerk III
QA – Day Surgery	HIM Clerk IV – Record Completion/QC
QA - Inpatient	HIM Clerk IV - Record Completion/QC
For Review	All HIM Roles, except Clerk IV - ROI

It is important to note the following:

- For the **Assembly Residential** task type, the Task Status will need to be manually changed to "Complete" after the paper chart has been assembled.
- The Prep/Scan Reconciliation task type is to be used to reconcile any paper charts/chartlets that have not been prepped / scanned into the system.
  - The system has been built to *automatically* remove prep/scan tasks from the Task Queue after the system detects a Facesheet or an "I Have Been Scanned" document that is placed at the end of each patient encounter when scanned.
  - If after investigating, and there are no paper documents associated with an encounter, you can transfer the task to the applicable QA task.

0

## Activity 4.1 – Set and View Task Queue Preferences / Options

1 From the View menu select **Options**. The Options window is displayed.

🕑 ProFile: 1	Task Queue		
Task View	Help		
2(	Task Details		As of 12:14:49
	Application Toolbar		
Filte	Options		ete / In Process / Pend
Name		MRN	🛆 Task Status 🛛 Task Ty

2 Task Queue preferences for HIM include filtering by Status. Under the **View** tab, select **Hide tasks of this status** and select **Complete**. This will set your preferences to only view outstanding tasks. Click **OK**.

otions		
View Duery Printing Export Debugging		
Hidden Tasks		
• Hide tasks of this status		
Complete		
Pending		
Opened On hold		
Rework		
L		
Prompt to modify task note when a task is saved		
Include time in date/time column sort		
OK Cancel	App	lų.
		·



### Activity 4.2 – View a Task Type 1 From the Citrix StoreFront, select the Task Queue icon 2 The ProFile Task Queue window will open and look similar to this. 🧭 ProFile: Task Qu Task View Help .... LGH Lions Gate Hospital More Tasks 2 6 9 1 P (( Filters: Update Date: All Dates / Complete / In Process / Pending / Opened / On Hold ne MRN 🙄 Taik Status | Taik Type | Reason | User | Update Date | //: Oreske Date | Admit Date | //: Orichtage Date | /: Orichtage 3 Select the Facility by clicking on the drop-down arrow. Facilities are listed in alphabetical order. Task View Help → 40 ◆ → 10 12 Multiple 9 otherapy Clinic Nes Education Clinic Ioencephalography Clinic Filters: Update Date: All Dates / Complete / In Process / Pending / Opened / On Hold bilitation Outpatient Program IROP tent Access Clinic JRAC Name MRN 🗸 Task Status Task Type Resson User Update Date /\* Create Date Admit Date /\* Discharge Date Patient Type Financial Class Facility Med ia Clínic eurology Clinic RA aging MaxWh Care Click Choose Task Type (...) on the toolbar. The Task Types dialog box is displayed. 4 Select the Task Type of Assembly – Residential and click As of.



5 The selected Task Type or Task Types are displayed and your screen will look similar to this.

Rev &	a 🗟 🔶 😑 🗹 🗄 🖷	. 🖌 🦂	As of 12:1	4:49 Al Task	fypes							LGH Lions	Gate Hosp	ital					•	More T	asks
Effect:         Update Date:         / Complete / In Process / Poundary / Opened / On Hold           Name         Nimit         / Taik Stand         Taik Taik         Taik Stand         Taik Stand         Taik Taik         Taik Stand         Taik Stand <th>2 🕞 🖻 🗊 関 🕷</th> <th></th>	2 🕞 🖻 🗊 関 🕷																				
Name         With         I         Task Space         Task Space         Descore         Desc	Rers: Update Date: All Dates / Complete / In Process / Pending / Opened / On Hold																				
CSTPRODHW, WILMACEMD         X0000770, OH48d         GA-Instanter         Feedback         TestUse, Color-Hard         Status 2017 18.23 (Status 2017 18.2	Name	MBN	/ Task Status	Task Type	Reason		User		Update Date	/ Create Dat	te	Admit Date		/ Discha	rge Diate	Patient Type	Financial Class	Facility	Medical Service	Balanc	e Financ
CS PRODUNEL VILLAGEND         70000770 Orhidal         GA - Ingenter         Analysis - For Review         Fall Lons Gave         24.4/2017 (01.143)         21.4/2017 (0	CSTPRODHIM, WILMADEMO	700001770	OnHold	QA - Inpatient	Analysis	- For Review	TestUser, Clo	ek-HIM	15-Sep-2017 11:55:4	8 24-May-2017 1	4:32:23	19Jan-2017	7 11:37:00	19Jan-201	7 11:39.00	Inpatient	MSP	LGH Lions Gate	Dermatology	0	70000
CSTPRODHW, VILLMODRO         70000770, OrHeld         For Review         Analysis - For Training Review Stricts, SYSTEM Come (B-Au-2017 1016:2)         BAu-2017 1207/01 [B-au-2017 1016:0] Impact MMP         MEP         Life Lises Base Internal Medicine         0         7000           CSTPRODHW, VILLMODRO         70000770 OrHeld         For Review         Analysis - For Review         SYSTEM Come (B-Au-2017 1016:2)         BAu-2017 1207:00 [B-Bu-2017 1200         Bioseant MMP         Life Lises Base Internal Medicine         0         7000           CSTPRODHW, VILLMODEND         70000770 OrHeld         For Review         Analysis - For Review         SYSTEM Come (B-Au-2017 1016:2)         Bioseant T17 10100         Bioseant MMP         Life Lises Base Internal Medicine         0         7000           CSTPRODHW, VILLMODEND         70000770 OrHeld         For Review         Analysis - For Review         SYSTEM Come (B-Au-2017 1012:2)         Bioseant T17 10100         Bioseant T17 101000000         Bioseant T17 10100000000000000000000000000000000	CSTPRODHIM, WILMADEMO	700001770	OnHold	QA - Inpatient	Analysis	<ul> <li>For Review</li> </ul>	TestUser, Cle	sk-HIM	26Jul-2017 08:14:15	24-May-2017 1	4:33:06	19Jan-2017	7 11:50:00	19-Jan-201	7 11:54:00	Inpatient	MSP	LGH Lions Gate	Neonatology	0	70000
CS PRODUMI, WILARCHO         2000/07/0 Orbid         For Rever         Asylain-Far Rever         515/EEX 515/EE (06/ash.2017 (116/28) (16/ash.2017 116/28) (16/ash.2017 116/ash.2017 116/ash.2	CSTPRODHIM, WILMADEMO	700001770	OnHold	For Review	Analysis	<ul> <li>For Training Review</li> </ul>	SYSTEM, SY	STEM Cerner	01-Jun-2017 13:05:3	0 01-Jun-2017 13	3.05:30	19Jan-2017	7 12:07:00	19-Jan-201	71211:00	Inpatient	MSP	LGH Lions Gate	zzInternal Medicine	0	70000
CSTPRODUNTUTSTING 70000770 Orbid Chemer Adapter For Fereire SYSTEX SYSTEM Cemer (34-w2017 02-01) [34-w2017 03-01) [34-w2017 12-30) [34-w2017 12-30] [34-w2017 1	CSTPRODHIM, WILMADEMO	700001770	OnHold	For Review	Analysis	For Review	SYSTEM, SY	STEM Cerner	09Jun-2017 10:16:2	3 09Jun-2017 10	0:16:29	19Jan-2017	7 11:37:00	19-Jan-201	7 11:39:00	Inpatient	MSP	LGH Lions Gate	Dermatology	0	70000
12 FPRODHM, UTESTPATERT (20000002) Orefait DA - Ingenter A adapter - For Taleng Reverse (2010) EXTPRODHM, UTESTPATERT (20000002) Orefait DA - Ingenter A adapter - For Taleng Reverse (2010) EXTPRODHM, UTESTPATERT (20000002) Orefait DA - Day Sugary Analysis - For Reverse Schwadz, Hagge Schwadz, H	CSTPRODHIM, WILMADEMO	700001770	OnHold	For Review	Analysis	- For Review	SYSTEM, SY	STEM Cerner	09-Jun-2017 10:20:1	3 09-Jun-2017 10	0:20:18	19-Jan-2017	7 11:50:00	19-Jan-201	7 11:54:00	Inpatient	MSP	LGH Lions Gate	Neonatology	0	70000
CSTPRODNEN, UTTSTPATIENT 700000023 Oxfold         For Reverw         Assign: For Training Reverw         Comment (SAss, 2017) 10:42, 2018, 2014; 2013; 2014; 2013)         CSTPRODNEN, MUTTSTPATIENT 700000023 Oxfold         MSP         CSTPRODNEN, MUTTSTPATIENT 700000023 Oxfold         CSTPRODNEN, MUTTSTPATIENT 700000023 Oxfold         MSP         CSTPRODNEN, MUTTSTPATIENT 700000023 Oxfold         CSTPRODNEN, MUTTSTPATIENT 700000023 Oxfold         MSP         CSTPRODNEN, MUTTSTPATIENT 700000023 Oxfold         CSTPRODNEN, MUTTSTPATIENT 700000023 Oxfold         MSP         CSTPRODNEN, MUTTSTPATIENT 70000000000         MSP         CSTPRODNEN, MUTTSTPATIENT 7000000000000000000000000000000000000	CSTPRODHIM, UTTESTPATIENT	700000023	OnHold	QA - Inpatient	Analysis	<ul> <li>For Training Review</li> </ul>	TestUser, Cle	ek-HIM	07-Jul-2017 10:27:00	24-May-2017 0	8:15:19	28-Nov-2011	6 15:43:00	28-Mar-201	7 15:41:00	Inpatient	MSP	LGH Lions Gate	General Surgery	0	70000
(2) PHOLOMEN, HINE (2) MG2 (2000) (2) PHOLOMEN, Hogge 24/4-y/17 (102:12) (4) A2/17 (102:10) (4) A2/17 (10	CSTPRODHIM, UTTESTPATIENT	700000023	OnHold	For Review	Analysis	<ul> <li>For Training Review</li> </ul>	SYSTEM, SY	STEM Cerner	09Jun-2017 10:14:2	0 09-Jun-2017 10	0:14:20	28-Nov-2011	6 15:43:00	28-Mar-201	7 15:41:00	Inpatient	MSP	LGH Lions Gate	General Surgery	0	70000
(S1PHDDHML HLUES DARCHE, 2000,000 DH by Sugary, Analysis -1st Flereer Standards, Hugge (24144-2017) 1322 21 21444-2017) 1222 13 114-042019 (UK300 (DH by 2017) 1220 10 Dh by Sugary, SELP Lish Lish Lish Pan Medore 0 7000     (241-0-9 Sugar), ST TEK, 515TEK Cereir 244-9-2017 1428 50 2444-2017 1428 50 114-9-2017 0652 00 1444-9-2017 00.5100 Dh g Sugary, HEP Lish Lise Gae Candelog 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lise Gae Candelog, 0 7000     (241-0-9 Sugar), SELP Lish Lish Lish Sugar)     (241-0-9 Sugar), SELP Lish Lish Lish Lish Lish Sugar)     (241-0-9 Sugar)     (241-0-9 Sugar), SELP Lish Lish Lish Lish Lish Lish Lish Lish	CSTPHODHIM, HIMTESTING	700000414	UnHold	QA · Day Surgery	Analysis	<ul> <li>For Training Review</li> </ul>	Schneider, M	aggie	22-May-2017 08:21:1	0 10-Apr-2017 0E	8:36:08	10-Apr-2017	08.29.00	10-Apr-201	7 08:35:00	Day Surgery	PHOV	LGH Lions Gate	General Surgery	0	70000
(STPHOUMIN, SALLTOLMU //00000/n Perang (A-Op Suppy, STSTEM care 24469-2017 K2dSO 24469-2017 K2dSO 14469-2017 (BS200 14469-2017 05SO Up Suppy, MSP Lan	CSTPRODHIM, RULES DAYCARE	700000065	UnHold	QA - Day Surgery	Analysis	For Review	Schneider, M	aggie	24-May-2017 13:22:3	7 24-May-2017 1	3:22:13	11-Aug-2016	610.43.00	09-May-20	17121200	Day Surgery	SELF	LGH Lions Gate	Pan Medicine	0	70000
	CSTPHUDHIM, SALLYDEMU	700000378	Pending	UA - Day Surgery			SYSTEM, SY	STEM Cerner	24-May-2017 14:28:5	0 24-May-2017 1	4:28:50	11-Apr-2017	06:52:00	14-May-20	17 00:51:00	Day Surgery	MSP	LGH Lions Gate	Cardiology	0	70000

## Activity 4.3 – Manage the Asembly - Residential Task Queue

Residential (ECU) charts will remain in paper. They will continue to be assembled as we do today.

Utilize these tips to manage the Task Queue efficiently and easily:

- Click a column heading to change the order in which the data is displayed (ascending/descending order). Always click on the Discharge Date column to show the oldest tasks at the top. These are the priority for following-up on and will be denoted with a red color under the **Task Age Indicator** if it is considered "overdue".
- You can rearrange the column order by dragging and dropping the column headers to where you want them to display.
- Adjust the width of a column by clicking the line separating two column headings and dragging until the column is the size you want.

#### Change the Status of a Task

1 Once you have completed assembling a residential chart, you can change the status of the task. Select the task you want to change from the list of tasks displayed.

🔮 ProFile: Task Queue																				
Task View Help																				
: 🖆 💩 🔌 🖾	🖹 🏟 🎐 🖶 😰 🖶 🚵 🖉 🖉 🖉 (Az of 1826:11)   Assembly - Residential																			
🖾 🖻 🖻 関 🕷																				
Filters: Update Date: Al	ll Dates / Co	mplete / In	n Process / Per	nding .	/ Opened / On Hold															
Name	MBN T	ask Status	Task Type	F	Reason	User		Update Date		∠ Create	Date	Admit Date		Discharge D	ate	Patient Type	Financial Class	Facility	Medical Service	
HIM-PatientThree, Leslie	760000989 0	nHold	Assembly - Reside	ential A	Inalysis - For Review	Train, Clerk-	HIM8	2018-Mar-1918	25:58	2018-Mar-1	2 17:28:25	2018Jan-11	1 05:56:00	2018Jan-11	18:30:00	Outpatient		LGH Neuro RO	P Physical Medicine an	d Rehabilitation
HIM-PatientThree, Ronald	760000990 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	28:46	2018-Mar-1	2 17:28:46	2018-Jan-11	1 05:56:00	2018-Jan-11	18:30:00	Outpatient		LGH Neuro RO	Physical Medicine an	d Rehabilitation
HIM-PatientThree, Rudolph	760000991 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	28:57	2018-Mar-1	2 17:28:57	2018-Jan-11	1 05:56:00	2018-Jan-11	18:30:00	Outpatient		LGH Neuro RO	Physical Medicine an	d Rehabilitation
HIM-PatientThree, Gene	760000992 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	29:07	2018-Mar-1	2 17:29:07	2018-Jan-11	1 05:56:00	2018-Jan-11	18:30:00	Outpatient		LGH Neuro RO	Physical Medicine an	d Rehabilitation
HIM-PatientThree, Eddie	760000993 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	29:18	2018-Mar-1	2 17:29:18	2018Jan-11	1 05:56:00	2018-Jan-11	18:30:00	Outpatient		LGH Neuro RO	Physical Medicine an	d Rehabilitation
HIM-PatientThree, Martin	760000994 P	ending	Assembly - Reside	ential		Schneider, N	laggie	2018-Mar-12 17:	29:29	2018-Mar-1	2 17:29:29	2018Jan-11	1 05:56:00	2018Jan-11	18:30:00	Outpatient		LGH Neuro RO	Physical Medicine an	d Rehabilitation
HIM-PatientThree, Vernon	760000995 0	nHold	Assembly - Reside	ential A	Inalysis - For Training Review	// Train, Clerk-	HIM8	2018-Mar-19 18	:25:35	2018-Mar-1	2 17:29:39	2018Jan-11	1 05:56:00	2018Jan-11	18:30:00	Outpatient		LGH Neuro RO	Physical Medicine an	id Rehabilitation
HIM-PatientThree, Felix	760000996 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	29:51	2018-Mar-1	2 17:29:51	2018Jan-11	1 05:56:00	2018 Jan 11	18:30:00	Outpatient		LGH Neuro RO	P Physical Medicine an	d Rehabilitation
HIM-PatientThree, Andres	760000997 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	:30:02	2018-Mar-1	2 17:30:02	2018-Jan-11	1 05:56:00	2018-Jan-11	18:30:00	Outpatient		LGH Neuro RO	P Physical Medicine an	d Rehabilitation
HIM-PatientFour, Jacqueline	760001004 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	:30:24	2018-Mar-1	2 17:30:24	2018-Jan-11	1 05:56:00	2018-Jan-17	13:24:00	Outpatient		LGH EEG	Neurology	
HIM-PatientFour, Janice	760001006 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	:30:37	2018-Mar-1	2 17:30:37	2018-Jan-11	1 05:56:00	2018-Jan-11	13:24:00	Outpatient		LGH EEG	Neurology	
HIM-PatientFour, Karen	760001000 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	:30:45	2018-Mar-1	2 17:30:45	2018-Jan-11	1 05:56:00	2018-Jan-11	13:24:00	Outpatient		LGH EEG	Neurology	
HIM-PatientFour, Latoya	760000999 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	:30:51	2018-Mar-1	2 17:30:51	2018Jan-11	1 05:56:00	2018Jan-11	13:24:00	Outpatient		LGH EEG	Neurology	
HIM-PatientFour, Mona	760001001 P	ending	Assembly - Reside	ential		Schneider, N	laggie	2018-Mar-12 17:	:30:58	2018-Mar-1	2 17:30:58	2018Jan-11	1 05:56:00	2018Jan-11	13:24:00	Outpatient		LGH EEG	Neurology	
HIM-PatientFour, Patti	760001002 P	ending	Assembly - Reside	ential		Schneider, N	laggie	2018-Mar-12 17:	:31:04	2018-Mar-1	2 17:31:04	2018Jan-11	1 05:56:00	2018Jan-11	13:24:00	Outpatient		LGH EEG	Neurology	
HIM-PatientFour, Rosalie	760000998 P	ending	Assembly - Reside	ential		Schneider, N	faggie	2018-Mar-12 17:	31:14	2018-Mar-1	217:31:14	2018Jan-11	1 05:56:00	2018-Jan-11	13:24:00	Outpatient		LGH EEG	Neurology	

2

You can change the status by using the Task menu and selecting the status, right-clicking on the selected chart and select the status or by clicking on the buttons on the toolbar. For Assembly – Residential, you will only use either **Complete** or **Pass**.





### Passing a Task

You would select **Pass** on a task in the cases where the assembled residential chart requires someone else to analyze/check the assembly order (i.e. new staff in training).

- <sup>1</sup> To pass on a task, select the task from the Task Queue and click **Pass on Task** ڬ on the toolbar.
- 2 The Pass on task dialog box appears. Select a Pass on task reason and click **OK**. The task is displayed with a task status of **OnHold**.



Note: After you refresh the application, the task status will change to On Hold.

#### **Completing a Task**

1

When you have completed assembly of the residential chart, you want to remove this from the Task Queue by changing the status to **Complete.** 

To complete a task, select the task from the Task Queue and click **Complete Task** 🇳 on the toolbar.

2 The Complete task dialogue box will appear with the Completed date and time. Click **OK**. The task will now drop out of the Task Queue.

🕄 Complete task 🗾
* Completed date and time:
19-Mar-2018 🚔 💌 1841 🚔
OK Cancel

## Activity 4.4 – Manage the Prep\Scan Reconciliation Task Queue

Most of the Pre\Scan tasks will automatically be completed as the paper chartlets/documents are scanned into the system.

However, in the cases where they are not automatically dropped out of the Task Queue, you will have to investigate further (i.e. no paper documents received, documents were scanned but didn't have a Facesheet or an "I Have Been Scanned" document).

Of note, if you notice that the **Discharge Date is blank**, that indicates that this encounter has been cancelled and this task can be "Completed".

#### Change the Status of a Task

Select the task you want to change from the list of tasks displayed.

🕑 ProFile: Task Queue													
Task View Help	fask View Help												
🗎 🍓 👶 🚍 🛃 🖶 🚼 🜑 🎬 🖉 🛛 As of 18:45:19 Prep\Scan - Reconciliation 🛛 🛄													
2 5 2 1 <b>p</b> (4													
Filters: Update Date: All D	Filters: Update Date: All Dates / Complete / In Process / Pending / Opened / On Hold												
Name	MBN	Task Status	Task Type	Reason	Task Age Indicator	Update Date	∠ Create Date	Admit Date	Discharge Date	Patient Type			
CSTCORE, TEST	760010001	Pending	Prep\Scan - Reconciliation			2017-Dec-27 10:47:38	2017-Dec-27 10:47:38	2017-Dec-27 10:41:00	2017-Dec-27 10:47:00	Inpatient			
Validate, IP-PHY-One	760000645	Pending	Prep\Scan - Reconciliation			2017-Dec-27 14:16:44	2017-Dec-27 14:16:44	2018-Jan-02 07:45:50	2017-Dec-26 10:00:00	Inpatient			
Validate, NICU-Nurse	760000663	Pending	Prep\Scan - Reconciliation			2017-Dec-28 10:22:00	2017-Dec-28 10:22:00	2018-Jan-02 07:45:54	2017-Dec-28 10:21:00	Inpatient			
Validate, IP-PHY-Five	760000649	Pending	Prep\Scan - Reconciliation			2017-Dec-29 12:07:15	2017-Dec-29 12:07:15	2018-Jan-02 07:45:51	2017-Dec-28 12:07:00	Inpatient			
HIM-PatientOne, Peter	760000949	Pending	Prep\Scan - Reconciliation			2018-Jan-24 11:43:18	2018-Jan-24 11:43:18	2018-Jan-11 05:56:00	2018-Jan-20 11:42:00	Inpatient			
HIM-PatientOne, Jean	760000937	Pending	Prep\Scan - Reconciliation			2018-Jan-24 13:18:15	2018-Jan-24 13:18:15	2018-Jan-11 05:56:00	2018-Jan-11 13:16:00	Day Surgery			
HIM-PatientOne, Myron	760000933	Pending	Prep\Scan - Reconciliation			2018-Jan-24 13:18:50	2018-Jan-24 13:18:50	2018-Jan-11 05:56:00	2018 Jan 11 13:16:00	Day Surgery			
HIM-PatientOne, Stanley	760000929	Pending	Prep\Scan - Reconciliation			2018-Jan-24 13:19:23	2018-Jan-24 13:19:23	2018-Jan-11 05:56:00	2018 Jan 11 13:16:00	Day Surgery			
HIM-PatientOne, Javier	760000917	Pending	Prep\Scan - Reconciliation			2018 Jan 25 08:58:46	2018-Jan-25 08:58:46	2018-Jan-24 05:07:00	2018-Jan-25 08:58:00	Inpatient			
HIM-Coding-Three, Christine	760000906	Pending	Prep\Scan - Reconciliation			2018 Jan 29 10:29:48	2018-Jan-29 10:29:48	2018-Jan-11 05:56:00	2018-Jan-18 10:29:00	Inpatient			
HIM-Coding-Four, Byron	760000907	Pending	Prep\Scan - Reconciliation			2018-Jan-29 12:09:51	2018-Jan-29 12:09:51	2018-Jan-11 05:56:00	2018-Jan-21 12:09:00	Inpatient			
HIM-CODING-FIVE, DOROTHY	760000916	Pending	Prep\Scan - Reconciliation			2018 Jan 29 15:46:21	2018-Jan-29 15:46:21	2018-Jan-11 05:56:00	2018-Jan-30 08:28:00	Inpatient			
HIM-CODING-FIVE, JOANNE	760000912	Pending	Prep\Scan - Reconciliation			2018-Jan-30 09:53:39	2018-Jan-30 09:53:39	2018-Jan-11 05:56:00	2018-Jan-30 09:53:00	Inpatient			

You can change the status by using the Task menu and selecting the status, right-clicking on the selected chart and select the status or by clicking on the buttons on the toolbar. For Pre\Scan Reconciliation, you will only use either **Pass** or **Transfer**.



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#### **Completing a Task**

1

Only Complete a task when the Discharge Date is blank, indicating that the encounter was cancelled.

To complete a task, select the task from the Task Queue and click **Complete Task** 🇳 on the toolbar.

2 The Complete task dialogue box will appear with the Completed date and time. Click **OK**. The task will now drop out of the Task Queue.

🖏 Complete task	<b>—</b>
* Completed date and time:	
19-Mar-2018 🊔 👻 1841	×
ОКС	Cancel

### Passing a Task

You would select **Pass** on a task in the cases where the scanned documents requires someone else to do some further analysis/review.

 $^{10}$  To pass on a task, select the task from the Task Queue and click **Pass on Task**  $^{12}$  on the toolbar.

2 The Pass on task dialog box appears. Select a Pass on task reason and click **OK**. The task is displayed with a task status of **OnHold**.



#### Transferring a Task

In the cases where there were no paper documents associated with a patient's encounter, you would then transfer the task to **QA – Inpatient or QA – Day Surgery** dependent on the Patient Type.

1 To transfer a task from the Pre\Scan Reconciliation Task Queue to the QA Task Queue, select a task from the Task Queue.

🖉 ProFile: Task Queue												
Task View Help												
🚔 🎰 🔶 📁 😰 🖶 🛃 🗶 🦹 🥥 As of 18:45:19 Prep\Scan - Reconciliation												
Filters: Update Date: All Dates / Complete / In Process / Pending / Opened / On Hold												
Name	MBN	ask Status	Task Type		Reason	Patient Type						
Validate, IP-PHY-One	760000645	Pending	Prep\Scan -	Reconciliation		Inpatient						
CSTCORE, TEST	760010001	OnHold	Prep\Scan -	Reconciliation	Scan Reconciliation - Misc Hold	Inpatient						
Validate, NICU-Nurse	760000663	Pending	Prep\Scan -	Reconciliation		Inpatient						
Validate, IP-PHY-Five	760000649	Pending	Prep\Scan -	Reconciliation		Inpatient						
HIM-PatientOne, Peter	760000949	Pending	Prep\Scan -	Reconciliation		Inpatient						
HIM-PatientOne, Jean	760000937	Pending	Prep\Scan -	Reconciliation		Day Surgery						
HIM-PatientOne, Myron	7600009 <mark>3</mark> 3	Pending	Prep\Scan -	Reconciliation		Day Surgery						
HIM-PatientOne, Stanley	760000929	Pending	Prep\Scan -	Reconciliation		Day Surgery						
HIM-PatientOne, Javier	760000917	Pending	Prep\Scan -	Reconciliation		Inpatient						
HIM-Coding-Three, Christine	760000906	Pending	Prep\Scan -	Reconciliation		Inpatient						
HIM-Coding-Four, Byron	760000907	Pending	Prep\Scan -	Reconciliation		Inpatient						
	1											

- 2 Click **Transfer Task** 🧖 on the toolbar.
- 3 The Transfer Task dialogue box will appear. From the Task type list select the new task type (QA-Day Surgery or QA Inpatient). Click OK.

📲 Transfer Task
Patient and Visit Information Name: HIM-Coding-Two, Muriel Admit date: 2018Jan-11 05:56:00 Discharge date: 2018Jan-30 15:18:00 * Task type: QA - Inpatient

Note: The system allows you to transfer tasks in a Pending and On Hold status.



## Activity 4.5 – Add Encounter or Notes to a Task

- 1 To add an encounter or task note to a task, select a task from the queue.
- 2 Right-click and select **Notes** > **Encounter Notes** or **Task Notes**.

Task view riep									
≟ 💐 🌷 🗖 😰 🖻 🔁	😑 🎽	Z	As of 16:4	1:28 All Task	Types				
2 🕒 2 🖻 Р 🕷									
Filters: Update Date: All Date	s / Compl	lete	/ In Process	: / Pending / O	pene	d 7 I	)n Hold		
Name	MBN	1	Task Status	🛆 Task Type	Rea	son		User	
CSTPRODHIM, WILMADEMO	70000177	) Or	hHold	For Review	Anal	vsis -	For Training Review	SYSTEM.	, Sʻi
CSTPRODHIM, WILMADEMO	70000177	0	hHold	For Review	Anal	vsis -	For Review	SYSTEM.	, S'i
CSTPRODHIM, WILMADEMO	700001		0				For Review		
CSTPRODHIM, RULES DAYCARE	7000000		Open			vsis -	For Review	Schneide	r, N
CSTPRODHIM, SALLYDEMO	7000000		Consolato					SYSTEM.	, Sʻi
CSTPRODHIM, WILMADEMO	700001		complete			sis -	For Review	TestUser,	, Cl
CSTPRODHIM, WILMADEMO	7000011		Remove			isis -	For Review	TestUser,	. Ck
CSTPRODHIM, UTTESTPATIENT	7000000		Pass			vsis -	For Training Review	TestUser,	. Ck
			Donding						
			rending						
			Create Addit	ional Task					
			Transfer						
			Noter				Encounter Noter		1
		-	Notes				Encounter Notes		
			Tack Details				Task Notes		

- 3 The **Note View Form** is displayed. Enter the note in the **Contents** pane.
  - o If necessary, select the Permanent Note.



4 Click Save 🗟, then Exit 🌌 on the toolbar.

	Dote View Form	I	
1	Notes for For Review task:	Contents:	
		Test	

5 View the note in the **Notes for Review Task** pane.

## **Activity 4.6 – Previewing and Printing Reports**

- **1** From the View menu select **Options**. The Options window is displayed.
- 2 Click the **Printing** tab and select **Print Detail Report** or **Print Summary Report**. Click **OK**.

l c	Printing Into				
	<ul> <li>Printing Report</li> </ul>		Page Orientation		
	Print detail report				
			Portrait (132 ch	aracters]	
	Print summary re	port	🔘 Landscape (160	) characters)	
	Prompt for report	type			
	🔽 Group bu facilitu				
	MRN Task Status Task Type	MRN Task Status Task Type		15 11 15	
	Reason	Reason		25	
	User	User		25	
	(				

<sup>3</sup> To preview the report click **Print Preview** and the toolbar.



The Detail Report will look similar to this.

Report Output - preview_11_16_2017_01_36	,56.tmp								
3 3 R A B B B 0 0 2	🕼 🔍 🔍 150%	- 📲							
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									0
SPOON								PAGE	1
			Him Task Repor	t - Detail					
			15/11/	17					
Organizations - LGH Lions	s Gate Hospital								
Date Range -									
Statuses - Complete, In 1	Process, Pending,	On Hold, O	pened						
Tasks - Assembly - Reside	ential, For Revie	w, Prep\Sca	n - Reconciliatio	n, QA - Da	y Surgery,	QA - Inpatient			
Name	MRN	Task Statu	s Task Type	Create Da	Discharge	Patient Type	Facility		
CSTPRODHIM, WILMADEMO	700001770	OnHold	For Review	01/06/17	19/01/17	Inpatient	LGH Lions Gate		
CSTPRODHIM, WILMADEMO	700001770	OnHold	For Review	09/06/17	19/01/17	Inpatient	LGH Lions Gate		
CSTPRODHIM, WILMADEMO	700001770	OnHold	For Review	09/06/17	19/01/17	Inpatient	LGH Lions Gate		
CSTPRODHIM, RULES DAYCAR	70000065	OnHold	QA - Day Surger	24/05/17	09/05/17	Day Surgery	LGH Lions Gate		
CSTPRODHIM, SALLYDEMO	700000378	Pending	QA - Day Surger	24/05/17	14/05/17	Day Surgery	LGH Lions Gate		
CSTPRODHIM, WILMADEMO	700001770	OnHold	QA - Inpatient	24/05/17	19/01/17	Inpatient	LGH Lions Gate		
CSTPRODHIM, WILMADEMO	700001770	OnHold	QA - Inpatient	24/05/17	19/01/17	Inpatient	LGH Lions Gate		
CSTPRODHIM, UTTESTPATIEN	70000023	OnHold	QA - Inpatient	24/05/17	28/03/17	Inpatient	LGH Lions Gate		
Complete:991 In Proces									
comprese.ssi in rises.	ss:0 Pending:	On Hold	:7 Opened:0						
comprese.ssi in ribee.	ss:0 Pending:	On Hold	:7 Opened:0						
	ss:0 Pending:	On Hold	:7 Opened:0						,



The Summary Report will look similar to this.

Report Output - preview_03_20_2018_02_29_36.tmp							
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TRAIN.HIMCLERK8							
		Him Task Report - Summar	Y				
		19/03/18					
OrganizationsAll Organ	izations-						
Date Range -							
Statuses - Complete, In Pr	ocess, Pending, O	n Hold, Opened					
Tasks - Prep\Scan - Reconc	iliation						
LGH Lions Gate Hospital							
Prep\Scan -	Reconciliation						
	OnHold	2					
	Pending	32					
		TOTAL 34					

**4** To print directly from the report preview click **Print** is on the toolbar.

• You can also click **Print**  $\stackrel{\text{def}}{=}$  from the toolbar of the Task Queue.