WORKPACKAGE CST Transformational Learning N97

# Health Information Management: Clerk IV Release of Information

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#### ACTIVITY 1 – AccessHIM

#### Learning Objectives

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

- Open the Request Management Perspective
- Configure and Save the Display of Perspective Views
- Open a View
- Configure Requester Defaults
- Search for a Requester
- Add a Requester
- Modify a Requester
- Delete a Requester
- Create a New Request
- Search for a Request
- Retrieve, View, and Modify a Request
- Add, View and Delete a Note
- Add, View and Delete a Hold
- Print a Mailing Label
- Print a Cover Letter from AccessHIM
- View Request History

#### <u>Overview</u>

AccessHIM Request Management is the *Cerner Health Information Management* Release of Information (ROI) application and is used to enter and track all requests for patient records.

The Request Management perspective logs a request into a queue where it waits to be processed and records the pertinent data for the request. In the Request Management perspective, the Request Queue view is used to inquire about existing requests and their status. You can check on the progress of an entered request or make modifications to it. You can also view a list of a particular requestor's requests or a list of all requests made for a particular patient's records.

### Activity 1.1 – AccessHIM Login

From the Citrix StoreFront, select the AccessHIM icon.



2 You will be prompted to login, enter User Name, Password and click OK.

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# Activity 1.2 – Setting Access HIM General Preferences



- 2 Expand **General** in the navigation pane on the left. Click Non-Patient Perspectives.
- 3 Click on the drop down box under **Default Non-Patient Perspective**, select **Request management.**
- 4 Move any items not required in Selected Non-Patient Perspective box by clicking on the item and using the arrow key back into the available non-patient perspective box. The Selected Non-Patient Perspective box should only have Request Management.

Refer to image below.

8	Preferences	- 🗆 🗙
type filter text	Non-Patient Perspectives	⇔ • ⇔ • •
Coding Debug Settings General Patient Perspective Legay Taxas Legay Taxas Legay Taxas Person Locks Physician Relation Request Management Taxas.Coor History Workist	Default Non-Patient Perspective Request Management v Available Non-Patient Perspect CAC Rule Builder My Worklow Person Locator Registration Services Task Quove	Selected Non-Patient Perspect
< >		Restore Defaults Apply
		OK Cancel

Click Apply.

5



# Activity 1.3 – Setting Request Management Preferences

- 1 Expand **Request Management** in the navigation pane on the left to set the following preferences:
- 2 Select **Invoice** to de-select the following prompts to apply, as we will not be creating invoices through AccessHIM:
  - a. Prompt to complete a request when the invoice balance is paid in full.
  - b. Prompt to update the billing date when printing an invoice with an outstanding balance.
  - c. Prompt to confirm the status change when a request with an outstanding balance is completed, cancelled, or rejected.
  - d. Prompt to generate a page count from XR if a pre-bill request is saved



4 Select printers to select a Letter printer, an Invoice/Report Printer, and a Label Printer from the respective lists. Click **Apply**.

Preferences			
type filter text	Request Queue	← → → → →	
<ul> <li>Coding</li> <li>Debug Settings</li> <li>General</li> <li>Legacy Tasks</li> </ul>	Refresh Automatically refresh the Request Queue. Refresh Rate (1 - 9999)		
Locator Person Locks Physician Relation	5 (A) minutes		
<ul> <li>Request Management Invoice</li> </ul>			
Printers Report Request			
Accession Search Distribute			
Release Subject			> Printers
Template Visits Request Queue			Letter Printer:
<ul> <li>Task Queue</li> <li>Transaction History Worklist</li> </ul>			Invoice/Report Printer:
		Restore Default Apply	Label Printer:
		OK Cancel	

5 Select **Request Queue** to select whether to automatically refresh the **Request Queue** and select frequency of refresh. Select 5 minutes. Click **Apply** and Click **Ok**.

Preferences		
type filter text	Task Queue	$\Rightarrow \Rightarrow \Rightarrow \bullet$
<ul> <li>Coding Debug Settings</li> <li>General Legacy Tasks Locator Person Locks Physician Relation</li> <li>Request Management</li> <li>Task Queue</li> <li>Transaction History Worklist</li> </ul>	Refresh Automatically refresh the Task Queue. Refresh Rate (1 - 9999) 5 $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	estore Defaults
	R	oK Cancel



# Activity 1.4 – Open the Request Management Perspective

1 From the View menu, select Open Perspective, Request Management.

Acce	essHIM - Tas	k Queue			
File Vi	ew Task	Help			
	Open Per	spective	• 🚨	My Workflow	
····· 🤄	Open Vie	w	- 🍒	Person Locator	
23	Perspecti	ve Layout	- 🖌 🖴	Registration Services	
				Request Management	
	Task Type	Task Status	Rea 👘	Task Queue	FIN
2					

2 The Request Management perspective displays. The Request Management perspective is comprised of nine Views that are divided in three panes:

- Pane 1 Request, Invoice, Notes, Holds, XR Template, XR Distribute
- Pane 2 Request Queue
- Pane 3 Requester, Requester Defaults

File View Tark Hele		Accessi	HIM - Kequest Man	igement						EN Englis	h (Canada) 🛛 Help	
Search by Name A I P Patient N - 1	2											
Request S Invoice S Notes Holds XR Template R XR Distribute	-+ N G O & + " = 🏹	Request Queu	Je									@ @ • <sup>-</sup> -
Request Number Request Type Facility B	equester											Last Updated:
	Q R	lequester		Patient			Rec	quest Numb	er	Tracking	ID	
				۹. –			۹. –					
	,	Additional S	Search Criteria									
		A Search	Save Search as Defau	It Load Defaults	Clear Defaults							
Li Li	ast Updated By	Print	Request Request Typ	Patient Name	Hold N	ote Requester	Facility	Status	Report Request Status	Request Date/Time	Required Date/Time	Days Overdue
	Q.	Requester	🕼 Requester Defaults	3							+ % 6	10 <b>8 - 1</b>
	R	lequester										
					] 🔍							
		Requester In	nformation				Ein	rt Name				
		ascivalite/ of	rganization ivanie					screening				
	R	lequester Sour	rce									
					~							
	D	elivery Metho	od		Reque	st Reason			. Fina	cted Turnaround Dav		
		Authorizatio	on Required						- Cope			
		Billable			Pre	-Bill						
		Invoice Defa	aults									
	,	Contact Info	ormation									
**												

### **Configure and Save the Display of Perspective Views**

- 1 Users can configure the display of these views by using the drag-and-drop operation to move the views to a different location on the screen.
- 2 To save configured views, select View > Perspective Layout > Save. The Save Perspective Layout message window is displayed.

File Vie	i um - nequest Managen	nent
The Vie	/ Task Help	
Sea	Open Perspective	🕨 🖥 Patient 🛛 😤 🔫
····· 🔁	Open View	🕨 tes 💷 Holds 🛛 🕄 XR Template 💭 XR Distribute
<b>22</b>	Perspective Layout	Restore
		Save
<u> </u>	+ 6 0 8	Reset
	Hold Reason	Save Configuration
	Tiola Reason	Reset Configuration
E		
Sava	Perspective La	wout
Juve	r crspective eu	your
(	Perspec	tive layout successfully saved.
		OK
		ÖK
Click	ок.	
Click	OK.	
Click	ок.	Note: To display a view on the entire

te: To display a view on the entire screen, double-click the heading of the view and click the Maximize button.

To restore the display, double-click the heading of the view or click the Restore button

### **Open a View**

1 To open a particular view, click the view in the Request Management perspective or select



Open View from the View menu.

2

Select the view to open. The select view opens. The selected View tab will be highlighted in light blue.

File Vi	ew Task Help		
Sea	Open Perspective	• 目 P	atient 🛛 🥐 🖝 🗾 📓 🍕
6	Open View	<ul> <li>•</li> <li>•</li> <li>•</li> </ul>	Holds
F	Perspective Layout	• 😔	Notes
	Request Number	2	Request
5			Invoice
		0	Request Queue
		6	Requester
		6	Requester Defaults
			XR Distribute
			XR Template

# Activity 1.5 - Search for a Requester

1

To search for a requester, open the Requester view.

🤢 Request Queue				2	2 6	a +	Ð	
🔽 Requester 🔐 Requester Defaults	÷	۹.	ß	a	0	X	-	٦
Requester         • Requester Information         • Invoice Defaults         • Contact Information								

2 Enter the name of the requester in the Requester field and click the Search button to search for the requester in the database.

Requester 🥻 Requester Defaults				* % 13 61 0 1
Requester	$\sim$			
ICBC				
requester an ormation				
Last Name / Organization Name		First Name		
Requester Source				
Delivery Method	Request Reason			
	-		<ul> <li>Expected Turnaround Days</li> </ul>	
Authorization Required				
Billable	Pre-Bill			
Invoice Defaults				

3 The Expanded Requester Search dialog box displays. Requesters with a match will display under the Requester.

_	Requester Name		Requester	🕂 Add					-	-		
	ICBC		Ne			P.	aurostas Causas	Perment Person	CON	MON	Canadau	
	Requester Source		10	C New Wester	inister	Ter	quester source	Insurance Claim	DOIN	IVITAIN	Gender	Date
		-		C, New Westm	inister unver - Ecolana	ins le Inc	surance Company	Insurance Claim	-			
	Request Reason	_ /	ICE	SC, North Vance	ouver - Llovd	Ins	surance Company	Insurance Claim				
		F	ICE	BC, Penticton		Ins	surance Company	Insurance Claim				
	State	<b>_</b> \	ICE	C, Port Alberni		Ins	surance Company	Insurance Claim				
		-	101	C Dowell Diver		Inc	Company	Incurance Claim				
	Zip Code		Addresso	1								-
	MPN		Туре	Street Addre	Street Ad	dress 2	Street Address 3	Street Address 4	City		s	tate
			Business	Attention	151 Espla	nade W			Nor	th Vanco	ouver B	ritish Colur
	SSN											
	Date of Birth		-									
			-									
	Gender		•									
		•	Phone Nu	imber(s)								
	Search Clear		Type F	hone Number	Extension (	ontact						
	Search Additional											
	Search Persons											
	Search Organizations											

- 4 In the Expanded Requester Search, you can search for the requester by Requester Name, Requester Source, Request Reason, State, and Postal Code or by Postal Code. Click Search.
- 5 If requester found, click on the requester to highlight and click Select to select the requester.



Requester Name	Reque	ter	+ Add									
ICBC			• • • • •									
Requester Source		Nan	ne			Req	uester Source	Request Reason	SSN	MRN	Gende	r Date of I
	- 📖	ICBO	C, New Westmin	nister		Insu	irance Company	Insurance Claim				
D	-	ICBO	C, North Vanco	uver - F	Esplanade	Insu	rance Company	Insurance Claim	_			
Request Reason		ICBO	, North Vanco	uver - l	loyd	Insu	irance Company	Insurance Claim				
-	•	ICDO	, rendeten			Incu	rance Company	Insurance Claim	-			
State	_	ICBC, Port Alberni				Insu	irance Company	Insurance Claim				
	• •		Demail Proof			leeu		Incurance ( Inim				۱.
Zip Code	Addres	is(es)	)									
MRN	Туре		Street Address	1 St	reet Addres	s 2	Street Address 3	Street Address 4	City			State
	Busin	ess	Attention		1 Esplanad	e W			Nort	th Vanco	ouver	British Colur
SSN												
Date of Birth												
Gender	•											
Gender	<ul> <li>Phone</li> </ul>	Nun	nber(s)									
Search Clear	Туре	Pł	one Number	Extens	sion Cont	act						
Consult And different												
search Additional												
Search Persons												
Search Organizations												

# Activity 1.6 – Add a Requester

1

To add a requester, open the Requester view.

Requester				
minnie mouse				
Last Name / Organization Name	Firs	t Name		
Requester Source				
	<b>*</b>			
Delivery Method	Request Reason			
	<b>•</b>	<ul> <li>Expected Turnaround D</li> </ul>	lays 0	
Authorization Required				
Billable	Pre-Bill			
<ul> <li>Invoice Defaults</li> </ul>				
Contact Information				

3 If no requester found, the Expanded Requester Search window will appear, click the Add button.

	Search for a Requester				
1	No requesters found.				
1	Requester Name		Reque	ste 🕂	Add
-	minnie mouse			N	Deserved
	Requester Source			Name	Requester S
		•			
	Request Reason	_			
	State	•			
		•			
	Zip Code	_	Addres	is(es)	
	MRN		Туре	Stree	t Address 1
	SSN				
	Date of Birth				
			-		

Note: It is also possible to add a new requester by clicking the Add Requester button in the upper-right corner of the Requester view.

Requester	9		
<ul> <li>Requester Information</li> </ul>			
Last Name / Organization Name		First Name	
Requester Source			
	· ·		
Delivery Method	Request Reason		
			<ul> <li>Expected Turnaround Days</li> </ul>
Authorization Required			
Billable	Pre-Bill		
Invoice Defaults			
<ul> <li>Contrast Information</li> </ul>			

- 4 The Expanded Requester Search dialog box closes.
- 5 In the Requester view, expand the Requester Information composite.

🔓 *Requester 🤇 🤹 Requester Defaults			
Requester			
		First Name	
Mouse		Minnie	
Requester Source			
Patient-Self 🔹			
Delivery Method	Request Reason		
Mail 👻	Patient/Personal	-	Expected Turnaround Days 42
Authorization Required     Billable	Pre-Bill		
Invoice Defaults			
Contact Information			

Enter Requester Name / Organization
 <u>Note:</u> Combined names will be recorded as it appears on request – hyphens and spaces do not affect search capabilities (e.g. Jones Smith, JonesSmith or



Jones-Smith).

Do not place "Dr." in front of the physician's first name field – the Requester Source will indicate whether a requester is a health care provider or a personal request

Business names will not be abbreviated except for those on an ROI Approved Business Acronym List (see chart below).

Acronym	Business Name
BCCA	BC Cancer Agency
BCCDC	BC Center for Disease Control
BCEHS	BC Emergency Health Services
BCMHSUS	BC Mental Health and Substance Use Services
BCNU	BC Nurses Union
BCIT	British Columbia Institute of Technology
CLBC	Community Living BC
CVAP	Crime Victim Assistance Program
FVCDC	Fraser Valley Child Development Centre
HEU	Hospital Employees' Union
IIOBC	Independent Investigations Office of BC
ICBC	Insurance Corporation of BC
MCFD	Ministry of Children and Family Development
RBC	Royal Bank of Canada
RCMP	Royal Canadian Mounted Police
SFU	Simon Fraser University
UBC	University of British Columbia
UVic	University of Victoria
VACFSS	Vancouver Aboriginal Child & Family Services Society
VIDC	Vancouver Infectious Disease Centre
VPD	Vancouver Police Department

• Select a Requester Source

- If the Requester Defaults have been previously configured for the Requester Source, the defined defaults are populated.
- If the Requester predefined settings have not been previously configured or require updating, click Modify icon
- Delivery Method, Request Reason, Expected Turnaround Days, Authorization Required and Billable.

Note: For requesters with multiple addresses (i.e. ICBC, RCMP), each requester will be entered as a separate Requester.



E.g. ICBC, Vancouver – Broadway ICBC, Vancouver - Kingsway 6 Expand the **Contact Information** composite. To add an address, click the **Add Address** button in the Address Organizer section.

Re	quester
	Proventer Information
La	st Name / Organization Name
N	Aouse
Re	quester Source
P	atient-Self
De	livery Method
N	Aail
V	Authorization Required
	Billable
•	Invoice Defaults
•	Contact Information
A	ldress Organizer

7 In the Address Details section, select an Address Type (Only BUSINESS to be used).

▼ Address Details				
Address Type	Business	~		

<sup>8</sup> Enter the **Address Information** and click **OK**.

Note: Follow EMPI Standards for Patient and Address Entry.

#### Common Address Scenarios:

Typical Patient Address:



ь	
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▼ Address Detail	ls
Address Type	Business V
Street Address 1	123 Main St
Street Address 2	
Street Address 3	
Street Address 4	
City	Vancouver
State	British Columbia 🗸 🗸
Zip Code	A8A 9F9
Country	Canada 🗸
ОК	Cancel

#### Business Address with Attention to:

<ul> <li>Address Detai</li> </ul>	ls
Address Type	Business v
Street Address 1	Attention: Respiratory Clinic
Street Address 2	4399 Wayburne Dr
Street Address 3	
Street Address 4	
City	Burnaby
State	British Columbia 🗸
Zip Code	V5G 3X7
Country	Canada 🗸
ОК	Cancel

Note: It is important that you update any existing business addresses with any applicable "Attention to:" PRIOR to adding the request, as this needs to be saved before entering the request in order for the request to be updated.

Address with Attention to and PO Box:

	✓ Address Details					
	Address Type	Business 🗸				
$\longrightarrow$						
	Street Address 1	Attention:				
$\longrightarrow$						
	Street Address 2	PO Box 12345				
$\rightarrow$						
	Street Address 3	4500 Oak Street				

#### Some Examples from EMPI Guidelines:

#### Example 1: Domestic Address

• 10-2202 Cornwall Ave Vancouver BC

- 1145 Kingsway Vancouver BC
- 439 11TH St E North Vancouver BC
- 405 North Rd Coquitlam BC
- 10-123 Main St NW Montreal QC
  - \*\* **NEVER** truncate city name like "N. Van"
  - \*\* Do NOT enter like "#10-2202 Cornwall Ave"
  - \*\* Do NOT enter like "East 11th Street"

#### **Rural address examples**

- 2765 7th Concession, RR 8 Stn Main Millarville AB
- 4145 Steward Rd, PO Box 4001 Stn Yarrow Main Chilliwack BC

#### Example 2: US Address

- 4417 Brooks St NE Washington DC US
- 200 Madison Suite 2300 Chicago IL US

#### Example 3: Foreign Address

- 2-2-29 Raidencho Kounosu Saitama JP
- Stotsmarken 18 DK-2970 Horsholm DK
- 138 Tiyu Road E Tianhe District Guangzhou CN
- 9 The address is displayed in the **Address Organizer** table.

Address Organizer	•									
🛤 🛒 😹										
Туре	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City	State	Country	Zip C	Bill To	Mail To
Business	123 Main St				Vancouver	Britis	Canada	A8A		

- 10 Select the address that is the mailing address in the Address Organizer table. Select the **Mail To** option.
- 11 If different, select the address that is the billing address in the Address Organizer table. Select the **Bill To** option.

<ul> <li>Contact Information</li> <li>Address Organizer</li> <li>M M</li> </ul>									$\checkmark$	$\checkmark$
Туре	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City	State	Country	Zip Code	Bill To	Mail To
Mailing	231 15th St E				North Vancouver	British Colu	Canada	V7L 2L7		
Billing	Attention: Mickey Mouse	4500 Oak Street			Vancouver	British Colu	Canada	V6H 3N1		

12 To add a phone number to an address, select the address in the Address Organizer table. Click the Add Phone Number button in the Phone Organizer section. Select the address to view the phone number associated to the address. T



			Street Address 4	City	Juic	Country	Zip C	DATTO
Business	123 Main St			Vancouver	Britis	Canada	A8A	
1								
L				1		1		

The phone number field is a mandatory field which users will enter (555) 555-5555. Please enter the international phone number in the Contact field.

Anup: Please update the ROI Workbook (page 15) to include the above information.

13 In the **Phone Details** section, select a **Phone Type** 

- Phone Numbers: Use **BUSINESS** ONLY
- Fax Numbers: Use FAX BUSINESS ONLY

14	Enter the Ph	none Number and click OK.
	<ul> <li>Phone Details</li> </ul>	
$\rightarrow$	Phone Type	Business v
$\rightarrow$	Phone Number	(604)988-3131
	Extension	
	Contact	
	ОК	Cancel



**NOTE 1**: For person/non-business requestors (i.e. patient), use the **Contact** field to identify what the Business phone is if known, such as Home Phone or Mobile Phone.

**Note 2: For International Numbers –** in the **Phone Number** field add *555-555-5555* and then enter the international phone number in the **Contact** field.

15 Enter any additional phone / fax numbers, as applicable. Click **OK**.

16 The phone numbers / fax number will display in the **Phone Organizer** table.

Phone Organizer							
				1	1		
Type Ph	hone Number	Extension	Contact	Billing Phone	Mailing Phone	Billing Fax	Mailing Fax
Business (60	04)988-3131						



1

To save the requester, click the Save Requester button *in the upper-right corner of the requester view.* 

### Activity 1.7 – Modify a Requester

To modify a Requester, search and select the requester and click the **Modify Requester** button  $\searrow$  in the upper-right corner of the Requester view.

ĺ	🧟 Request Queue	2 G + F 🗆
Í	ঝ *Requester 🌀 Requester Defaults	+ 🕥 🗈 🖬 🦉 🗰 🗆 🗖
	Requester	Modify Requester

2 Enter the updated information.

#### Modify an Address

- To modify an address, select the address in the Address Organizer table to modify and click the **Modify Address** button.
- Enter the updated information and click **OK**.

				<ul> <li>Address Detail</li> </ul>	s
				Address Type	Business v
				Street Address 1	4563 Sunset Dr
				Street Address 2	
				Street Address 3	
				Street Address 4	
				City	Vancouver
	Address Organizer			State	British Columbia 🗸
			$\rightarrow$	Zip Code	A8A 9F9
	Туре	Street Address 1		Country	Canada 🗸
$\rightarrow$	Business	123 Main St		ОК	Cancel

#### **Remove an Address**

- To remove an address, select the address in Address Organizer table to remove and click the **Remove Address** button.
- The Remove Address dialog box displays. Click **Yes** to remove the address.



Image: Street Address 1	<b>—</b>
Type Street Address 1	
Type Street Address 1	associated phone numbers?
Type Street Address T	
Business 123 Main St	Yes No

Note: If an address is removed it will remove its associated phone number.

#### Modify a Phone Number

- To modify a phone number, select the phone number in the Phone Organizer table to modify and click the **Modify Phone Number** button.
- Enter the updated information and click **OK**.

				Phone Organizer	,
				III III III	
				Туре	Phone Number
				Business	(604)988-3131
	Dhana Ormaniaan			Phone Type	Business
	Phone Organizer			Phone Number	(604)988-3131
			$\longrightarrow$	Extension	12345
	Туре	Phone Number	_	Contact	
$\rightarrow$	Business	(604)988-3131		ОК	Cancel

#### **Remove a Phone Number**

- To remove a phone number, select the phone number in the Phone Organizer table to remove and click the **Remove Phone Number** button.
- The Remove Phone Number dialog box displays. Click **Yes** to remove the phone number.

Phone Organizer	
Туре	Phone Number
Business	(604)988-3131



<sup>3</sup> Click the Save Requester button  $\mathbf{\overline{M}}$  in the upper-right corner of the Requester view.



1

# Activity 1.8 Delete a Requester

To delete a requester, click the **Delete Requester** button <sup>ise</sup>in the upper-right corner of the Requester view.

ঝ Requester 🕼 Requester Defaults	+ 💊 🗈 🖬 🖉 😽
Requester	_
Mouse, Minnie 🔍	

2 The Delete Requester dialog box displays. Click **Yes** to delete the requester.





### Activity 1.9 – Create a New Request

To create a new request, open the Request view. Select the Add Request button 📩 in the upper-right corner of the Request view.



1

Select the appropriate request type from the Request Type list.



3 Select the appropriate Main Facility from the Facility list.



4

Enter the name in the Requester field and press ENTER, or click the Search button.

Requester	$\sim$
* mouse	

The Requester Search dialog box displays. If not previously entered, enter the appropriate 5 search criteria into the Requester Search dialog box and click Search.

Requester Name	Reques	ter											
mouse		Name	Requester Sou	irce 1	Request Reason	SSN	MEN	Gend	er (	Date of E	Birth	Age	
Requester Source		Mouse, Minnie	Patient-Self	- 21	Patient/Personal								
v Result Rescue													
Request Reason													
State													
-	Addres	s(es)											
		Church & distance	1. (Broad 5.6.6		Parast Subdame 2	-			-	faute			A
$\smile$													
	Phone	Number(s)											
	Туре	Phone Numbe	a Extension	Conta	ĸt								
	Phone Type	Number(s) Phone Numbe	u Extension	Conta	ıđ								

Select the appropriate requester, select address, and click Select. 6

		Requeste	er 🕂 Add										
CSTPRODHIM, SALLYDEN	10	N	ame		Requester	Source	Request	Reason	SSN	MRN	Gender	Date of Birth	Aa
Requester Source		C	STPRODHIM, SAL	LYDEMO	Patient-Se	lf	Patient/F	ersonal					
Request Reason	$\rightarrow$												
State	~												
Zip Code	~	Address(	es)										
MRN		Туре	Street Addres	1 Street	Address 2	Street /	Address 3	Street A	ddress	4 Cit	у	State	
	<u> </u>	Busines	is 123 Main St							Va	ncouver	British Columb	ia
SSN													
Date of Birth													
Gender	~	Phone N	umber(s)										
Search	Clear	Туре	Phone Number	Extension	Contact								
Search Additional													
Search Persons													
Search Persons													

In the Patient Information composite, enter a patient's name in the Patient Name box and click the Search button.

lequest Number	Request Type
<new request=""></new>	Non Continuity of Care

7

If you have the MRN, you can click on the Search button and the Person Search window will appear and you can enter any of the person search parameters to find for your patient. Click **Select.** 

	Person									
MRN	Name		MRN	CMRN	Birth Date	Sex	Age	SSN D	eceased	
700002849	CSTPRODH	M, CHERRY	700002849		)3-May-1966	Female	51 Years	$\leftarrow$	_	•
50										
Birth Date										
Sex 🗉	1									
	•									
Fin Nbr										
	_									
Search Clear										
	Encounter									
	Fin Nbr	Facility	End	counter Type	e Registratio	on Date	Dischar	ge Date	Attending Phy	sician
	7000000011252 700000004536	LGH Lions	Gate Inp Gate Dat	atient ta Storage	02-Oct-20 03-May-2	17 12:54 017 11:52	03-Oct- 03-May	2017 9:54 -2017 23:5	Plisvcb, Stuart 9	MD



Note: If the ROI request is for more than one encounter, select the most recent encounter.

The patient and	he patient and selected encounter or encounters are displayed in the list.										
Patient Name: CSTPR	ОДНІМ, СН	RISTINA	Sex: Female								
Date of Birth: Jan 17, 1	D AM	Privacy Stat	us:								
Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Attending Physician						
CSTPRODHIM, CH	700009314										
1		Dec 1, 2017 8:09	Dec 2, 2017 2:23	7000000	Inpatient	Plisvcb, Stuart, MD					

9 If you are releasing any documentation outside of Cerner i.e. paper records/non-Cerner systems, select the check box next to **Free Text** under **Paper Documents.** 

No notes should be entered as this information is already captured on the ROI authorization form/request.



10 The Requester information is populated in the Delivery Information and Address Information composite. In the Delivery Information composite, select a Delivery Method from the list.

Select Pre-Bill for any flat rate or money we received and Billable for any money required above the flat rate.

<ul> <li>Delivery Information</li> <li>Delivery Method</li> </ul>	$\checkmark$	$\downarrow$
Mail	🚽 🔲 Billable	Pre-Bill
Fax	A	
Mail		
On Site Review	- :t Address 3	Street Addres
Patient Portal	=	
Pick-up	<b>v</b>	

Note: The Billable and Pre-Bill check boxes must be checked in order to produce an invoice within Access HIM Request Management. The two letters that require the invoice to be created are: Invoice Cover and Pre-Payment letters.

11 In the Address Information composite, if more than one address exists for the requester, select which address to Print the mailing label to in the Address Information table.

	▼ Add	ress Infor	mation									
	Print	Bill To	Mail To	Туре	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City	State	Country	Zip Code
≻	0	V	V	Business	1234 Susnset Dr				Kansas City	Missouri	United States	65111

The Accounting Disclosure (AOD) box is always selected by default. Always uncheck this box.
 Accounting of Disclosure

$\rightarrow$	AOD Required			
	Purpose		Description	
	*	^ v	*	*
_	Accounting of Disclosure			

13 In the Request Information composite, select a **Request Reason** from the list if not already populated.

<ul> <li>Request Information</li> <li>Request Reason</li> </ul>		
Patient/Personal	-	1
Patient/Personal		1
Patient Transfer		
Quality/Chart Review	_	
Research/Clinical Trials		
Secure Records	Ŧ	

14 If the Authorization Required option is selected, select whether it is authorized or not in the Authorization Required list.

$\rightarrow$	Authorization Required
	Authorized 🗸
	Authorized
	Implied Consent Not Authorized

15 If Authorized or Implied Consent is selected, select a status from the Request Status list if not already populated.



Request Status	
Logged	-
Cancelled	*
Complete	_
Invoiced	E
Logged	
Processing	<b>.</b>

16 If Not Authorized is selected, the Request Status box automatically populates with a status of Access Denied/Rejected. Select a reject reason from the Rejection Reason options.

	n	Authorization Required	(	Request Status	
Quality/Chart Review	<b>▼</b>	Not Authorized		Access Denied/Rejected	
Rejection Reason		Request Date		Request Time	
* 📄 Chart Unavailab	e to Provide 📃 🔺	1/15/17		17:00	
📃 Duplicate Reque	st 🗏	Required Date		Required Time	
FIPPA Restrictio	1			00:00	
Invalid Authoriz	tion	Days Overdue:			
		· · ·			

- Note: Once a request has been placed in rejected status, it cannot be changed. The rejection reasons will not be populated on the ROI letter; however, it is only viewable within AccessHIM Request Management.
- 17 Enter the Request Date (date request received) and a Required Date, if one is provided.

Request Date	Request Time	
1/15/17	 17:00	•
Required Date	Required Time	
	 00:00	*

- 18 If a paper chart is required, refer to the Patient Information Request module. Do not use the Link to Patient Information Request option within AcessHIM.
- 19 Click the Save Request button in the upper-right corner of the Request view to save the request.



20 Once saved, the request is grayed-out and the Request Number is available. Write the Request Number on the paper request for future reference.

Request Number	Request Type	Facility	Requester	
271281424	Non Continuity of Care	- LGH Lions Gate Hospital	Mouse, Minnie	G.

#### **NON-ROI REQUEST TYPES:**

For non-ROI requests (see list below), complete the steps outlined below to enter these request types.

Request Type		
Amend Record	-	*
Continuity of Care		
Non Continuity of Care		
Request to View Record	=	
————————————————————————————————————		
	Ψ.	

The data requirements are the same for these four request types.

webnest Dia monce ico words Di words	🔝 XR Template 🔛 XR Distribute					+ % 🖬 🖉 🔅 • '
Request Number		Request Type		Facility	Requester	
<new request=""></new>		Amend Record		1	• • •	٩
Patient Information     Patient Name						
Tracking ID						
ж						
Patient Nome	MRN		Date of Birth	Sex	Privacy Status	
Patient Information on Site   Request Information  Resurved Status						
Logged	~					
Rejection Reason						
Duplicate Reguest     PIPPA Restriction     Patient Not Seen     Record Destroyed						
		Request Time				
Request Date		12-02-014	10			
Request Date 2/22/18						
Request Date 2/22/18 Required Date		Required Time				

- Amend Record Request to modify information contained in a patient's record. Modifications
  include adding information, deleting information, or correcting erroneous information.
- **Request to View Record** Request to view a patient's record.
- Restrict Consent Request made by a person to restrict the access or consent privileges of another person (such as a physician or family member) or an organization.
- Secure Record Request made by Risk Management to secure a record.
  - a. To create a new request, open the Request view.
  - b. Select the Add Request button in the upper-right corner of the Request view.
  - c. Select the request type from the Request Type list.
  - d. Select the appropriate Facility from the Facility list.



- e. Enter the requester in the Requester field and press ENTER, or click the Search button.
- f. Select the appropriate requester and click Select.
- g. In the Patient Information composite, enter a patient's name (last name, first name) in the Patient Name box and click the Search button. Select the appropriate patient.
- h. Click Select.
- i. Select the appropriate Request Status from the list.
- j. Enter a Required Date and Time.
- k. Click the Save Request button in the upper-right corner of the Request view to save the request.

### Activity 1.10 – Search for a Request

1 To search for a request previously entered, open the Request Queue view.

😡 Request Queue

2 Enter the appropriate criteria in one of the following fields:

- Requester: Uses Requester Search to search for requests by entering a requester.
- Patient: Uses Patient Search to search for requests by entering the name of a patient.
- Request Number: Searches for a request by entering a request number.
- Tracking ID: Searches for a request by entering a tracking ID (found on chart tracking label).
   Click the Search button Search

Request Queue						_				2 G •
$\mathbf{V}$		$\mathbf{V}$				$\mathbf{V}$		$\vee$	Last Upo	dated: 6:51:29
equester		Patient			Requ	uest Num	nber	Trackin	g ID	
	G				্ব 271	281424				
Search Save Search	h as Default <u>Load D</u>	efaults <u>Clear Def</u>	faults							
Search Save Search	h as Default <u>Load D</u> Request Type	Pefaults <u>Clear Def</u> Patient Name	faults Hold Note	Requester	Facility	Status	Report Request Status	Request Date/Time	Required Date/Time	Days Overd
Additional Search Save Search	h as Default <u>Load D</u> Request Type	Pefaults <u>Clear Def</u> Patient Name	faults Hold Note	Requester	Facility	Status	Report Request Status	Request Date/Time	Required Date/Time	Days Overd
Search Search Save Search Print Request	h as Default <u>Load D</u> Request Type	<del>Pefaults</del> <u>Clear Def</u> Patient Name	faults Hold Note	Requester	Facility	Status	Report Request Status	Request Date/Time	Required Date/Time	Days Overd
Search Save Search	h as Default Load D Request Type	Pefaults <u>Clear Def</u> Patient Name	faults Hold Note	Requester	Facility	Status	Report Request Status	Request Date/Time	Required Date/Time	Days Overd

3 The Additional Search Criteria composite can be expanded to select additional search criteria (for example, Requested Date Range, Required Data Range, Request Status, Request Type, Facility, and Report Request Status).

	5 10 1	T: Required	vale Range	E 10.	т:
3egin Date Time	End Date	Time Begin Da	te lime	End Date	lime
		00:00		Y	
Request Status	Request Type	Facility		Report Reques	st Status
elect: All None All Final All Non-	Final Select: All None	Select: A	II None	Select: All No	one
Accepted	Amend Record	▲ 🔲 BC	G Bella Coola General Hospit	al 🔺 🔲 Archived	ł
Access Denied/Rejected	Continuity of Car	e 🔲 🖪 BC	G Medical Imaging	Archived	d - In Process
Cancelled	📃 🔲 Non Continuity o	of Care 🗉 🔲 EGI	H Evergreen House	C Archived	d - Preview Not I
Complete	Request to View R	Record 📃 🔲 HT	H Hilltop House	🔲 Batch In	Process
Conditionally Accepted	Restrict Consent	LGI	H Breath Program	👻 📄 Error Arc	hiving the Repo
Invoiced	✓ Secure Record	+ 4		• •	
earch for the req opulates with all	quest or requests to requests to requests matching	based on selected g the criteria.	d criteria. The	Request Que	eue viev
Request Queue					
lequester	Patient	Request Number	ti.	Tracking ID	
	1.10				
Additional Search Criteria					
Additional Search Criteria     Additional Search     Save Search as Default     Load Defaults     Cla	lear Defaults				
→ Addional Search Criterie ★ Search Search as Default Load Defaults CL the Request Request Type Z71253007 Hen Centins ← tivyiityy 1 11	er Defaults » Paleet Name Hold Note Re alty of Care CSTPRODHMA HANTIS	neter Facily Bis Test Coll Medical Imagin	Stañ Report R. Report Duto/ g Logged 07:3an-2017 10 dify a Dac	ine Required Date/T 33 19-Jule 2017 1033	ïme 3
Addomi Sarch Citers           Barch         See Sarch as Default         Lead Default         Call Default	- Retrieve, V ew or modify a rec t to view or modify	View and Mo	dify a Rect orbite a Rect orbi	ne Required Date/T 33 1994-2017 1951 <b>QUEST</b> h for the requ	uest in t
Addomi Sarch Criters	A COTANDA A COTANDA A COTANDA A A MARK REAL A COTANDA A A A A A A A A A A A A A A A A A A	v from the list of re	a toget Report. Report Date/T toget 07.50-207718 dify a Rec entered, searc equests displa	ne Required Dater 33 19-36-2077 1953 <b>quest</b> h for the requ yed $2 \sim 2 \sim 2$	uest in t
Additional Search Citeres Menter Search as Default Load Database Citeres Prove Request Type Ctivity 1.111 - To retrieve and via Request Queue. Select the request Request Queue	A consistent of the second of	View and Mo	a loged Report. Report Date/T b loged 07.360-207719 dify a Rec entered, searc equests displa	ne Required Date 7 33 19-Jac 2017 155 <b>quest</b> h for the requ yed wyed Last Updatet: 7	uest in t
Additional Search Criters  Additional Search Cr	- Retrieve, V ew or modify a rec t to view or modify	reter Facily BR. Tet. List Macademage View and Mo quest previously e r from the list of re Request Number	a tará Report R. Report Dato 7 a topped 07.300-307710 dify a Rec entered, searc equests displa	ne Required Date 7 33 19-Je 2017 195 <b>guest</b> h for the requ yed Last Updated: 7	uest in t
Additional Search Citeres Additional Search Cit	- Retrieve, V ew or modify a rec t to view or modify	reter Facily BR Tet. LOH Metad Image View and Mo quest previously e r from the list of re Request Number 271281424	a logged Report R. Report Date? a logged 0730a-307710 a logged 0730a-307710 contered, searc equests displa	ne Required DaterT 3 19-Je2077195 <b>guest</b> h for the requ yed Last Updated: 7	uest in t
Additional Search Criteria  Additional Search Criteria  Additional Search Criteria  Additional Search Criteria	ew or modify a rec	Peter Facily PR. Tex. LiH Meical Image View and Mo quest previously e v from the list of re Request Number 271281424	a logger Report Report Date 7 a logger OF Jan 2077 10 contered, searc equests displa	ne Requed Dater 3 19-Je2017 165 <b>quest</b> h for the reque yed Last Updated: 7	uest in t
Additional Search Criteria  Request Queue  Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request Queue Request		Peter Facily PRATER LIFE Medical Image View and Mo quest previously e v from the list of re Request Number 271281424	a logger Report Report Date 7 a logger OF Jan 2077 10 contered, searc equests displa	ne Requed Dater 3 19-Je2077 1955 <b>guest</b> h for the reque yed Last Updated: 7	uest in t
Additional Search Criteria  Request Queue  Request Queue  Request Criteria  Additional Search Criteria  Save Search as Default	- Retrieve, V ew or modify a rec t to view or modify Patient	View and Mo quest previously e request previously e request Number 271281424	a logget Report R. Report Date 7 a logget OF Jan 2077 10 contered, searc equests displa Tracking II	reaction of the request of the reque	uest in t

**3** Open the Request view. The request information is populated in the Request view.



quest l	Number		Request Type		Facility		Requ	Jester		
12814	24		Non Continuit	ty of Care	- LGH Lion	Gate Hospital	- Mo	use, Minni	ie	9
Patie tient	ent Informati Name	ion								
ackin	g ID									
6										
Patie	nt Name: C	STPRODHIM,	CHERRY		Sex: Female					
Date	of Birth: Ma	ay 3, 1966 12:0	0:00 AM		Privacy Statu	: Not on File				
Patie	nt Name	MRN	Admit	Date Di	charge Date	FIN	Encounter T	ype i	Attending Ph	ysician
c	STPRODHIN	A, CH								
Pape	er Document	ts for CSTPRO	DHIM, CHERRY							
Pape Deliv tiven	er Document very Informat v Method	ts for CSTPRC	DDHIM, CHERRY			Dr- 011				
Pape Deliv liven Aail	er Document very Informat v Method	ts for CSTPRC	DHIM, CHERRY		v Billable	Pre-Bill				
Pape Deliv liven Aail Add	er Document very Informat v Method ress Informat Bill To M	ts for CSTPRC ition ition Aail To Typ	DHIM, CHERRY	Street Address	Billable     Street Address	Pre-Bill	City	State	Country	Zip Co
Pape Deliv liven fail Add rint	er Document very Informat y Method ress Informat Bill To M	ts for CSTPRC ttion ttion Mail To Typ Ø Mai	DHIM, CHERRY	Street Address	Street Address	Pre-Bill Street Address 4	City North Va	State Britis	Country Canada	Zip Co V7L 2L:
Pape Deliv liven fail Add 'rint ©	er Document very Informat y Method ress Informat Bill To M	ts for CSTPRC tion tion Mail To Typ Mai Billi	DDHIM, CHERRY	Street Address 110-4500 Oak .	Billable     Street Address	Pre-Bill Street Address 4	City North Va Vancouver	State Britis Britis	Country Canada Canada	Zip Co V7L 2L V6H 3N
Pape Delivery Aail Add Print ©	er Document very Informat y Method ress Informat Bill To M	ts for CSTPRC tion ftion Aail To Typ Mai Billiu	DHIM, CHERRY Street Address 1 231 15th St E g Attention: Mi	Street Address 110-4500 Oak .	Billable     Street Address	Pre-Bill Street Address 4	City North Va Vancouver	State Britis Britis	Country Canada Canada	Zip Co V7L 2L: V6H 3N
Pape Deliv Iliven Aail Add Print © Acce Acce	er Document very Informat v Method Bill To M v v bounting of Di Required e	ts for CSTPRC tion Mail To Typ Mai Billi isclosure	DHIM, CHERRY  Street Address 1 3231 13th St E 19 Attention: Mi	Street Address 110-4500 Oak .	Billable     Street Address	Pre-Bill Street Address 4	City North Va Vancouver	State Britis Britis	Country Canada Canada	Zip Co V7L 2L: V6H 3N
Pape Deliven Mail Add Print Add Print Add Print Reques	er Document very Informal y Method ress Informal Bill To M P P Dounting of Di Required e e uest Informal t Reason	ts for CSTPRC tion Aail To Typ Mai isclosure	DHIM, CHERRY	Street Address 110-4500 Oak -	Sillable     Street Address      Street Address      Desciption      for      f	Pre-Bill Street Address 4	City North Va Vancouver	State Britis Britis	Country Canada Canada	Zip Co V7L 2L: V6H 3N
Pape Delin elivery Mail Add Print © Acce ( ) AOD ACCE ( ) AOD Reques Qualit	er Document very Informat v Method Bill To N vounting of Di Required e uest Informat t Reason v/Chart Revi	ts for CSTPRC tion Jail To Typ Mai isclosure tion	DHIM, CHERRY	Street Address 110-4500 Oak . 2] Authorization F Authorization	Billable     Street Address      Description     f	Pre-Bill Street Address 4	City North Va Vancouver	State Britis Britis	Country Canada Canada	Zip Co V7L 2L: V6H 3h

To modify the request, select the Modify Request button <u>in the upper-right corner of the Request view.</u>



5 Make necessary changes.

6 Click the Save Request button in the upper-right corner of the Request view to save the changes.



### Activity 1.12 – Add, View and Delete a Note

To add a note to a request, search and select the request in Request Queue and open the **Notes** view.

Request S Invoice Rotes Invoice Rotes Action Invoice Rotes Invoice Request 271281424	Request Jinvoice S Notes 14 Holds XR Template R XR Distribute	Request III Invoice Note     Invoice Note     Invoice Note     Invoice Note     Invoice Note     Invoice Note	Click	(th	e Ao	dd Note button to add a note.	
Request 271281424	Request 271281424	Request 271281424 +	🝳 Request 📳	] Invoice	e 😔 Note	es 🕘 *Holds 🔣 XR Template 🗩 XR Distribute	
Request 2/1201424	+	Note Type Date Author Note	Banuart	27120	-		
			271281424	1424			

3 Enter a note in the lower window. Check the Permanent option if the note should be saved as a permanent note. When deleting a permanent the note, a warning will prompt the user prior to

	eletion.
Rec +	xest 271281424 M
No	Type Date Author Note
8	Ø → Text Hotel ▲
	Pemaret
С	lick the Save Note button 🧖 . The note is displayed in the Notes view.
F	equest 271281424
-	Note Type Date Author Note
	⊿ Request 01-Feb-2018 19:46 Poon Sylvia, Test Note
	Note: The note is denoted by a paperclip 🔜 icon in the Note column of the request in
	the Request Queue view. The number of notes is displayed in the notes view
	heading .
	60
Т	b delete a note, select the note and click the <b>Delete Note</b> button 🦰 .
1	Request 🔂 Invoice 😔 Notes (1) 🖉 *Holds 🔣 XR Template 匣 XR Distribute
Γ	D
	Request 271281424
	+(*)
	Note Type Date Author Note
	▲ Request



😂 Delete Note			<b>X</b>
Are you sure you want to del	ete the note?		
		Yes	No

# Activity 1.13 – Add, View and Delete a Hold

1 To add a hold to a request, search and select the request in Request Queue and open the Holds view.

🔘 *Holds 🔪	
------------	--

incluest in invoice (2) notes (1)	/ *Holds 🛛 🕅 XR Template 🖳 XR Dist	stribute		
Request 271281424				
Hold Reason	Start Date	End Date		
1				
Select a hold rea	son from the Hold	d Reason list		
Iold Reason				
xtension Requested/	Pending Review			
Requested Chart(s) N	ot Available			
aquested ( hart(s) N	lot Complete			
Are the stee Chart(s) is	a destine a			
Vaiting for ROI Auth	orization			
Vaiting for ROI Auth	orization			
Vaiting for ROI Auth	orization Start Date. To en	nter the current date, press	'T'.	
Vaiting for ROI Auth	orization Start Date. To en	nter the current date, press	'T'.	
Waiting for ROI Auth Enter or select a	orization Start Date. To en	nter the current date, press	'T'.	
Vaiting for ROI Auth Enter or select a	orization Start Date. To en	nter the current date, press	'Τ'.	
Vaiting for ROI Auth	orization Start Date. To en	nter the current date, press	'Τ'.	
Vaiting for ROI Auth Enter or select a art Date	orization Start Date. To en	nter the current date, press	'T'. Hold view.	
Vaiting for ROI Auth Enter or select a art Date	orization Start Date. To en	nter the current date, press ne hold is displayed in the H	'T'. Iold view.	
Vaiting for ROI Auth Enter or select a art Date Click the Save Ho	orization Start Date. To en El button de . Th	nter the current date, press ne hold is displayed in the H	'T'. Iold view.	
Vaiting for ROI Auth Enter or select a art Date Click the Save Ho Request Juvoice	orization Start Date. To en Eld button I . Th	nter the current date, press ne hold is displayed in the H	'T'. łold view.	
Vaiting for ROI Auth Enter or select a art Date Click the Save Ho Request Juvoice	orization Start Date. To en Eld button I . Th Notes (1) (1) *Holds	nter the current date, press ne hold is displayed in the H	'T'. Hold view.	
Vaiting for ROI Auth Enter or select a art Date Click the Save Ho Request Jinvoice	orization Start Date. To en Eld button I . Th Notes (1) (1) *Holds L424	nter the current date, press ne hold is displayed in the H s XR Template 💽 XR Distribute	'T'. Hold view.	
Vaiting for ROI Auth Enter or select a art Date Click the Save Ho Request Save Ho Request 271281 + So 2	orization Start Date. To en Eld button 🛃 . Th Sold button (1) (1) *Holds 1424	nter the current date, press ne hold is displayed in the H	'T'. Hold view.	
Vaiting for ROI Auth Enter or select a art Date Click the Save Ho Request Survoice Request 271281 + So & So Hold Reason	orization Start Date. To en Eld button I . Th Notes (1) (1) *Holds L424	nter the current date, press ne hold is displayed in the H s I XR Template I XR Distribute Start Date	'T'. Iold view.	nd Date

Note: The hold is denote Request Queue vie	d by a hand  icon in ew.	the Hold column of the reque	est in the
'T'.	Holds XR Template R XR Distribut		ent date, pres
Request 271281424			
+ 🗟 Ø 🖊			
Hold Reason	Start Date	End Date	
Requested Chart(s) Not Complete	▼ 1/29/18	Ⅲ 2/1/18	
Request 🔂 Invoice 😔 Notes (1) 🖤 *1	Holds 🛛 🔣 XR Template 🗐 XR Distribute		
+ 🖬 🖉			
Hold Reason	Start Date	End Date	
Kequested Chart(s) Not Complete	<ul> <li>↓ 1/29/18</li> </ul>		±
🧐 Request 🔜 Invoice 🔁 Notes (1) 🖤 *	Holds 🛛 🔣 XR Template 💭 XR Distribute		
Request 271281424 + 😠 🥝 🕷			
Request 271281424 + 🛃 🖉 🗱 Hold Reason	Start Date	End Date	E



# Activity 1.14 – Print a Mailing Label

- 1 To print a mailing label for a request, from the Request view click the arrow next to the Print icon.
- 2 Select Mailing Labels.

闷 Request 🛃 Invoice 😔 Notes (1) 🖑 *Holds 🔣 XR Template 厘	XR Distribute	+ 💊 🗟 🖉 😓	🗖 🗖 🔞 Request Qu	Jeue
Tracking ID		—	Mailing Labels	
			ROI Cover	

If you have set your printer defaults, the label should print to your selected Label Printer. If there is no printer defaults, you will get the Preference (Filtered) dialogue box. Select the Label Printer and select Apply and OK.

Preferences (Filtered)		
type filter text	Printers	\$ • \$ • •
Report Management Printers	Lette Pinter	
	Restore Defe	Apply
	OK	Cancel

# Activity 1.15 – Print a Cover Letter

1 To print a cover letter for a request, from the Request view, click the arrow next to the Print icon.

2	Select ROI Cover.	
	🖂 Request 🔂 Invoice 😔 Notes (1) 🖑 *Holds 🔣 XR Template 💭 XR Distribute	+ 💊 🚽 🖉 🍪 🤊 🗖 🗖 🎑 Request Queue
	Tracking ID	Mailing Labels
		ROI Cover

If you have set your printer defaults, the letter should print to your selected Letter Printer. If there is no printer defaults, you will get the Preference (Filtered) dialogue box. Select the applicable Letter Printer and select Apply and OK.

Preferences (Filtered)			- • •	
type filter text	Printers		⇔ ▼ ⇔ ▼ ▼	
Request Management Printers	Letter Printer:	•		
		•		
		Restore Defau	Its Apply	
		ОК	Cancel	

Note: The type of letter that is available to print depends on the type of request and status of request.

#### To Print an Invoice / Pre-Payment Cover Letter

1 If you are printing an Invoice / Pre-Payment Cover Letter, you must go into the **Invoice** tab and click on the **Add Invoice** icon

🔍 Reques 🔂 Invoice	Notes 🖑 Holds 💽 XR Template 💭 XR Distribute	🕂 🖓 🖬 🖉 🗰 🔁 🛨

2 Once in the Invoice tab, click in the **Paper Page Distributed** box, then click on **Save**. This is a workaround in order to trigger the Invoice / Pre-Payment Cover Letter, as we will not be using the Invoices out of AccessHIM. Refer to the BCCSS SOP on submitting invoices.



Invoice Details						
Total Number of Pages Distributed:	0		Pata		Calculated Charges	
Panes Pages Distributed			Nate		Calculated Charges	
raper rages distributed	<u> </u>					
Microfilm Pages Distributed 0						
Electronic Pages Distributed 0						
Additional Charges						
Mileage	miles	0	\$0.00	/ mile		
Other		0	\$0.00			
Postage		0	\$0.00			
Retrieval		0	\$0.00			
Sales Tax		0	\$0.00			
Telephone		@	\$0.00			
Witness Fees		0	\$0.00			
Total Charges						
					Calculated Total	Adjusted Total
					0.00	0.00
					Adjust Calculated T	otal

5 The Complete Request Option dialogue box will appear, click on **No.** 



4 Click on the print icon and choose applicable Invoice/Prepayment letter.



# Activity 1.16 – View Request History



To view the history of a request, from the Request View, click the sash at the bottom of the display.



2

The Request History is displayed.

equest Number	Reque	st Type	Faci	lity		Requester	
271281424	Non	Continuity of Car	e 👻 LG	LGH Lions Gate Hospital 👻		Mouse, Minnie	
<ul> <li>Patient Information</li> <li>Patient Name</li> </ul>							
Tracking ID		``	0				
ж							
Patient Name: CSTPRO	DHIM, CHERRY		Sex: Fe	male			
Date of Birth: May 3, 19	66 12:00:00 AM		Privacy	Status: Not on File	2		
				<b>5</b> 10 1			
Patient Name I	MRN	Admit Date	Discharge Date	FIN	Encou	nter Type	Attending Physician
CSTPRODHIM, CH CSTPRODHIM, SA	MRN	Admit Date	Discharge Date	HIN	Encou	nter Type	Attending Physician
Patient Name II CSTPRODHIM, CH CSTPRODHIM, SA Paper Documents for C	STPRODHIM, CHEF	Admit Date	Discharge Date	FIN	Encou	nter Type	Attending Physician
Patient Name I CSTPRODHIM, CH CSTPRODHIM, SA Paper Documents for C lequest History	STPRODHIM, CHEF	Admit Date	Discharge Date	FIN	Encou	nter lype	Attending Physician
Patent Name II CSTPRODHIM, CH CSTPRODHIM, SA Paper Documents for C iequest History Performed Date ExtL_2028.2232.814	STPRODHIM, CHEF	Admit Date	Discharge Date	FIN Rejection Rea	Encou eson(s)	nter lype	Attending Physician Patient Informatio
Paper Documents for C CSTPRODHIM, CH CSTPRODHIM, SA Paper Documents for C lequest History Performed Date Feb 1, 2018 7:30:36 PM Each 1:0183 7:80:40 PM	STPRODHIM, CHEP Performed B	Admit Date	Request Status Logged	HIN Rejection Rea	Encou eson(s)	nter lype	Attending Physician Patient Information No
Patent Name II CSTPRODHIM, CH- CSTPRODHIM, SA Paper Documents for C equest History Performed Date Feb 1, 2018 7:30-36 PM Feb 1, 2018 7:23-38 PM	STPRODHIM, CHEF	Admit Date	Request Status Logged Logged	FIN Rejection Rea	Encou eson(s)	nter lype	Attending Physician Patient Information No No No
Patient Name II CSTPRODHIM CH- CSTPRODHIM CA CSTPRODHIM, SA CSTPRODHIM, SA Paper Documents for C equest History Performed Date Feb 1, 2018 7:30-36 PM Feb 1, 2018 7:27-38 PM Feb 1, 2018 7:27-38 PM Feb 1, 2018 7:27-38 PM	STPRODHIM, CHEF	Admit Date	Discharge Date	FIN Rejection Res	Encou eson(s)	nter lype	Attending Physician Patient Informatio No No No No
Patent Name II CSTPRODHIM, CH CSTPRODHIM, CA CSTPRODHIM, SA 	STPRODHIM, CHEF	Admit Date	Discharge Date	FIN Rejection Rea	Encou eson(s)	nter lype	Patient Information No No No No No

To expand the Request History to full screen or close the Request History, click the sash 3 again.

A T						
quest History	D ( 10			8 × 11 × 1		
erformed Date	Performed By	Request Status	Rejection Reason(s)	Patient Information .		
eb 1, 2018 7:30:36 PM		Logged		No		
eb 1, 2018 7:28:04 PM		Logged		No		
eb 1, 2018 7:27:38 PM		Logged		No		
eb 1, 2018 7:26:22 PM		Logged		No		
eb 1, 2018 7:11:26 PM		Logged		No		
eb 1, 2018 6:03:57 PM	Poon, Sylvia	Logged		No		

Last update 2018/08/05 (N97)


## ACTIVITY 2 – Report Request

#### **Learning Objectives**

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

Print Patient Charts Using Clinical Reporting XR.

## **Overview**

1

The Report Request application is used to generate ad hoc or on demand patient charts using Clinical Reporting XR. The application is typically used to print the entire health record, or portions of a health record, for Release of Information (ROI) requests.

Requests can be generated at the Person, Cross-Encounter, Encounter, Accession and/or Document level scope; the latter three being the most common.

## Activity 2.1 – Report Request Login

Access the Citrix StoreFront HIM folder and click on the Report Request icon

😂 Cerner				APPS				M	leno 🔻
Categories > H	HIM							Q, Search All Apps	
Access HIM HIM	Appbar HM	Discern Reporting Portal	HIM Patient Deficiency Ana HIM	HIM Patient Information Re HIM	HIM Physician Deficiency A	HIM Request Queue	HIM Task Queue	HIM Tracking	
Index HBM	PM Office HIM	Powerchart HM	Report Request	Report Request Maintens	Scheduling Appointment B HIM				

2 You will be prompted to login, enter Username, Password and click **OK**.

erner Millennium <sup>®</sup>	
Username :	
<b>↓</b>	
Password :	
Domain :	
prodbc 👻	
Office Annual	

3 The Report Request window will appear.

置 Report Request									
Task View Help									
Subject Selection								0 0	🗮 Release Details
Report scope: Encounter	Visits								Purpose
'Name:	Visit Admit Date	Discharge Date	Visit Type MRN	FIN Client	Facility	Medical Service	Attending Physician	Health Plan	•
MRN:									Destination
FIN:									
Accession:									Requester
Document:									
Search Clear									Proper authorization received?
Event status: Verified only									Comments
Printable Date Ranne									A
All dates									
From an Add Amma III hh inn									
To as dd durm in hh as									
in: ms.ms.an. AAAA									
Clinical range O Posting range									
									Comu To
									All personnel
									Related personnel
									Visit Name Relationship
									The second
Template Selection 🔝 Submitted Requests								a - c	
		-						-	
									Output type: V PDF CCD
									Issued By:
									sena to:
									Reset Send Report Preview Report

### 4 Under Subject Selection, select the **Report Scope**.

*Name: Person Cross-Encounter MRN: Encounter FIN: Accession Document Document:	Report scope:	Encounter		
MRN:     Encounter       FIN:     Accession Document       Accession:	*Name:	Person Cross-Encounter		
FIN: Accession Document Document:	MRN:	Encounter		
Accession:	FIN:	Accession Document		
Document:	Accession:			
	Document:			

Last update 2018/08/05 (N97)



-	
-	
-	_

**NOTE 1**: HIM ROI staff will use the **Encounter Report** Scope the majority of the time. **Person** and **Cross-Encounter Reports** Scopes are <u>**not**</u> recommended for use.

**NOTE 2:** When using document scope only select **Document Template.** Choosing any other template will cause printing issues.

Report Scope	Description
Encounter	<ul> <li>Produces reports that include all documents/results that have been verified throughout a patient's encounter as well as any person level information included on the selected template. Person level information includes allergies, diagnosis, social history, family history, etc.</li> <li>This scope is used by audiences who require comprehensive records of a patient's stay.</li> <li>Can be run multiple times to print a separate packet for each encounter.</li> <li>Can use if single documents, limited specific documents, lab results, MI results, PowerForms, etc. are needed from one encounter. Example: Patient is requesting Discharge Summary and Operative Report from a specific encounter. In the Documents Template, the ROI Clerk would select the Discharge Documentation and Surgical Documentation sections only.</li> </ul>
Accession	<ul> <li>Produces a report that contains the results for a single accession number.</li> <li>When the Accession scope is selected, the search button will update to "Accession Search" and will allow the user to select one or more Accessions.</li> <li>Accession level printing will be used by Medical Imaging in Radorderviewer.</li> <li>Typically HIM will not be using the Accession scope, however if a specific accession number is known, you can use this scope and search for results by the accession number. Note: Each individual order will appear in the search box. If the order selected is on an accession with multiple orders, the entire accession will print.</li> </ul>

Document	<ul> <li>Produces a report that contains the selected document or documents.</li> <li>When the Document scope is selected, the search button will update to "Document Search" and will allow the user to select one or more documents.</li> <li>If the second of the second</li></ul>				
Person	Produces reports that contain result information for all encounters associated with the specified patient. This scope facilitates monitoring the condition of patients who are admitted to your institution more than once.				
Cross-Encounter	Produces a report that includes selected encounter information from the user. This scope is used by audiences who require specific patient encounters using the medical record number or financial number.				

<sup>5</sup> You can search using the patient name (last, first), patient MRN, and/or the patient FIN (Encounter number). If multiple patients meet the search criteria, the standard Patient Search box will appear and the user can select the appropriate patient based on other patient identifiers.





Once a patient is selected, the "Visits" panel will populate with all of the patient's encounters listed. The columns are sortable for easier viewing in the case of multiple to many encounters. This list honors Org Security, meaning that the user will only be able to view encounters for the locations where they have security granted. If the patient has encounters at other facilities on the network, they may not be viewable here.

Visit	Admit Date	Discharge Date	Visit Type	MRN	FIN	Client	Facility
1	12/8/2017	12/8/2017	Pre-Outpatient OB	700000379	700000016049	LGH Lions Gate Hospital	LGH Lions (
2	12/8/2017	12/8/2017	Pre-Outpatient	700000379	700000015799	LGH Joint Replacement Access Clinic JRAC	LGH JRAC
3	12/5/2017	12/5/2017	Emergency	700000379	700000016061	LGH Lions Gate Hospital	LGH Lions @
4	12/5/2017	12/5/2017	Inpatient	700000379	700000016057	LGH Lions Gate Hospital	LGH Lions (
5	12/5/2017	12/5/2017	Recurring	700000379	700000016054	LGH Lions Gate Hospital	LGH Lions (
6	12/5/2017	12/5/2017	Minor Surgery	700000379	700000016051	LGH Lions Gate Hospital	LGH Lions (
7	12/4/2017	12/4/2017	Pre-Outpatient OB	700000379	700000010827	LGH Lions Gate Hospital	LGH Lions (
8	11/30/2017	12/8/2017	Day Surgery	700000379	700000015791	LGH Lions Gate Hospital	LGH Lions (
9	11/23/2017	11/23/2017	Outside Images	700000379	700000015419	PEM Medical Imaging	PEM Med Ir
10	11/23/2017	11/23/2017	Specimen	700000379	700000015418	PEM Laboratory	PEM Labora
11	7/11/2017	7/11/2017	Inpatient	700000379	700000007384	SGH Squamish General Hospital	SGH Squam
12	3/14/2017	3/14/2017	Data Storage	700000379	700000003615	LGH Lions Gate Hospital	LGH Lions @
13	1/10/2017	5/10/2017	Inpatient	700000379	700000002546	LGH Lions Gate Hospital	LGH Lions (
14	12/5/2016	5/21/2017	Recurring	700000379	700000002193	LGH Pulmonary Function Lab	LGH PF Lab
15	12/5/2016	12/5/2016	Recurring	700000379	700000002184	LGH Pulmonary Function Lab	LGH PF Lab
16	11/2/2016	11/2/2016	Outpatient	700000379	700000001444	LGH Pulmonary Function Lab	LGH PF Lab
17	11/2/2016	11/2/2016	Inpatient	700000379	700000001429	SGH Squamish General Hospital	SGH Squam
18	9/22/2016	11/14/2016	Inpatient	700000379	700000000465	LGH Lions Gate Hospital	LGH Lions (
19		5/21/2017	Pre-Outpatient	700000379	700000001749	LGH Pulmonary Function Lab	LGH PF Lab
20		5/21/2017	Pre-Recurring	700000379	700000003169	LGH Chemotherapy Clinic	LGH Chemo
21		8/31/2017	Pre-Outpatient	700000379	700000007566	LGH Cast Clinic	LGH Cast CI
22		8/31/2017	Pre-Outpatient	700000379	700000007452	SGH Squamish General Hospital	SGH Squam
22		5/21/2017	Pre-Recurring	700000379	700000002228	LGH Pulmonary Function Lab	LGH PF Lab

Select a **Visit Type** (encounter) as per the requested encounter/dates. You can select more than one Visit Type by using the "Control-Click" functionality to highlight the encounters you wish to print; however, you will NOT be able to preview the report. It is recommended that you select one Visit Type at a time to preview and print.

Of note, pages are numbered when the patient chart is printed; therefore, if you choose more than one Visit Type, the pages of the documents will all be sequentially numbered.

Select the Event Status and Printable Date Range.

Event Status:

7

- *Verified only:* This option would include all documents and/or results considered authenticated, verified, or modified.
- Verified and Pending: This option includes all published results considered verified, modified, in-progress, unauthenticated, transcribed, or transcribed-corrected.
- All Results: This option includes all published results in any defined status including inerror and cancelled. This may or may not be available based on the user's position and their security settings.



**Note:** If the user is not authorized to print using this status and still selects it, the request will be generated as if the "Verified and Pending" status was selected.

- <u>Printable Date Range</u>: This allows the user to specify if all or part of the patient chart is needed.
  - o If "All dates" is checked, then the entire encounter will print.
  - If "All dates" is unchecked, then the user has the ability to select a specified time WITHIN the encounter. For example, if the patient has a long encounter and only the last three days of information is needed, the user would need to fill in the date and time necessary.

E	vent status:	Verified or	ily			•
>	Printable Da	te Range				
[	All dates					
1	From: 02/	06/2017		00:00	]	
	To: 02/	09/2017		23:59	]	
	Olinical ratio	inge 🔘 Po	sting	range		

#### <u>Ranges:</u>

- o Clinical Range: Will include all clinically relevant information on the patients encounter.
- Posting Range: Will only include information that was posted during the patient stay (admit to discharge).

#### 8 Select the **Template**.

• Template Selection:

Choose the appropriate template from the drop down based on the needed information. The list of available templates may vary between positions if the Template Security functionality is utilized. When the template is selected, the sections on the template will display below. When no sections are selected, ALL sections that have information will print. The user has the ability to select one or multiple sections to print, if needed. It is encouraged to always leave the sections unselected unless truly necessary.

$\longrightarrow$	Template Selection 📴 Submitted Requests	2° ° ©
	Master ROI Template	Published 🗸
	Administrative Template (Internal)	
	Document Template	
	ED Transfer Template	
	Inpatient/General Transfer Template	
	Laboratory Template	
	Master ROI Template	
	Medical Imaging Lemplate	
	NLCU transfer Lemplate	



# **Note:** Once a template is selected, the list of documents will appear under the Template Selection.

🔄 Template	Selection 📴 Submitted Requests
Master ROI	Template
🐚 Mas	ster ROI Template
8	CLIN DOC - Admission Notes
8	CLIN DOC - Advance Care Planning Documentation
8	CLIN DOC - Medical Assistance in Dying
8	CLIN DOC - Resuscitation Documentation
8	CLIN DOC - Emergency Documentation
8	CLIN DOC - Mental Health Documentation
8	CLIN DOC - Consult Notes
8	CLIN DOC - Progress Notes
8	CLIN DOC - Clinical Pharmacy Notes
8	CLIN DOC - Clinic Notes
8	CLIN DOC - Oncology Documentation
8	CLIN DOC - Communication Notes
8	CLIN DOC - Cardiology Procedures
8	CLIN DOC - Gastroenterology Procedures
	CLIN DOC - Genitourinan/ Procedures

# **Note:** Next to the template selection, you will see a drop down box for **"Published"** or **"Working"**. This will automatically default to **"Published"**. Never use "Working".

🔄 Template Selection 📘	Submitted Requests		$\checkmark$	2 🗖
Master ROI Template		•	Published	•
Master ROI Temp	<b>late</b> Imission Notes		Published Working	1
	hanne Care Blanning Desumentation			

Template	Description
Documents Template	<ul> <li>This includes all Clinical Documents, Nursing PowerForms and Medical Imaging results.</li> <li>Use this template when:         <ul> <li>A patient needs all of the clinical documents from their visit.</li> <li>A patient needs one specific document from their visit.</li> </ul> </li> </ul>
ED Transfer Template	• Condensed version of the chart with <i>ED specific information</i> and any <i>Lab or Medical Imaging results.</i>
	<ul> <li>Used typically by clinical positions in ED transfer scenarios to a facility without CST Cerner access.</li> </ul>
Inpatient/General Transfer Template	• Condensed version of the chart with <i>Transfer specific documentation</i> and any <i>Lab or Medical Imaging results.</i>
	<ul> <li>Used typically by clinical positions in transfer scenarios to a facility without CST Cerner access.</li> </ul>
Laboratory Template	• All Lab results for a patient's encounter.
	Used when a patient is requesting some or all lab results

	from an encounter.
Master ROI Template	<ul> <li>EVERYTHING from a patient's encounter.</li> <li>Excluded: Interdisciplinary Signature Sheet and Personnel Name History</li> </ul>
	<ul> <li>Use when:</li> <li>A patient, lawyer, patient representative, etc. is requesting a patient's full, legal medical record.</li> <li>Can be printed multiple times at the encounter level for all encounters.</li> </ul>
Medical Imaging Template	• All Medical Imaging results from a patient's encounter.
	<ul> <li>Used when a patient is requesting some or all Medical Imaging results from an encounter.</li> </ul>
	<ul> <li>**Note: If a patient is requesting <i>images</i>, Medical Imaging will be responsible for burning images to a CD and the patient will need to specifically request that information from the MI Department.</li> </ul>
NICU Transfer Template	Condensed version of the chart with NICU and Newborn     Transfer specific documentation and any Lab or Medical     Imaging results.
	<ul> <li>Used typically by clinical positions in transfer scenarios to a facility without CST Cerner access.</li> </ul>
Administrative Template	• This includes the following documents: ROI correspondence, Personal Effects and Valuables, I Have Been Scanned, Interdisciplinary Signature Sheet and Personnel Name History.
	Used when the specific information is required to be released.

#### 9 Submitted Requests Tab:

This tab provides a snapshot of all the requests the user has made while in the tool. It will display the Patient Name, Report Request ID, Status of the request and the Output Device selected (if applicable).

Т	emplate Selection [ 📑 S	ubmitted Requests					
	Request Status	Person Name	Requested Date/Time	Report Request Id	Output Device	Pages	Receiving Personnel
0	Previewed	SMITH, MORGAN	2/20/2017 2:05 PM CST	3746286	N/A	3	Model, User 123 Cerner
8	Error Sending to DMS	SMITH, MORGAN	2/20/2017 2:05 PM CST	3746285	XRCHARTNULL	3	Model, User 123 Cerner

#### 10 Complete the **Release Details** tab.

**<u>Purpose</u>**: This is a required field that provides insight into the reasoning of the request. The purpose should be the same as the corresponding request logged in AccessHIM Request



#### Management.

The remaining fields in the Request Details tab (Destination, Requester, Proper authorization received and Comment) are not required to be filled in as the ROI request is logged in AccessHIM.

🗮 Release Details		Helease Details	
*Purpose		*Purpose	
	•	Patient/Personal	
Destination		Administrative Purpose	· · · · · · · · · · · · · · · · · · ·
Patient's Home Address		Birth Reporting Cancer Registry Reporting	
Requester		Continuing Care Crime Victims	
CSTPRODHIM, Sally		Education Planning	
Proper authorization received?		ID of Patient/Notification of Family	
		Insurance Claim	=
Comments		Law Enforcement Investigation	
	*	MCFD Review Medical Examiner Case	
		Medical Genetics/Hereditary	
		Mental Health Review Notice of Application	
		Organ Donation Services	
		Other Patient Transfer	
	<b></b>	Quality/Chart Review	3
		"Research/Clinical Trials	Ψ

#### 11 **Destination Parameters** tab.

<u>Related Personnel:</u> If the user is granted the security privilege to request charts for others, this box will populate with the names of providers that have established a relationship with the patient within the system. By selecting a name, the user's security will be overwritten with the security level of the provider selected. That provider now becomes the "Receiving Personnel" of the report. If the security privilege is not granted, this box will appear blank at all times. **HIM will NOT be using this functionality.** 

	🕘 Dest	ination Parameters		
F	Copy T	o		
L	🔲 Aļi p	ersonnel		
L	Related	personnel		
L	Visit	Name	Relationship	
L	1	Cerner Test, Physician - Ambulatory Five Cerner	Admitting Physician	
L	1	Cerner Test, Physician - Ambulatory Five Cerner	Attending Physician	
L	1	Giebler, Bridget	Database Coordinator	
L		Pratt, MD, Alyssa Cerner	Primary Care Physician	

<sup>12</sup> Check the applicable **Output type.** 

- *PDF:* Should always be selected when producing a paper copy.
- CCD: Should only be selected when creating a CCD copy for Meaningful Use (NEVER USE).

$\longrightarrow$	Output type: V PDF 🔲 CCD
	Issued By: LGH Lions Gate Hospital 🔹
	Send to: For-HIM-Only
	Reset Send Report Preview Report

13 Choose your facility under **Issued By**. This field will automatically display the facility where the patient is registered. Use the magnifying glass to search for other facilities if necessary.

	Output type: V PDF	
$\longrightarrow$	Issued By: LGH Lions Gate Hospital	
	Send to: For-HIM-Only	
	Reset	Sen <u>d</u> Report Previe <u>w</u> Report

14 Select how you want the information to be sent in the **Send to** field.

The Send to field will display a drop down menu of all printers, fax stations, CD/DVD burners (if applicable), secure email (if applicable), and file share locations (if applicable). Users can use filters to shorten the list that displays. Access the filters by right-clicking on any device.

	Output type: V PDF CCD	
	Issued By: LGH Lions Gate Hospital	
$\rightarrow$	Send to: For-HIM-Only	
	Reset	Sen <u>d</u> Report Previe <u>w</u> Report

There are 3 options that we will use:

- To *print* on a printer, select the appropriate network printer from the drop down menu.
  - sgh\_healthrec\_l1 / sgh\_healthrec\_l2
  - Igh\_him\_l1 / Igh\_him\_l2 / Igh\_him\_l3 / Igh\_him\_l4 / Igh\_him\_l5
- To save to a shared network folder, select "For-HIM-Only".
  - This option is for when you are going to use Adobe Pro to review and redact the documents you are releasing – refer to the ROI Redaction Standard Operating Procedure (SOP).
  - The file share location is <u>I:\custom\For-HIM-Only</u>
  - All the documents printed to "For-HIM-Only" will be in the file share folder irrespective of the facility they are printing the document for/from.
- To find the document you will have to look for the document with same **Report Request Id** number which is system generated while performing the print function see screenshot below.

1			2 contractor inclusion						
		Request Status	Person Name	Requested Date/Time	Report Request Id	Output Device	Pages	Receiving Personnel	
	0	Report Distributed	CSTPRODHIM, BEN	2/2/2018 11:11 AM PST	3686139	For-HIM-Only	3	Mohammad, Khaja Faisaluddin	
	0	Previewed	CSTPRODHIM, BEN	2/2/2018 11:11 AM PST	3686138	N/A	3	Mohammad, Khaja Faisaluddin	
		No Qualification	CSTPRODHIM, BEN	2/2/2018 11:11 AM PST	3686137	N/A	0	Mohammad, Khaja Faisaluddin	
		No Qualification	CSTPRODHIM, BEN	2/2/2018 11:10 AM PST	3686136	N/A	0	Mohammad, Khaja Faisaluddin	
		No Qualification	CSTPRODHIM, BEN	2/2/2018 11:10 AM PST	3686135	N/A	0	Mohammad, Khaja Faisaluddin	





**Note:** The files in the shared network folder will be automatically deleted after 72hours.

- To fax directly out, select "Default Station".
  - When "Default Station" is selected, a "Properties" icon will appear. Click on this icon.
  - The Default Station dialogue box will appear. Enter the **Fax Number** with no spaces or dashes (i.e. 6046757226).
  - o Contact Information field will not display on the fax cover sheet. DO NOT USE.
  - Under Transmit Date/Time:
    - If you want to send the fax immediately, check the radio button next to "Send Fax Immediately.
    - If you want to delay sending the fax, check the radio button next to "Send Fax at Specified Date and Time" and enter the desired date/time in the Transmit Date and Transmit Time fields.
  - Click OK.



Sample Fax Cover Sheet



604-707-5834



604-875-5568



How you want to be treated. 604-806-8894

#### FAX COVER SHEET

#### DESTINATION FAX NUMBER: [Phone Number]

TRANSMIT DATE/TIME: [Transmit Date/Time]

NUMBER OF PAGES [INCLUDING COVER SHEET]: [Page Count]

#### 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.

14 Once all the required fields are completed/selected, the **Send Report or Preview Report** buttons will no longer be dithered. Select **Preview Report**.

Output type: V PDF CCD	
Issued By: LGH Lions Gate Hospital	
Send to: ManualFax	
Reset	Sen <u>d</u> Report Previe <u>w</u> Report



15 This will open a PDF Reader (such as Adobe) and generate a PDF of the report that the user can review before printing. This step is recommended to ensure you have the correct information printing prior to sending.

E CSTPRODHIM, SALLY (700000001429)	
SGH Squamish General Hospital 38140 Behmer Drive Squamish, British Columbia V8B 0	
Patient Name: CSTPRODHIM, SALLY Gender: Female Home Address: 801 BROADWAY ST DOB: 09/20/1951 VANCOUVER, British Columbia V0N1T0 Age: 66 Years Home Phone: (604)987-8543	
Guarantor Information Guarantor Name: CSTPRODHIM, SALLY Gender: Female Relationship: Self DOB: 09/20/1951 Billing Address: 1510 BROADWAY Age: 00 Years VANCOUVER, British Columbia V3M4J5 Billing Phone: (604)987-8543	Note: It is very important to NOT print or save the chart from Adobe. There is no way to track
Contact Information <u>Additional Contact</u> Contact Name: DWIGHT WATSON Contact Name: Reletionship: ZZZDaught Home Phone: (804)898-5555 Home Phone: (804)888-55	where the report goes when this happens and thus leaves a hole in the auditing trail. Being able to track where a report goes is a requirement under FIPPA
Primary Insurance	
DOB: 09/20/1951 Insurance Phone: (604)46i Age: 66 Years Policy Number: 98783937 Health Plan/Financial Class: MSP	
Secondary Insurance	
Relationship: Claim Address: Gender: DOB: Insurance Phone: Age: Policy Number:	
Health Plan/Financial Class:	
Reg Dt/Tm:     11/02/2016 08:49     Enc Type:     Inpatient     Advance D       Adm Dt/Tm:     11/02/2018 10:13     Modificial Service:     zzinternal Medicine Disease &I       8:50 x11.00 in      III     III	

16 After previewing the entire report, click on the close button et al. at the top right-hand corner.



The **Reset** button will clear all selections and any manually entered information in the **Release Details** if selected.

Note: It is very important to NOT destroy the Patient Information Sheet (first page) that is generated with every request as it is numbered "1 of xx".

## ACTIVITY 3 – Quick Registration

#### Learning Objectives

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

Quick Reg a Patient not found in Cerner.

#### **Overview**

The **Data Storage Encounter Type** has been created for HIM staff to use in order to attach Documentation to patients who cannot be found in Cerner, when there is no appropriate existing encounter to use.

This encounter type should not be used to attach referral documentation, dictation, interpretation or any

other documentation where a type of clinical service is provided to the client directly or indirectly.

The Data Storage Encounter Type is used when the patient does not exist in Cerner and you need to add

the patient to the system for:

- Chart Tracking purposes
- ROI requests

The Admit Date/Time will auto-populate to the date/time the encounter is created. This encounter type will automatically be discharged at 23:59 hours of the admit date.

## Activity 3.1 – Quick Reg a Patient

The Data Storage Encounter Type is registered through the Quick Reg conversation, which is accessed through PM Office.



From the Citrix StoreFront, click on the PM Office icon



2 From the **Conversation Menu**, double-click **Quick Reg.** 



Task View (	Converse I Julia			
lask view	<u>a</u> roups <u>H</u> eip			
🚔 🔒 😫	2 🖻 🔁 🖉	3 🛛 🗐 🗳 As O	f 14:24 🛛 🤣 Groups	▼ Help
Conversation				
Conversation	-			
Quick Heg				
View Encounte				
View Person				

The Person Search window will appear. Search by BC PHN by entering the number in the **BC PHN field** and click **Search**.

If the patient cannot be found by PHN, click **Reset** and search by **MRN/Historical MRN** and **Name**.

If the patient still cannot be found, click **Reset** and search again by **Last Name, First Name** and **DOB.** 

BC PHN:	No persons found.	
MRN:		
Last Name:		
First Name:		
DOB:		
Gender:		
Postal/Zip Code:		
Any Phone Number:	No encounters found.	
Encounter #:		
Visit #:		
Historical MRN:		
Search Reset		
MPI Search		
	OK Canc	Add Person

Note: If this search returns any data, and none of them are the patient you are looking for, click on **Reset** before continuing. Always click **Reset** between searches if you find patient records.

4 Once you have determined that this patient has not previously been to a CST Cerner site as no search results are returned, click on the **MPI Search** button. This will search the Ministry's Registry through the Enterprise Master Patient Index (EMPI).

C Person Search	
BC PHN MRN: Lest Name RUBBLE Frit Name: BETTY 000: 120ec1917 Conder: Gender:	No persone found
Postal/Zip Code: Any Phone Number:	No encounters found.
Visk #: Historical MRN:	
Search Reset MPI Search	

5 The **Organization** dialogue box will display. Under the **Facility Name** tab, enter the **3 letter code** for the health care facility you wish to search in, then click on the **ellipsis** button.

Select the Facility you require then click on OK.

📳 Organization 🛛 💌
Please select the facility where you want to view person aliases.
Facility Name Facility Alias
LGH Lab Northmount
LGH Lions Gate Hospital
LGH Neuro Rehab Outpatient Clinic 🔹
Facility:
LGH Lions Gate Hospital
OK Cancel

6 The External MPI search window will appear momentarily. If the EMPI finds any similar matches, they will appear. Ensure you take the time to CAREFULLY review the patients displayed in the window.





#### Correct Patient is Found

1 If the correct patient appears from the External MPI search, click on the patient and click **Select**.

The demographic information from the EMPI will download and auto-populate the applicable fields.



🐓 Quick Reg											- 6
<b>4</b>											
Medical Record Number: 700008898	Encounter Number:	Last Name: RUBBLE	First Name: BETTY	Middle Name:	Preferred Name:	Previous Last Name:	Date of Birth: 27-Sep-1962	Age 55Y	Gender: Female	BC PHN: 9879897966	
ALERTS Patient Information	n Encounter Information Insura	nce Insurance Summary									
Encounter Type:	Medical Service:	Reason for Visit:									
Facility: LGH Lions Gate	Building:     LGH Lions Gate	Unit/Clinic:	Bed Availability	Room:	▼ Bed:	•					
Attending Provider:	Referring Provider:	Primary Care Provider (PCP)	PCP Verified?								
Comment Comment:											A
- Account Data											*
Registration Date: 13-Dec-2017	Registration Time:     12.36	Quick Reg User Name: Poon, Sylvia									

2 Select the **Encounter Information** tab:

- For the Encounter Type, select Data Storage.
- For Medical Service, select HIM Documentation

ALERTS Patient Information Encounter Information Insurance Insurance Summary	Encounter Information Insurance Insu
Encounter Type Medical Service: Reason for Visit: Descentorial	Medical Service Reasc
Deceased         Building:         Unit/Clinic:           Specimen         LGH Lions Gate <ul> <li>Cons Brouiders</li> </ul>	Hematology Hematology HIM Documentation Hospitalist Medicine Medical Imaging
ler Quick Reg	
Control Hade: Encode Hade: Encode Hade: For Hade: Note Hade:	ar Nare Date (Fin) Age. Einder EC Pitt 275ap-1922 (2) (2) Styr Feesal - St/7807/565
Encounter Type Madeul Service Filmen In Visit	
London     Tendy Building Unit Cleie     Tendy Building Unit Cleie     Tendy Building Balance Bed     Tend Produce     Tend     Tend Produce     Tend Produce     Tend     Tend Produce	
Alterdarg Provide: Releasing Provide: Primary Case Provide: (PCP): PCP Vielaed?	
Convert	
Accost Data - Population Dat Registration Tree: Quick Reg User Name: 104cc3077 © 12.3	

Note: It is important to note that all fields highlighted in yellow are mandatory fields.

3 The Registration Date and Time will auto-populate with the date/time you complete the Quick Reg.

Click **OK** to complete the conversation.



4 An information pop-up will display the **Encounter Number**.

Click OK.



Quick Reg	<b>—</b>
The following LGH Lions Gate Hospital aliases have be BETTY:	een assigned for RUBBLE,
Encounter Number: 700000016610 Visit Id: 700000016610	
	ОК

#### Correct Patient is NOT Found

HIM will only add a patient to the Cerner system if the following EMPI Minimum Data Set is available:

- Last Name
- First Name
- DOB
- Gender
- Full Address

If patient does not meet the above requirements there is a manual ROI log to track these request.

1 If the correct patient does NOT appear from the External MPI search, or after the initial thorough search of Cerner (i.e. if the patient is from out of country), click **Close** in the External MPI window to return to the **Cerner Person Search** screen.



<sup>2</sup> From the Cerner Person Search screen, click Add Person.

Person Search	
BC PHN:	No persons found from the MPI Search.
IRN:	
ast Name:	
RUBBLE	
irst Name:	
BAMM-BAMM	
108:	
22+eb-2000	
iende:	
'ostal/Zip Code:	
iny Phone Number:	No encounters found.
ncounter #:	
Ga th	
listorical MBN:	
Search Reset	
MPI Search	
	OK Cancel Add Person Add Encos

3 Complete the **Request PHN** window. Some data fields will auto-populate from the Search window, while other mandatory fields will be highlighted in yellow.

🗄 External MPI	
Request PHN	
* Last name: RUBBLE First name:	Address type:     Home     Mail Country:
BAMM-BAMM Middle name:	* Address 1:      301 Cobblestone Way
Date of birth (MM/DD/YYYY):     02 / 22 / 2000     v	Address 2:
Male V	Bedrock     Province/State: (Required when country is Canada or USA)     Louisiana     v
C.	Postal code (A#A #A#)/Zip code (#####): 70777

4 The **Quick Reg** Conversation will open.



br. Ouick Ren											
-S											
🔍 🗙 The PHN Request	was successful										
Medical Record Number. 700008961	Encounter Number:	Last Name: RUBBLE	First Name: BAMM-BAMM	Middle Name:	Preferred Name:	Previous Last Name:	Date of Bith 22-Feb-2000	Age:	Gender. Male	BC PHN: • 9876405925	
ALERTS Patient Informa	tion Encounter Information	Insurance Insurance Summary									
Encounter Type:	Medical Service:	Reason for Visit									
Facily: LGH Lions Gate	Building: 	Uni/Clinic:	Bed Availability	Room	ed ed	•					
Attending Provider:	Referring Provider:	Primary Care Provider	(PCP) PCP Verified?	•							
Comment:											*
Account Data Registration Date: 14-Dec-2017	Registration Time:	Quick Reg User Nam	2								

5 Select the **Encounter Information** tab:

- For the Encounter Type, select Data Storage.
- For Medical Service, select HIM Documentation

_	ALERTS Pr Encounter 1 Data Store Deceased Outside Ime Specimen	atient Information En yope M reference M r	counter Information ), edical Service: uilding: .GH Lions Gate	Reason for Unit/Clinic:	s Summary	] _	Encou Med HIM Her Her Med	ical Service Documentat pocumentat pitalist Medic dical Imaging	ion Reas	c		
🐓 Quick Reg						_						- @ <mark>×</mark>
🐵 🗙 The PHN Request was	s successful.											
Medical Record Number: 700008961	Encounter Number:	Last Name: RUBBLE	First Name: BAMM-BAMM	Middle Name:	Preferred Name:	Previous	Last Name:	Date of Birth: 22-Feb-2000	Age:	Gender: Male	BC PHN: • 9876405925	
ALERTS Patient Information	Encounter Information Insu	rance Insurance Summary										
Encounter Type: Data Storage	Medical Service: HIM Documentation	Reason for Visit:										
- Location	Building	Hot/Circic:		Boom	Bed							
LGH Lions Gate v	LGH Lions Gate	•	Bed Availability		•	•						
Attending Provider:	Referring Provider:	Primary Care Provider (PCP	PCP Verified?:	•								
- Comment												
												*
Account Data Registration Date: 14-Dec-2017	Registration Time: 16:35	Quick Reg User Name:										

6 The Registration Date and Time will auto-populate with the date/time you complete the Quick Reg.

Click **OK** to complete the conversation.

— Account Data ———			
Registration Date:	Registration Time:	Quick Reg User Name:	
13-Dec-2017	🗧 🔽 <u>12:36</u>	Poon, Sylvia	

7 An information pop-up will display the **Encounter Number**.

Click OK.



## ACTIVITY 4 – 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 4.1 – 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) Custom Medical Service Provider Group Query Relationship Scheduled		
	Back Next R	nish Cancel

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.

ustom Patient List		×
Care Teams Locations Medical Services Encounter Types Relationships Admission Criteria Discharged Criteria Use Best Encounter	☐ Care Team #1 ☐ Care Team #2 ☐ ENT	
Enter a name for the list: (Limited Research 1 - Albert Einstein	to 50 characters)	
	Back Next Finish Cance	si i

#### 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		

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
- Click ➡ to move it to the Active List 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.



Last update 2018/08/05 (N97)



vailable lists:	Active lists:		
	Research 1 - Alb	ert Einstein	
			1

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



## Activity 4.2 – Add / Remove Patients from Patient Lists

## **Adding Patients**

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



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	MBN	Name		DOB	Age	Gender	Addre:	s .	Address (2)	City
	2			9878216037	700001770	CSTPRODHIN	I, WILMADEMO	26-Jan-1984	33 Years	Female	987 SI	DE STREET		VANCO
MRN:														
700001770														
Last Name:	<b>\</b>													
First Name:														
DOB:														
икракрана														
Gender:	_													
Postal/Zip Code:														
Any Phone Number:	Fac		Enc	ounter #	Visit #	Enc Type	Med Se	Unit/Clini	ic F	Room	Bed	Est Arrival Da	e RegDa	lte
	- <b>A</b> L	GH Lions Ga	e 700	0000012223	700000001229	0 Outpatient	C Medicir	e LGH End	loscopy F	Procedure 1	01		10/18/2	2017 10
Encounter #:		GH PF Lab	7000	0000012214	700000001228	1 Outpatien	spirology	LGH PF	Lab				10/18/2	2017 9:4
		.GH Lions Ga	e 700	0000011217	700000001127	9 Inpatient	Ceneral Surgery	LGH 6W	6	307	03		10/2/2	017 9:16
Vice #		.GH Lions Ga	e 7000	0000002713	700000000272	9 Inpatient	zzInternal Medic	ine LGH ECO	2 2	224	01		1/19/20	017 12:0
v lok w.	<u>//</u>	.GH Lions Ga	e 7000	0000002712	700000000272	8 Inpatient	Emergency	LGH AS(	C 4	ASC .	02		1/19/2	017 12:0
10 A 1 A 10 B 10		GH Evergree	n /UUI	0000002/11	70000000272	7 Inpatient	Hesidential	EGH ES:	3 E	308	01		1/19/20	J17120
Historical MHIN:		GUE	n 7000	0000002710	700000000272	6 Inpatient	Residential	EGHES	2 6	208	01		1/19/20	J17 120
		CULE.	n 7000	0000002709	70000000272	5 Inpatient	Residential	EGHEN	2 8	:204	04		1/19/20	017 11:0
Search Becet		GH Lions Ga	n 7000	0000002708	70000000272	2 Inpatient	Neonatology	L GH AE	1 6	192	04		1/13/20	017 11:0 017 11:E
		GH Lione Ga	<ul> <li>7000</li> <li>7000</li> </ul>	0000002707	70000000272	2 Inpatient	22ENT	LGH 3PC	1 3	206	02		1/19/2	017 11:5
	-1	GH Lione Ga	<ul> <li>7000</li> </ul>	0000002705	70000000272	1 Inpatient	Dermatologu	LGH 2E	, .	218	02		1/19/20	017 11-3
	<b>3</b>	GH Lions Ga	e 700	0000002627	700000000264	3 Inpatient	Gastroenterolog	LGH 5E	Ę	518	01		1/13/2	017 3:39

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

4 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.

Pat	ient	t List									
ß	P	>> 💐 🌴 X	i 🔹 🗉 🖬 🖷 🖬		2						
Res	ear	ch 1 - Albert Eir	nstein MCFD - Katniss Ev	erdeen							
1	<b>^</b>	Location	Name	MRN	Encounter #	Age	DOB	Admitted	Admitting Physician	Reason for Visit	Primary Care Physician Visitor Status
1	7	SGH MS 111 01	CSTPRODHIM, SALLY	700000379	9 7000000007384	66 years	20-Sep-1951	11-Jul-2017 00:49 PDT		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	Ĵ	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.

Click on the Remove Patie	nt icon 🎽 .		
Patient List			
/ • • » • • • • • • • • • • • • • • • •			
Research 1 - Albert Finstein MCED - Katnics Everdeen			
Nescaren 1 Maler enisten Mei D - Ratinss Eveldeen			
Location Name MRN Enco	Inter# Age DOB Admitted		
LGH NSH HS2 0 CSTLABVIRTUAL, CANDY 700003798 70000	00005321 42 years 26-May-197: 29-May-2017 08:15 PD		
SGH MS 111 01 CSTREODHIM SALLY 700001800 70000	00002005 27 years 01-Jan-1990 16-Jan-2017 11:51 PS1		
C LGH 6W 607 03 CSTPRODHIM, WILMADEMO 700001770 70000	00011217 33 years 26-Jan-1984 02-Oct-2017 09:16 PD		
LGH ED Hold A CSTPRODREGEMPI, SQTWO 700000220 70000	00003200 27 years 01-Jan-1990 21-Feb-2017 11:21 PS		
	Patient List		
		à Ē   🛯 🚮   🗳	
	Research 1 - Albert Einstein MCFD - Ka	atniss Everdeen	
	Location Name LGH NSH HS2 0 CSTLABVIRTUAL, CA LGH ASC ASC 0 CSTLOGINVSI, KING	MRN         Encounter #         Age           NDY         700003798         700000005321         42 ye           PHILIP         700001800         700000002683         27 ye	DOB Admitted ars 26-May-197! 29-May-2017 08:15 PD' ars 01-Jan-1990 18-Jan-2017 11:51 PST
	LGH 6W 607 03 CSTPRODHIM, WILM	ADEMO 700001770 7000000011217 33 ye	ars 26-Jan-1984 02-Oct-2017 09:16 PDT
	LGH ED Hold A CSTPRODREGEMPI,	SQTWO 700000220 700000003200 27 ye	ars 01-Jan-1990 21-Feb-2017 11:21 PST

## Activity 4.3 – 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
	» 🗗 » 🔍 🌴 🦄   🐟   🗉 🗈 🖻 🗈   💷 🚮   🚨
	Research 1 Albert Einstein MCFD - Katniss Everdeen
	Location Name MRN Encounter # Age DOB Admitted Admitting Physician R
3	r an
	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.

Customize Patient List Propertie	;
Care Teams Locations Locations Encounter Types Admission Criteria Discharged Criteria Use Best Encounter	Care Team #1 Care Team #2 ENT
Enter a name for the list: (Limi MCFD - Katniss Everdeen & I	ted to 50 characters) Peeta Mellark OK Cancel

## **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  $\overset{\mathscr{P}}{\sim}$  .

2





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> to</a> move it to the Available lists pane.

P Modify Patient Lists		
Available lists:	A-11-C 11515;	
	Research 1 - Albert Einstein McChristian sund send McChristian sund send McChristian send M	8
Modify Patient Lists Available lists:	Active lists	OK Cancel
MCFD - Katniss Everdeen	Research 1 - Albert Einstein	
	(d) (d)	0
	New	OK Cancel

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		×
Available lists: MCED - Katniss Everdeen Delete Patient List	Active lists: Research 1 - Albert Einstein	
		<b>^</b>
	New OK Cance	2

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 4.4 – Granting Proxy to a Patient List

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

1	From the P	atient List	wine	dow, c	lick (	on the	Properties	s icon 🗳 .
	Patient List							
	A 🖓 🖉 🖉		Image: A state of the state	2				
	Research 1 - Albert Eins	tein MCFD - Katniss Ev	/erdeen					
	Location	Name	MRN	Encounter #	Age	DOB /		
	LGH 2E 210 02	CSTPRODPAJARO, VALER	700000160	700000000177	7 17 years	11-Feb-20002		
	LGH LD LDR2 01A	CSTPRODMAT, BABY GIRL	700001780	700000002645	5 10 month	s 16-Jan-2017 1		
	LGH 3W 305 01B	CSTPRODREG, TESTDIREC	700001860	0 700000002803	3 37 years	22-Feb-19802		

2 The Customize Patient List Properties dialogue box opens.

Click the **Proxy** tab to open the Proxy Tool.

Click New.

Name (Lim Press End Date	@ Group
	Provider
	Access:
	From:
	To:

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:		
INPRIM	debbie			
Title:	an	Alias type:		New Provider
				Preview
Usemame:				Class
				Liear
E Limit by g	roup	No data fi	tering	
🔲 Limit bu o	or and in the second	No data B	haring	
can by b	- The second second	a No data n		
Limit by p	osition	No data fi	tering	
📃 Limit by re	slationship	No data fi	tering	
Name Kwan Debbi	Aliases	Services F	Positions	Organizations
INTIGH, L'OUU	•		In The loger o	
٠	11			

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



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 Dat	Group  Provider  Kwan, Debbie  Acces  Read  Full Access  Maintain  Dead  Full Access  Maintain  Dead  Full Access  Maintain  Dead  Full Access  Maintain  Dead  Full Access  Maintain  Full Access  Full Access  Maintain  Full Access  Full Access  Full A
	Nov

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.

Your proxy will be displayed.

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

7



Customize Patient List Properties	×
Custom Patient List Proxy	
Name (Lim Access End Date	Group
Kwan, Debbe Keau OI-Feb	Provider
	Access:
	From:
	To:
	New Apply
	OK Cancel



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					
∥ 압 » 및 <del>책</del> 책   ♠	🖉 🗊 🖻 🖬	1 🖬 🖬 🛛	1		
test Oncology (Atha	basca,				
Name	Location	DOB	Age	Gender	Medical Se
Name PHSAMOCKXTEST, docone	Location 3B-CH 15 OF01	DOB 19-Feb-2003	Age 10 years	Gender Male	Medical Se Paediatric

## Activity 4.5 – Printing a Patient List

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

Task Edit View Patient Chart Links Patient List Help	
🖂 Message Centre 🎍 Patient List 🎬 LearningLIVE 🝦 👯 PACS 💐 FormFast WFI 🖕	
📲 Exit 🔒 PM Conversation 🔹 🏣 Communicate 🖌 📾 Discern Reporting Portal 🔚 Documents 👹 Scheduling Appointment Book 🚊 Medical Record Request 🖕	$\frown$
	Rin Recent + Name + 9
Patient List	🗇 Full screen 👼 Print 💸 3 hours 34 minutes ago
多日 >> 二 キャーター 🗂 🖱 🎭 🖻   💷 🛃 🚨	

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

P Print	<b>—</b>
Printer: Igh_him_II	OK Cancel
	SerAsberdar



## Appendix A: Listing of Cerner Documents for External Distribution

Model System- ESH Clinical Documents	Model System-ESH Clinical Documents (Child 1)	Model System- ESH Clinical Documents (Child	Outbound Alias	Care Connect	Excelleris	Comments
Admission Notes	Admission Note Provider	2) 	83805-2	Yes	Yes	
Emergency Documentation	ED Note Provider		28568-4	Yes	Yes	
	ED WorksafeBC Note		52064-3	Yes	Yes	
Consult Notes	Allergy Immunology Consult		77429-9	Yes	Yes	
	Anesthesiology Consult		77403-4	Yes	Yes	
	BMT Consult		X10803	Yes	Yes	
	Cardiology Consult		34099-2	Yes	Yes	
	Cardiothoracic Consult		34849-0	Yes	Yes	
	Cardiovascular Surgery Consult		X10810	Yes	Yes	
	Colorectal Surgery Consult		78250-8	Yes	Yes	
	Consult Note Other		11488-4	Yes	Yes	
	Critical Care Consult		78496-7	Yes	Yes	
	Dermatology Consult		34758-3	Yes	Yes	
	Endocrinology Consult		34879-7	Yes	Yes	
	ENT Consult		34816-9	Yes	Yes	
	Family Medicine Consult		78253-2	Yes	Yes	
	Gastroenterology Consult		34761-7	Yes	Yes	
	General Medicine Consult		34764-1	Yes	Yes	
	General Surgery Consult		34847-4	Yes	Yes	
	Genetic Consult		78254-0	Yes	Yes	
	Geriatric Medicine Consult		34776-5	Yes	Yes	
	Gynecology Consult		34777-3	Yes	Yes	
	Hematology Consult		78251-6	Yes	Yes	
	Infection Prevention and Control Consult		X10898	Yes	Yes	

Infectious Diseases Consult		34781-5	Yes	Yes	
Internal Medicine Consult		85238-4	Yes	Yes	
Interventional Radiology Consult		72555-6	Yes	Yes	
Laboratory Medicine Consult		X10830	Yes	Yes	
Long Term Care Consult		51854-8	Yes	Yes	
Medical Microbiology Consult		81193-5	Yes	Yes	
Neonatal Consult		68685-7	Yes	Yes	
Nephrology Consult		34795-5	Yes	Yes	
Neurology Consult		34797-1	Yes	Yes	
Neurosurgery Consult		34798-9	Yes	Yes	
Obstetrics Consult		X10837	Yes	Yes	
Occupational Medicine Consult		34803-7	Yes	Yes	
OMFS Consult		34812-8	Yes	Yes	
Oncology Consult Notes	Oncology Gynecologic Consult	80396-5	Yes	Yes	
	Oncology Hereditary Consult	51969-4	Yes	Yes	
	Oncology Medical Consult	34805-2	Yes	Yes	
	Oncology Pain and Symptom Consult	X10896	Yes	Yes	
	Oncology Radiation Consult	34831-8	Yes	Yes	
	Oncology Surgical Consult	80801-4	Yes	Yes	
	Oncology Other Consult	X10889	Yes	Yes	
Ophthalmology Consult		34807-8	Yes	Yes	
Orthopedic Surgery Consult		34814-4	Yes	Yes	
Pain Management Consult		78567-5	Yes	Yes	
Pain Service Consult		X10901	Yes	Yes	
Palliative Medicine Consult		78568-3	Yes	Yes	
Pediatrics Consult		78726-7	Yes	Yes	


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	Perinatology Consult		80673-7	Yes	Yes	
	Physical Med and Rehab Consult		34822-7	Yes	Yes	
	Plastic Surgery Consult		34826-8	Yes	Yes	
	Podiatry Consult		34828-4	Yes	Yes	
	Psychiatry Consult		34788-0	Yes	Yes	
	Respirology Consult		34103-2	Yes	Yes	
	Rheumatology Consult		34839-1	Yes	Yes	
	Spine Surgery Consult		X10885	Yes	Yes	
	Sports Medicine Consult		78738-2	Yes	Yes	
	Thoracic Surgery Consult		X10870	Yes	Yes	
	Trauma Consult		78732-5	Yes	Yes	
	Urology Consult		34851-6	Yes	Yes	
	Vascular Surgery Consult		34853-2	Yes	Yes	
Clinical Pharmacy Notes	Pharmacist Discharge Medication Review		X10862	Yes	Yes	
Clinic Notes	Allergy Immunology Clinic Note		68629-5	Yes	Yes	
	BMT Clinic Notes	BMT Treatment Clinic Note	X10805	Yes	Yes	
		BMT Follow-Up Clinic Note	68554-5	Yes	Yes	
		BMT Medical Daycare Clinic Note	X10804	Yes	Yes	
		BMT Clinical Trial Clinic Note	X10801	Yes	Yes	
	Cardiology Clinic Note		34752-6	Yes	Yes	
	Cardiothoracic Clinic Note		X10809	Yes	Yes	
	Cardiovascular Surgery Clinic Note		83535-5	Yes	Yes	
	Clinic Note Other		75476-2	Yes	Yes	
	Colorectal Surgery Clinic Note		X10813	Yes	Yes	
	Dermatology Clinic Note		34759-1	Yes	Yes	
	Endocrinology Clinic Note		34898-7	Yes	Yes	
	ENT Clinic Note		34817-7	Yes	Yes	

Family Medicine Clinic Note		85437-2	Yes	Yes	
Gastroenterology Clinic Note		34762-5	Yes	Yes	
General Medicine Clinic Note		34766-6	Yes	Yes	
General Surgery Clinic Note		34848-2	Yes	Yes	
Genetic Clinic Note		68656-8	Yes	Yes	
Geriatric Medicine Clinic Note		84119-7	Yes	Yes	
Gynecology Clinic Note		X10823	Yes	Yes	
Hematology Clinic Note		X10826	Yes	Yes	
Infectious Diseases Clinic Note		34782-3	Yes	Yes	
Internal Medicine Clinic Note		75435-8	Yes	Yes	
Neonatal Clinic Note		85438-0	Yes	Yes	
Nephrology Clinic Note		34796-3	Yes	Yes	
Neurology Clinic Note		34905-0	Yes	Yes	
Neuropsychology Clinic Note		X10834	Yes	Yes	
Neurosurgery Clinic Note		34799-7	Yes	Yes	
Obstetrics Clinic Note		X10836	Yes	Yes	
Occupational Medicine Clinic Note		84390-4	Yes	Yes	
OMFS Clinic Note		X10841	Yes	Yes	
Oncology Clinic Notes	Onc. Gynecologic Consult Clinic Note	80396-5	Yes	Yes	
	Onc. Gynecologic Treatment Clinic Note	X10845	Yes	Yes	
	Onc. Gynecologic Follow-Up Clinic Note	X10844	Yes	Yes	
	Onc. Gynecologic Clinical Trial Note	X10843	Yes	Yes	
	Onc. Hereditary Consult Clinic Note	51969-4	Yes	Yes	
	Onc. Hereditary Follow-Up Clinic Note	X10846	Yes	Yes	
	Onc. Medical Consult Clinic Note	X10889	Yes	Yes	





	Onc. Medical Daycare Clinic Note	X10848	Yes	Yes	
	Onc. Medical Treatment Clinic Note	X10850	Yes	Yes	
	Onc. Medical Follow-Up Clinic Note	X10849	Yes	Yes	
	Onc. Medical Clinical Trial Note	X10847	Yes	Yes	
	Onc. Pain/Symptom Follow-Up Clinic Note	X10894	Yes	Yes	
	Onc. Pain/Symptom Clinical Trial Note	X10895	Yes	Yes	
	Onc. Radiation Consult Clinic Note	34831-8	Yes	Yes	
	Onc. Radiation Treatment Clinic Note	78656-6	Yes	Yes	
	Onc. Radiation Follow-Up Clinic Note	X10851	Yes	Yes	
	Onc. Radiation Therapy Completion	68602-2	Yes	Yes	
	Onc. Radiation Clinical Trial Note	X10856	Yes	Yes	
	Onc. Surgical Consult Clinic Note	80801-4	Yes	Yes	
	Onc. Surgical Follow-Up Clinic Note	X10853	Yes	Yes	
	Onc. Surgical Clinical Trial Note	X10852	Yes	Yes	
	<i>Onc. Other Follow- Up Clinic Note</i>	X10891	Yes	Yes	
	Onc. Other Treatment Clinic Note	X10892	Yes	Yes	
	Onc. Other Clinical Trial Clinic Note	X10890	Yes	Yes	
Ophthalmology Clinic	Note	34808-6	Yes	Yes	
Orthopedic Surgery C	linic Note	34815-1	Yes	Yes	
Pain Management Cli	inic Note	34858-1	Yes	Yes	
Palliative Medicine Cl	inic Note	85435-6	Yes	Yes	

	Pediatric GI Clinic Note	68741-8	Yes	Yes	
	Pediatric ID Clinic Note	68761-6	Yes	Yes	
	Pediatrics Clinic Note	68818-4	Yes	Yes	
	Physical Med and Rehab Clinic Note	34823-5	Yes	Yes	
	Plastic Surgery Clinic Note	34827-6	Yes	Yes	
	Podiatry Clinic Note	34829-2	Yes	Yes	
	Psychiatry Clinic Note	28628-6	Yes	Yes	
	Respirology Clinic Note	34830-0	Yes	Yes	
	Rheumatology Clinic Note	34840-9	Yes	Yes	
	Sleep Medicine Clinic Note	85864-7	Yes	Yes	
	Spine Surgery Clinic Note	X10884	Yes	Yes	
	Sports Medicine Clinic Note	X10869	Yes	Yes	
	Televisit Note	75496-0	Yes	Yes	
	Thoracic Surgery Clinic Note	34850-8	Yes	Yes	
	Trauma Clinic Note	34754-2	Yes	Yes	
	Urgent Care Clinic Note	75504-1	Yes	Yes	
	Urology Clinic Note	34852-4	Yes	Yes	
	Vascular Surgery Clinic Note	84050-4	Yes	Yes	
	Wound Clinic Note	X10877	Yes	Yes	
Communication Notes	BMT Communication	X10802	Yes	Yes	
	Oncology Conference Note	84138-7	Yes	Yes	
	Oncology Gynecologic Communication	X10854	Yes	Yes	
	Oncology Medical Communication	X10855	Yes	Yes	
	Oncology Radiation Communication	X10857	Yes	Yes	
	Oncology Surgical Communication	X10858	Yes	Yes	
	Oncology Other Communication	X10888	Yes	Yes	
	Onc. Pain and Symptom Communication Note	X10893	Yes	Yes	



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Cardiology Procedures	Cardiology Procedure Note	75426-7	Yes	Yes	
Gastroenterology Procedure	Colonoscopy	X10812	Yes	Yes	
	Endoscopic Procedure Note	X10817	Yes	Yes	
	Endoscopic Retrograde Cholangiopanc ERCP	X10818	Yes	Yes	
	Endoscopic Ultrasound EUS-GI	X10897	Yes	Yes	
	Esophageal Manometry	X10820	Yes	Yes	
	Esophagogastroduodenoscopy EGD	X10821	Yes	Yes	
	Flexible Sigmoidoscopy	X10822	Yes	Yes	
	Gastroenterology Procedure Note	78317-5	Yes	Yes	
	lleoscopy	X10827	Yes	Yes	
	Panendoscopy	X10860	Yes	Yes	
	Sigmoidoscopy	X10867	Yes	Yes	
Genecology Procedures	Colposcopy	29757-2	Yes	Yes	
	Gynecology Procedure Note	X10824	Yes	Yes	
Neurology Procedures	Brainstem Electrical Response	X10806	Yes	Yes	
	Electroencephalography EEG	11523-8	Yes	Yes	
	Electromyogram	18749-2	Yes	Yes	
	Nerve Conduction	29755-6	Yes	Yes	
	Neurology Procedure Note	78475-1	Yes	Yes	
	Visual Evoked Potential VEP	X10875	Yes	Yes	
Respirology Procedures	Arterial Blood Gas Results Impression	28570-0	Yes	Yes	
	Bronchoscopy	18744-3	Yes	Yes	
	Methacholine Challenge Test	X10833	Yes	Yes	
	MIP/MEP Interpretation	28570-0	Yes	Yes	
	Oximetry Study	X10859	Yes	Yes	
	Pulmonary Function Studies	80792-5	Yes	Yes	
	Respirology Procedure Note	 80798-2	Yes	Yes	

	Sleep Study	28633-6	Yes	Yes	
Other Specialty Procedures	Abdominal Paracentesis Procedure Note	X10887	Yes	Yes	
	Allergy Immunology Procedure Note	68630-3	Yes	Yes	
	Anesthesiology Procedure Note	84062-9	Yes	Yes	
	Colorectal Surgery Procedure Note	84074-4	Yes	Yes	
	Critical Care Procedure Note	77422-4	Yes	Yes	
	Dermatology Procedure Note	78314-2	Yes	Yes	
	Electroretinography ERG	X10816	Yes	Yes	
	Endocrinology Procedure Note	78321-7	Yes	Yes	
	Endovascular Procedure Note	X10819	Yes	Yes	
	ENT Procedure Note	78655-8	Yes	Yes	
	Family Medicine Procedure Note	78315-9	Yes	Yes	
	General Medicine Procedure Note	78320-9	Yes	Yes	
	General Surgery Procedure Note	78322-5	Yes	Yes	
	Geriatric Medicine Procedure Note	82355-9	Yes	Yes	
	Infectious Diseases Procedure Note	78318-3	Yes	Yes	
	Internal Medicine Procedure Note	85236-8	Yes	Yes	
	Lumbar Puncture Procedure Note	X10832	Yes	Yes	
	Neonatal Procedure Note	78473-6	Yes	Yes	
	Nephrology Procedure Note	78474-4	Yes	Yes	
	Neuropsychology Procedure Note	X10835	Yes	Yes	
	Neurosurgery Procedure Note	68692-3	Yes	Yes	
	Obstetrics Procedure Note	X10839	Yes	Yes	
	OMFS Procedure Note	84379-7	Yes	Yes	
	Oncology Procedure Note	78478-5	Yes	Yes	





	Ophthalmology Procedure Note	78657-4	Yes	Yes	
	Orthopedic Surgery Procedure Note	84374-8	Yes	Yes	
	Pain Management Procedure Note	68714-5	Yes	Yes	
	Palliative Medicine Procedure Note	82357-5	Yes	Yes	
	Pediatrics Procedure Note	68820-0	Yes	Yes	
	Plastic Surgery Procedure Note	83854-0	Yes	Yes	
	Physical Med and Rehab Procedure Note	83728-6	Yes	Yes	
	Podiatry Procedure Note	28625-2	Yes	Yes	
	Procedure Note Other	28570-0	Yes	Yes	
	Psychiatry Procedure Note	83891-2	Yes	Yes	
	Rheumatology Procedure Note	78660-8	Yes	Yes	
	Sleep Medicine Procedure Note	X10868	Yes	Yes	
	Spine Surgery Procedure Note	X10900	Yes	Yes	
	Sports Medicine Procedure Note	79267-1	Yes	Yes	
	Trauma Procedure Note	78240-9	Yes	Yes	
	Urgent Care Procedure Note	X10874	Yes	Yes	
	Urology Procedure Note	78659-0	Yes	Yes	
	Vascular Surgery Procedure Note	84053-8	Yes	Yes	
Nursing Documentation	Nursing Narrative Note	34746-8	PSA only	No	As per "CST-12796 Implement a Second Filter for MH Nursing/Allied Health Dynamic Documentation to CareConnect", only "Medical Service = Psychiatry" goes to CareConnect, none goes to Excelleris.

Allied Health Documentation	Mental Health Counsellor Note	78309-2	PSA only	No	As per "CST-12796 Implement a Second Filter for MH Nursing/Allied Health Dynamic Documentation to CareConnect", only "Medical Service = Psychiatry" goes to CareConnect, none goes to Excelleris.
	Occupational Therapy Note	28578-3	PSA only	No	As per "CST-12796 Implement a Second Filter for MH Nursing/Allied Health Dynamic Documentation to CareConnect", only "Medical Service = Psychiatry" goes to CareConnect, none goes to Excelleris.
	Psychology Assessment	83906-8	Yes	Yes	
	Psychology Note	83905-0	Yes	No	As per PARIS-Cerner Information Sharing Requirements & CST-15048 Mental Health Document Type Audo- Distribution to Excelleris, Psychology Note should go to CareConnect only, and not to Excelleris.
	Social Work Note	28656-7	PSA only	No	As per "CST-12796 Implement a Second Filter for MH Nursing/Allied Health Dynamic Documentation to CareConnect", only "Medical Service = Psychiatry" goes to CareConnect, none goes to Excelleris.





Interdisciplinary Documentation	Interdisciplinary Care Plan	81200-8	PSA only	No	As per "CST-12796 Implement a Second Filter for MH Nursing/Allied Health Dynamic Documentation to CareConnect", only "Medical Service = Psychiatry" goes to CareConnect, none goes to Excelleris.
Maternity Documentation	Obstetrics Delivery Note	X10838	Yes	Yes	
	Labour and Birth Summary	57057-2	Yes	Yes	
Discharge Documentation	Discharge Summary	18842-5	Yes	Yes	
Surgical Documentation	Operative Report	11504-8	Yes	Yes	
Anesthesia Records	Anesthesia Record	11485-0	Yes	Yes	
Letters	Letter Provider	75475-4	Yes	Yes	
Rehabilitation Notes	Cardiology Rehab Note	X10808	Yes	Yes	
Referral and Transfer Documentation	Transfer Note	18761-7	Yes	Yes	