

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

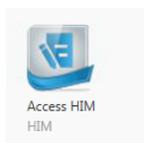
Overview

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

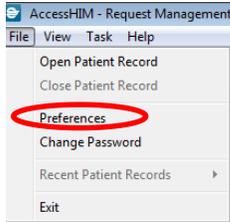
- 1 From the Citrix StoreFront, select the AccessHIM icon.



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

Activity 1.2 – Setting Access HIM General Preferences

- 1 From the File menu select **Preferences**.

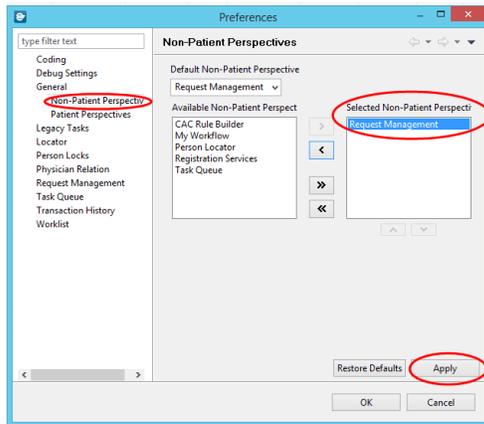


- 2 Expand **General** in the navigation pane on the left. Click Non-Patient Perspectives.

- 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.



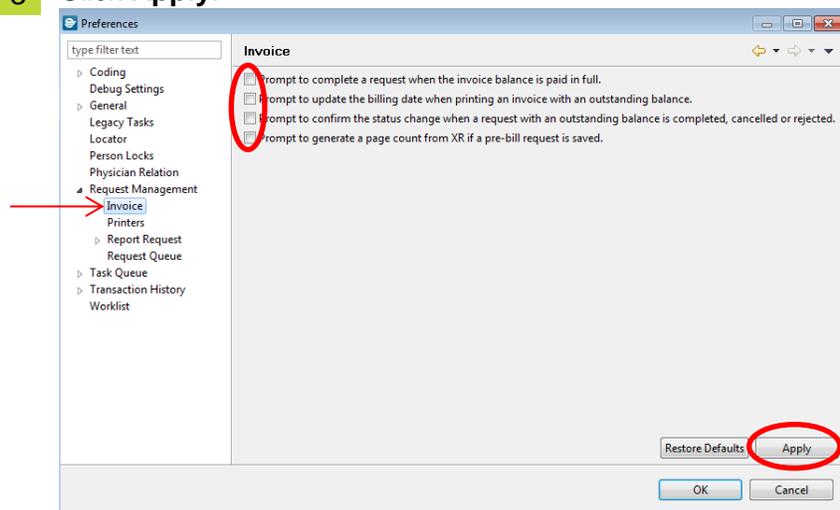
Click **Apply**.

- 5

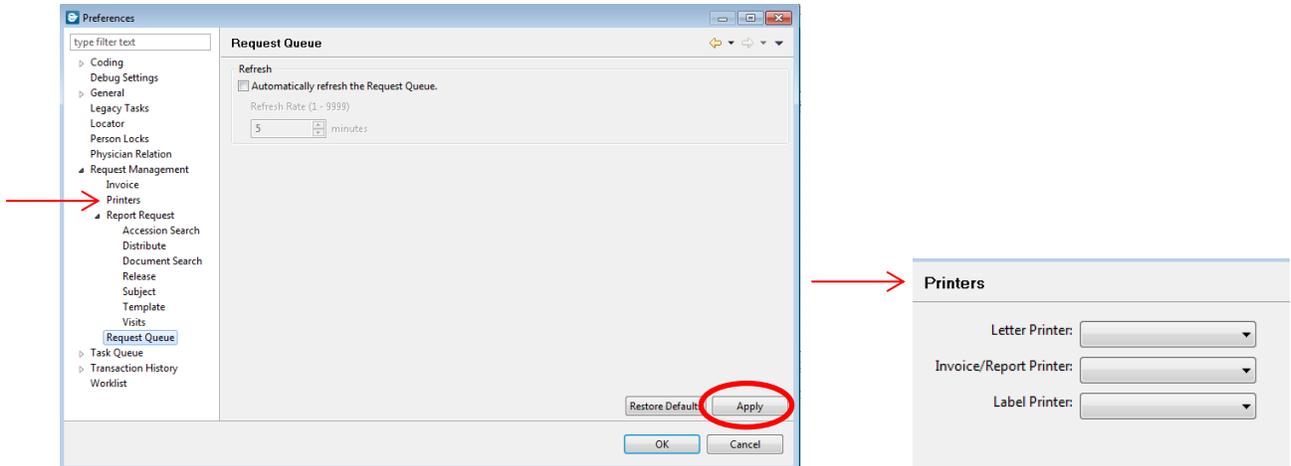
Activity 1.3 – Setting Request Management Preferences

- 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

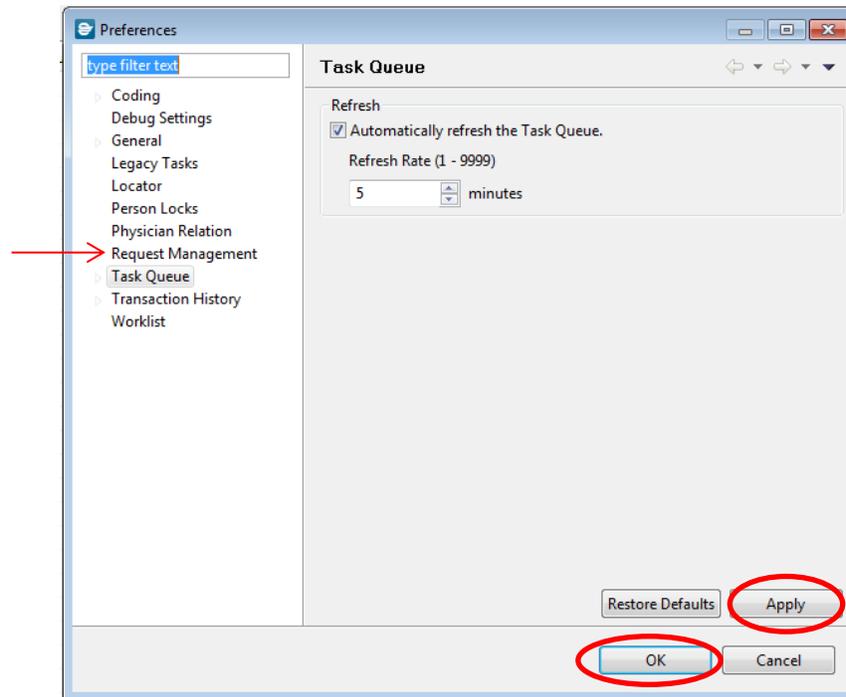
- 3 Click **Apply**.



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

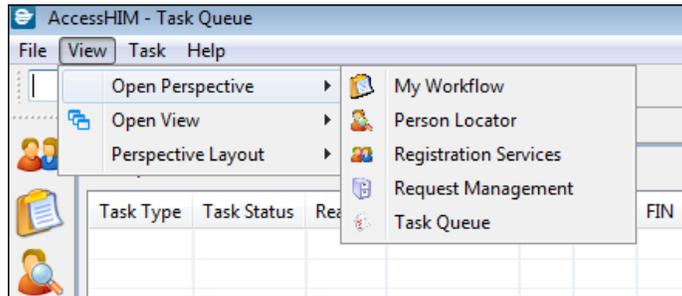


- 5 Select **Request Queue** to select whether to automatically refresh the **Request Queue** and select frequency of refresh. Select 5 minutes. Click **Apply** and Click **Ok**.



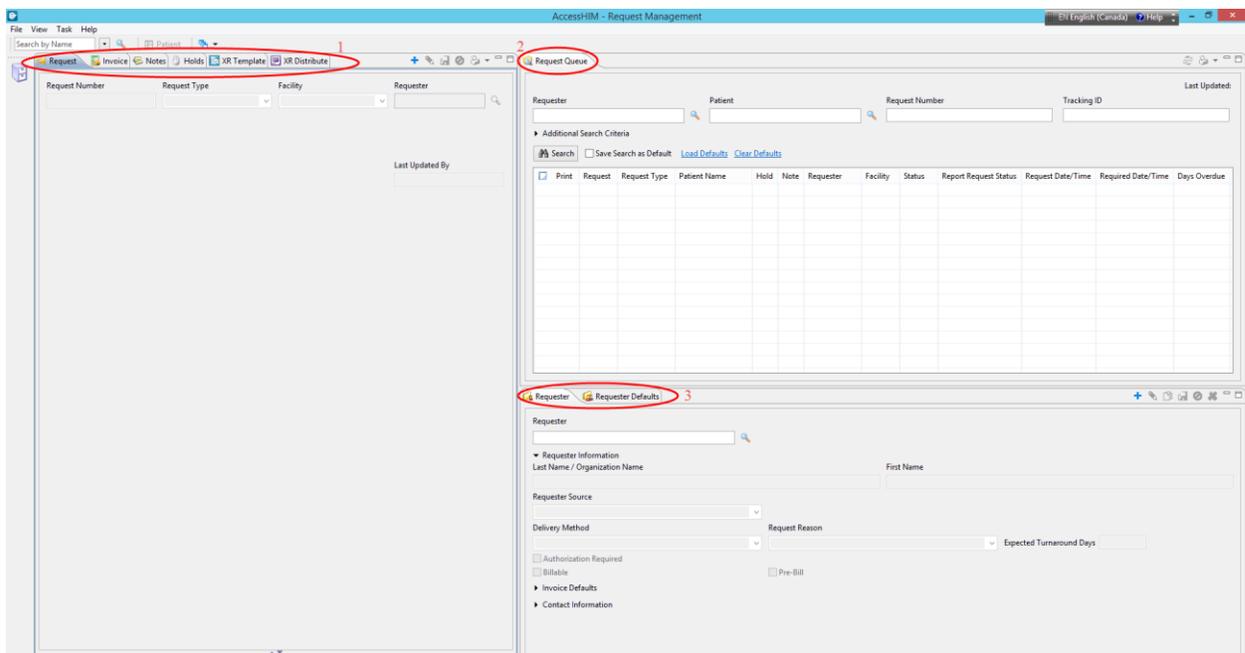
Activity 1.4 – Open the Request Management Perspective

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



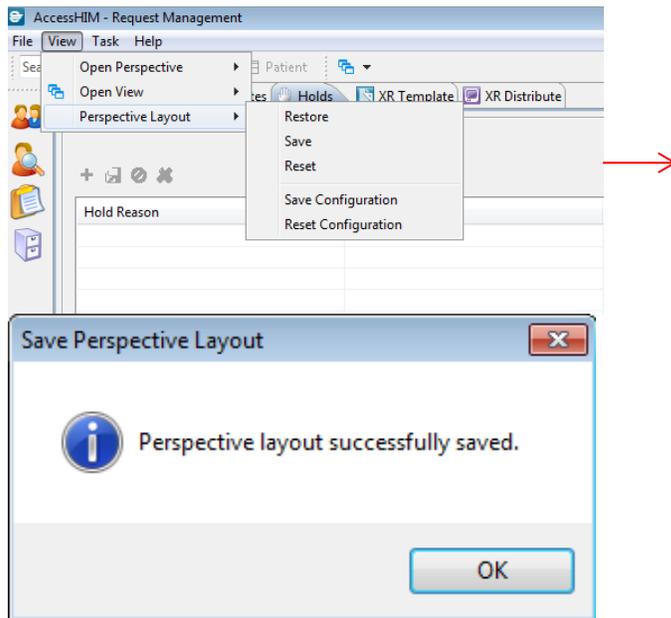
- 2 The Request Management perspective displays. The Request Management perspective is comprised of nine Views that are divided in three panes:

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



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.



- 3 Click **OK**.

Note: 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 .

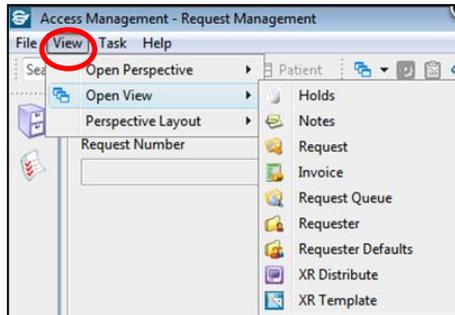


Open a View

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

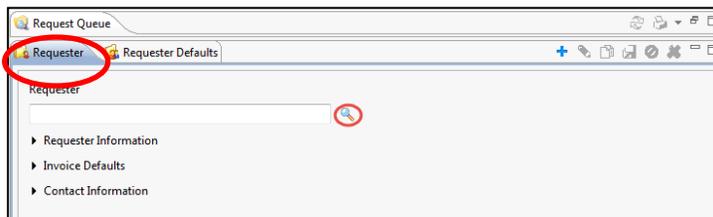
Open View from the View menu.

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

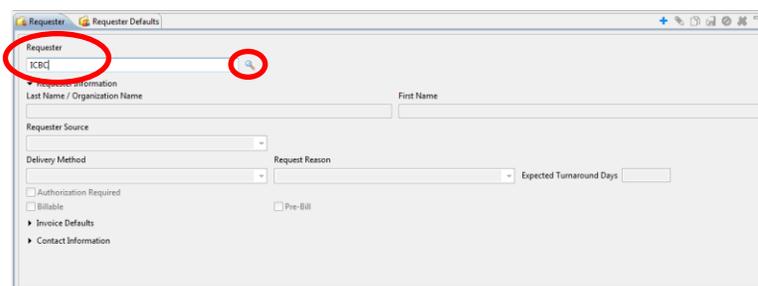


Activity 1.5 - Search for a Requester

- 1 To search for a requester, open the Requester view.



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



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

Expanded Requester Search

Search for a Requester

Requester Name: ICBC

Requester Source: ICBC, New Westminister

Request Reason: Insurance Claim

State: British Columbia

Zip Code: V6C 2K1

MRN: [Empty]

SSN: [Empty]

Date of Birth: [Empty]

Gender: [Empty]

Search: [Button] Clear: [Button]

Search Additional

Search Persons

Search Organizations

Name	Requester Source	Request Reason	SSN	MRN	Gender	Date of Birth
ICBC, New Westminister	Insurance Company	Insurance Claim				
ICBC, North Vancouver - Esplanade	Insurance Company	Insurance Claim				
ICBC, North Vancouver - Lloyd	Insurance Company	Insurance Claim				
ICBC, Penticton	Insurance Company	Insurance Claim				
ICBC, Port Alberni	Insurance Company	Insurance Claim				
ICBC, Powell River	Insurance Company	Insurance Claim				

Address(es)

Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City	State
Business	Attention	151 Esplanade W			North Vancouver	British Colum

Phone Number(s)

Type	Phone Number	Extension	Contact
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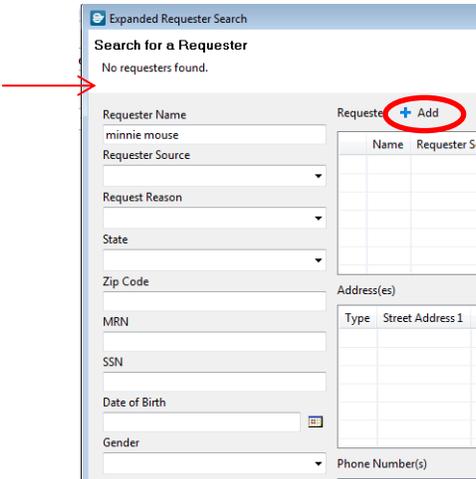
Select: [Button] Cancel: [Button]

- 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.

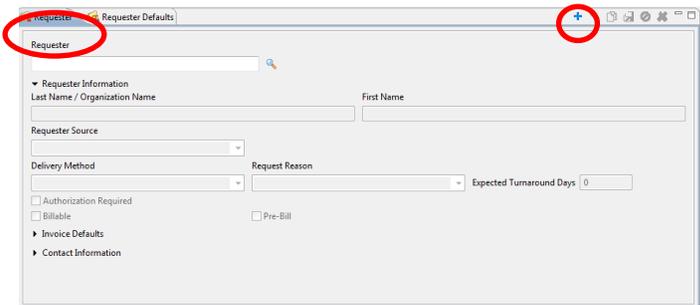
Activity 1.6 – Add a Requester

- 1 To add a requester, open the Requester view.
- 2 Search for the requester following the steps above in Activity 1.5 – Search for Requester.

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

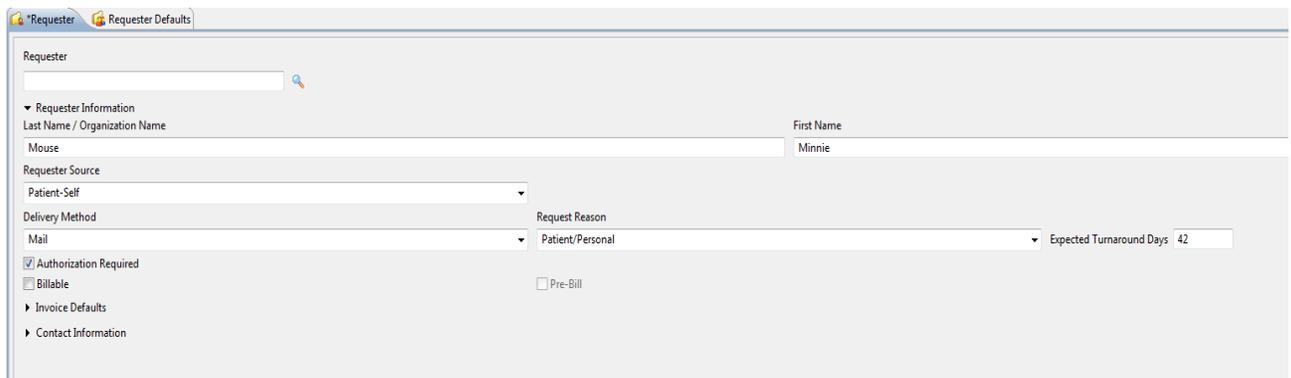


Note: It is also possible to add a new requester by clicking the Add Requester button in the upper-right corner of the Requester view.



4 The Expanded Requester Search dialog box closes.

5 In the Requester view, expand the Requester Information composite.



- Enter **Requester Name / Organization**

Note: 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
FVDC	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

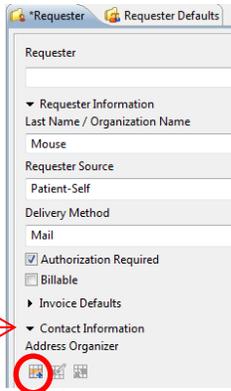
- Select a **Requester Source**
 - If the Requester Defaults have been previously configured for the Requester Source, the defined defaults are populated.
- If the Requester predefined settings have not been previously configured or require updating, click Modify icon , then select the appropriate field.
- 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.



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



- 8 Enter the **Address Information** and click **OK**.

Note: Follow EMPI Standards for Patient and Address Entry.

Common Address Scenarios:

- ❖ Typical Patient Address:

▼ Address Details

Address Type

Street Address 1

Street Address 2

Street Address 3

Street Address 4

City

State

Zip Code

Country

❖ Business Address with Attention to:

▼ Address Details

Address Type

Street Address 1

Street Address 2

Street Address 3

Street Address 4

City

State

Zip Code

Country

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

Street Address 1

Street Address 2

Street Address 3

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

Type	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 ...	<input type="checkbox"/>	<input type="checkbox"/>

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.

Contact Information
Address Organizer

Type	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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Billing	Attention: Mickey Mouse	4500 Oak Street			Vancouver	British Colu...	Canada	V6H 3N1	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

Address Organizer

Type	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 ...	<input type="checkbox"/>	<input type="checkbox"/>

Phone Organizer

Type	Phone Number	Extension	Contact	Billing Phone	Mailing Phone	Billing Fax	Mailing Fax

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 **Phone Number** and click **OK**.

Phone Details

Phone Type: Business

Phone Number: (604)988-3131

Extension:

Contact:

OK 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

Type	Phone Number	Extension	Contact	Billing Phone	Mailing Phone	Billing Fax	Mailing Fax
Business	(604)988-3131			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Activity 1.7 – Modify a Requester

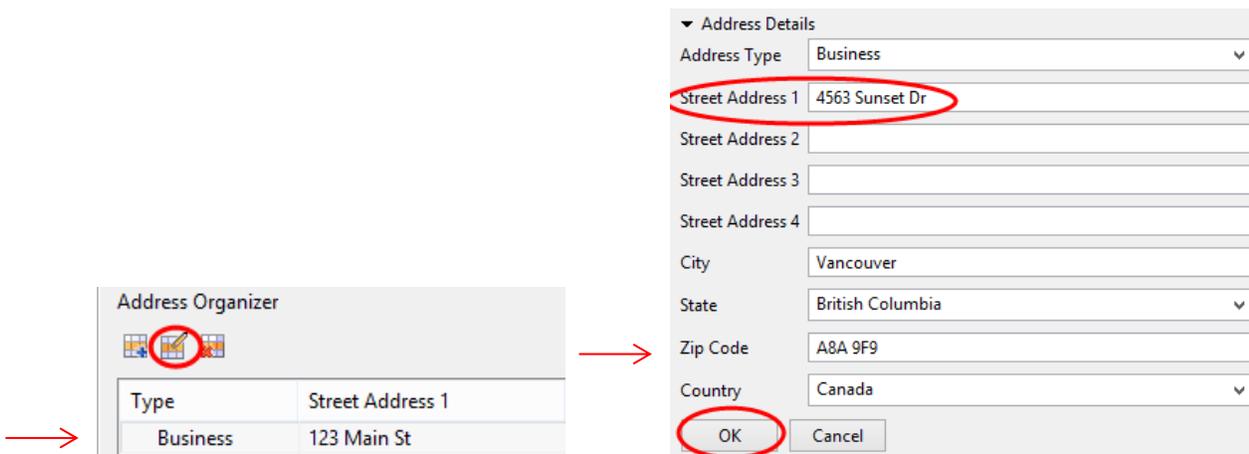
- 1 To modify a Requester, search and select the requester and click the **Modify Requester** button  in the upper-right corner of the Requester view.



- 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**.



Remove an Address

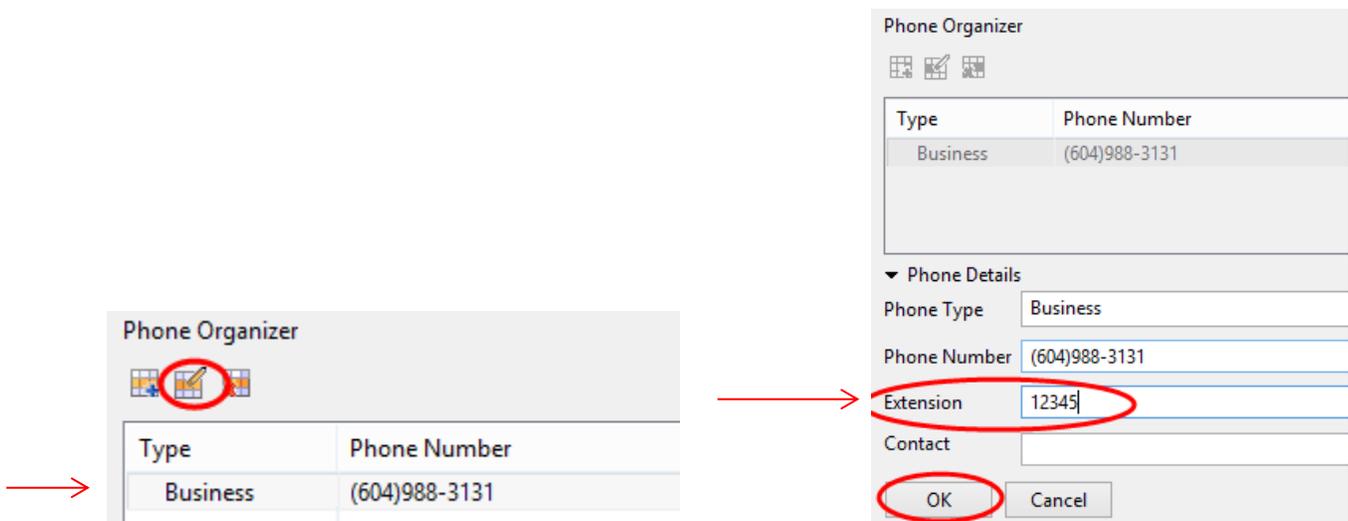
- To remove an address, select the address in Address Organizer table to remove and click the **Remove Address** button.
- The Remove Address dialog box displays. Click **Yes** to remove the address.



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

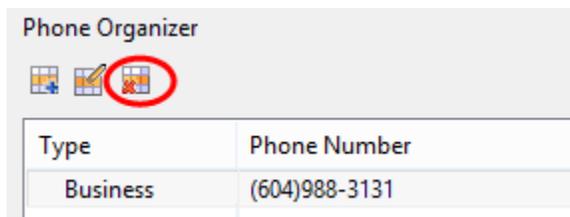
Modify a Phone Number

- 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**.



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.



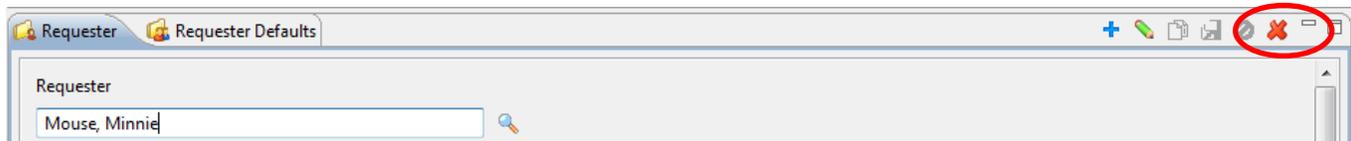


- 3 Click the Save Requester button  in the upper-right corner of the Requester view.

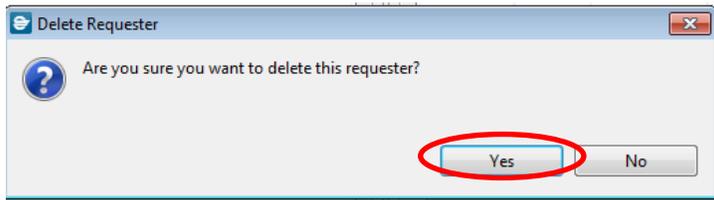


Activity 1.8 Delete a Requester

- 1 To delete a requester, click the **Delete Requester** button  in the upper-right corner of the Requester view.

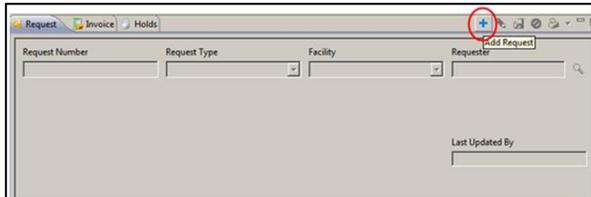


- 2 The Delete Requester dialog box displays. Click **Yes** to delete the requester.

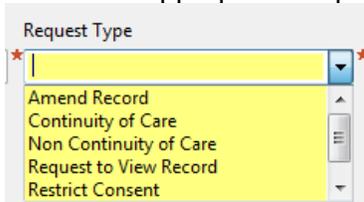


Activity 1.9 – Create a New Request

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



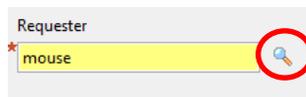
- 2 Select the appropriate request type from the Request Type list.



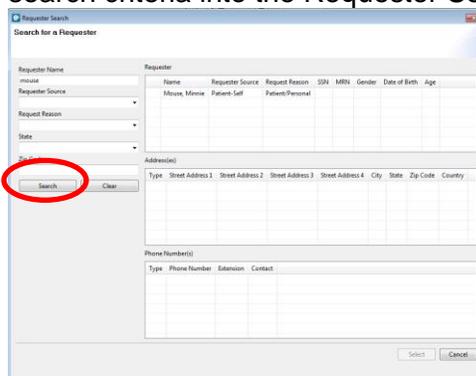
- 3 Select the appropriate Main Facility from the Facility list.



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



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



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

Expanded Requester Search

Search for a Requester

Requester Name: CSTPRODHIM, SALLYDEMO
 Requester Source: Patient-Self
 Request Reason: Patient/Personal
 State: Vancouver
 MRN: 700002849
 SSN: 03-545-1266

Name	Requester Source	Request Reason	SSN	MRN	Gender	Date of Birth	Age
CSTPRODHIM, SALLYDEMO	Patient-Self	Patient/Personal					

Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City	State	Zip
Business	123 Main St				Vancouver	British Columbia	A8

Phone Number(s)

Type	Phone Number	Extension	Contact
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Buttons: Search, Clear, Select, Cancel

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

Request Number: <New Request>
 Request Type: Non Continuity of Care

▼ Patient Information
 Patient Name: CSTPRODHIM, Cherry

Search icon (magnifying glass) is circled in red.

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 Search

Name: Person

MRN	Name	MRN	CMRN	Birth Date	Sex	Age	SSN	Deceased
700002849	CSTPRODHIM, CHERRY	700002849		03-May-1966	Female	51 Years		

Buttons: Search, Clear, Select, Cancel

Fin Nbr	Facility	Encounter Type	Registration Date	Discharge Date	Attending Physician
7000000011252	LGH Lions Gate	Inpatient	02-Oct-2017 12:54	03-Oct-2017 9:54	Plovch, Stuart, MD
7000000004536	LGH Lions Gate	Data Storage	03-May-2017 11:52	03-May-2017 23:59	

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

- 8 The patient and selected encounter or encounters are displayed in the list.

Patient Name: CSTPRODHIM, CHRISTINA		Sex: Female	
Date of Birth: Jan 17, 1994 12:00:00 AM		Privacy Status:	

Patient Name	MRN	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.

→ Paper Documents for CSTPRODHIM, CHRISTINA
 Select: [All](#) [None](#)

Free Text

- 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.

→ Delivery Information
 Delivery Method

Mail
 Fax
 Mail
 On Site Review
 Patient Portal
 Pick-up

Billable Pre-Bill

Street Address 3 Street Address

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.

Print	Bill To	Mail To	Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City	State	Country	Zip Code
<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Business	1234 Sunset Dr				Kansas City	Missouri	United States	65111

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

Accounting of Disclosure

AOD Required

Purpose	Description

Accounting of Disclosure

AOD Required

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

Request Information

Request Reason

Patient/Personal

- Patient/Personal
- Patient Transfer
- Quality/Chart Review
- Research/Clinical Trials
- Secure Records

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

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
- Logged
- Processing

- 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.

Request Information

Request Reason: Quality/Chart Review

Authorization Required:

Request Status: Access Denied/Rejected

Request Date: 1/15/17

Request Time: 17:00

Required Date:

Required Time: 00:00

Days Overdue:

Rejection Reason:

- Chart Unavailable to Provide
- Duplicate Request
- FIPPA Restriction
- Invalid Authorization

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: 1/15/17

Request Time: 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 AccessHIM.

- 19 Click the Save Request button in the upper-right corner of the Request view to save the request.

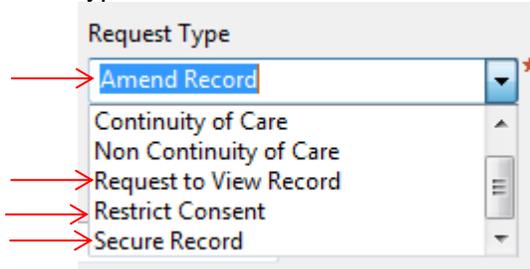
Save Request

- 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.

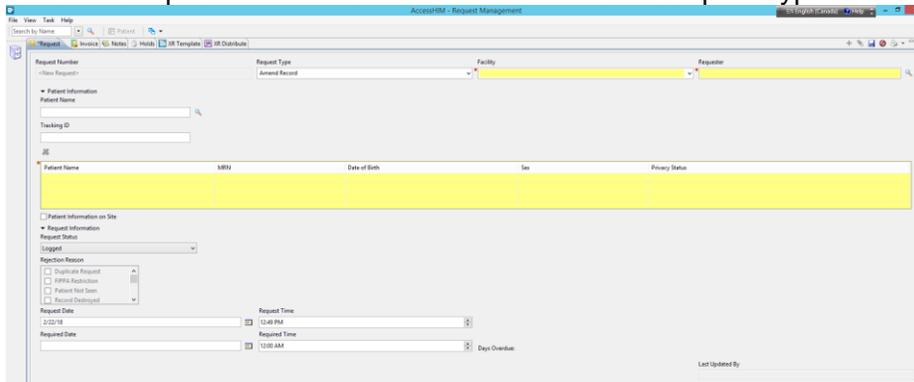
Request Number	Request Type	Facility	Requester
271281424	Non Continuity of Care	LGH Lions Gate Hospital	Mouse, Minnie

NON-ROI REQUEST TYPES:

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



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

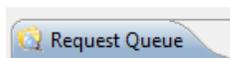


- **Amend Record** - Request to modify information contained in a patient's record. Modifications include adding information, deleting information, or correcting erroneous information.
- **Request to View Record** - Request to view a patient's record.
- **Restrict Consent** - Request made by a person 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.
 - To create a new request, open the Request view.
 - Select the Add Request button in the upper-right corner of the Request view.
 - Select the request type from the Request Type list.
 - 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

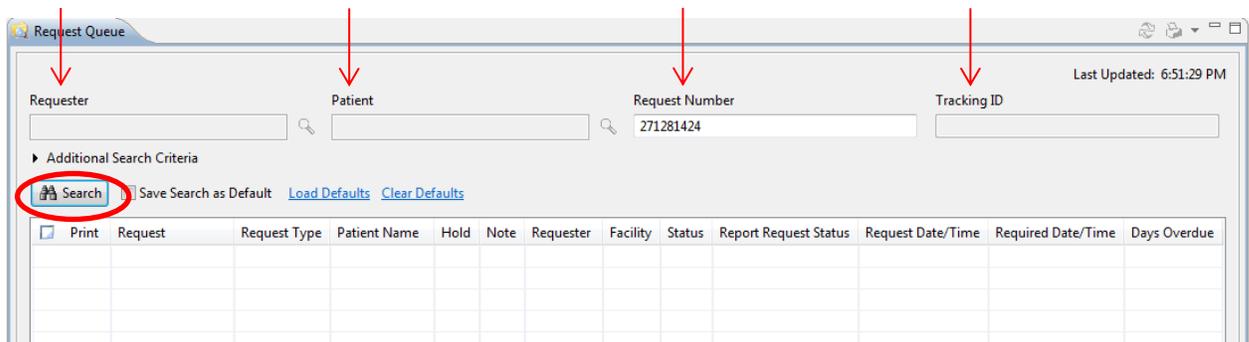
- 1 To search for a request previously entered, open the Request Queue view.



- 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  .



- 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).

- 4 Search for the request or requests based on selected criteria. The Request Queue view populates with all requests matching the criteria.

Request	Patient	Request Number	Tracking ID
271253987		271253987	

Print	Request	Request Type	Patient Name	Hold	Note	Requester	Facility	Status	Report Request Status	Request Date/Time	Required Date/Time	Days Overdue
<input type="checkbox"/>	271253987	Non Continuity of Care	CSTPRODHM HIMTES...			BCRH5, Test,	LGH Medical Imaging	Logged		07-Jun-2017 10:53	19-Jul-2017 10:53	218

Activity 1.11 – Retrieve, View and Modify a Request

- 1 To retrieve and view or modify a request previously entered, search for the request in the Request Queue.
- 2 Select the request to view or modify from the list of requests displayed

Print	Request	Request Type	Patient Name	Hold	Note	Requester	Facility	Status	Report Request Status	Request Date/Time	Required Date/Time
<input type="checkbox"/>	271281424	Non Contin...	Multiple			Mouse, ...	LGH ...	Log...		15-Jan-2017 17:00	26-Feb-2017 17

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

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

Patient Information
Patient Name: [Empty]
Tracking ID: [Empty]

Patient Name: CSTPRODHIM, CHERRY
Sex: Female
Date of Birth: May 3, 1966 12:00:00 AM
Privacy Status: Not on File

Patient Name	MRN	Admit Date	Discharge Date	FIN	Encounter Type	Attending Physician
CSTPRODHIM, CH						
CSTPRODHIM, SA						

Paper Documents for CSTPRODHIM, CHERRY

Delivery Information
Delivery Method: Mail
Billable: Pre-Bill:

Address Information

Print	Bill To	Mail To	Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City	State	Country	Zip Co
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mail...	231 15th St E	110-4900 Oak ...			North Va...	Britis...	Canada	V7L 2L
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Billing	Attention: Mi...				Vancouver	Britis...	Canada	V6H3H

Accounting of Disclosure
AOD Required:

Purpose: [Empty]
Description: [Empty]

Request Information
Request Reason: Quality/Chart Review
Authorization Required:
Request Status: Logged
Request Date: [Empty]
Request Time: [Empty]

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



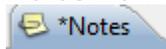
- Make necessary changes.

- 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.



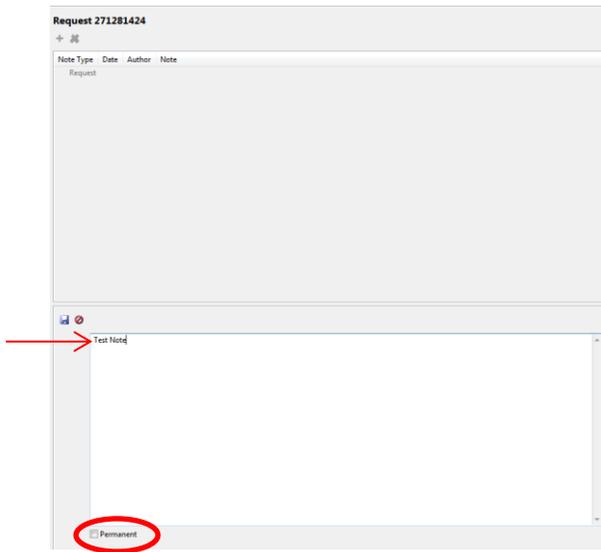
- Click the Add Note button to add a note.

Request 271281424

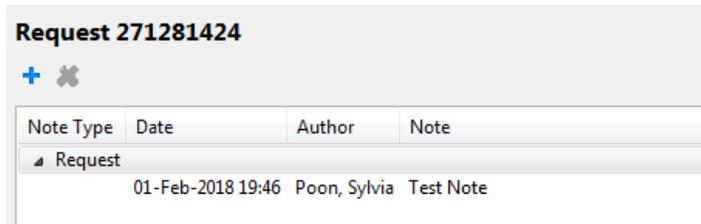
Note Type	Date	Author	Note
Request			

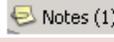
- Enter a note in the lower window. Check the Permanent option if the note should be saved as a permanent note. When deleting a permanent the note, a warning will prompt the user prior to

deletion.

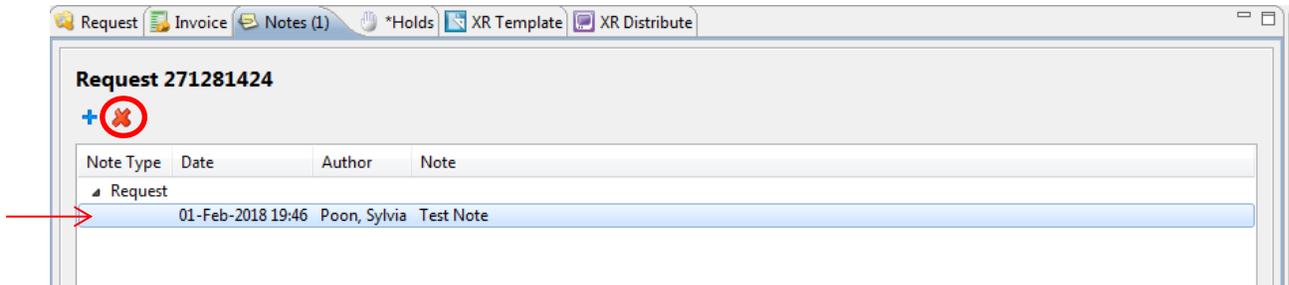


- 4 Click the Save Note button . The note is displayed in the Notes view.

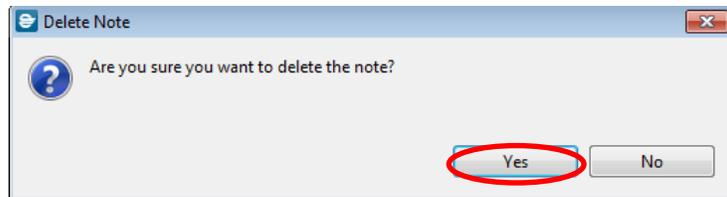


Note: The note is denoted by a paperclip  icon in the Note column of the request in the Request Queue view. The number of notes is displayed in the notes view heading .

- 5 To delete a note, select the note and click the **Delete Note** button .

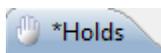


- 6 The Delete Note dialog box displays. Click **Yes** to delete the note. The note is deleted.

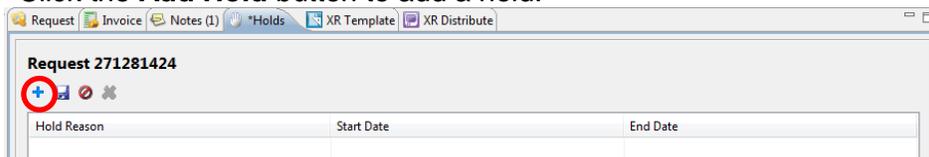


Activity 1.13 – Add, View and Delete a Hold

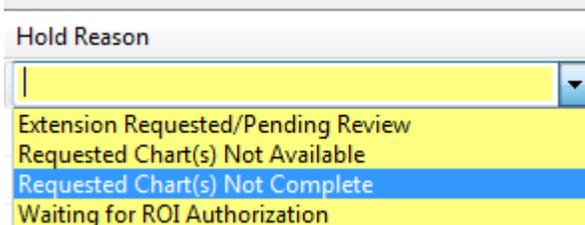
- 1 To add a hold to a request, search and select the request in Request Queue and open the Holds view.



- 2 Click the **Add Hold** button to add a hold.



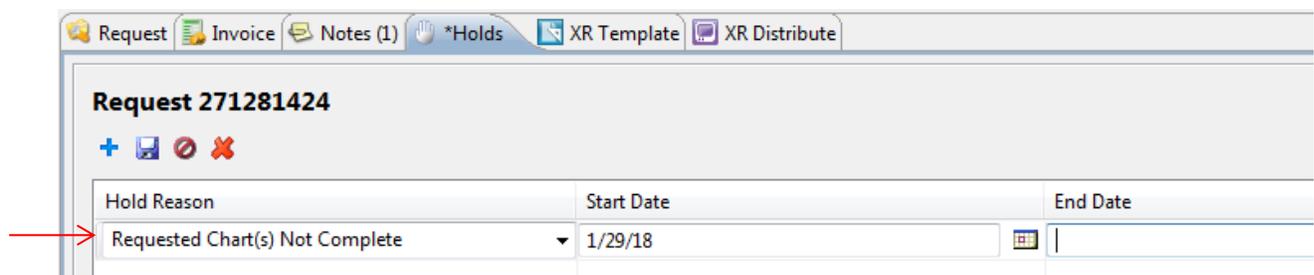
- 3 Select a hold reason from the Hold Reason list.



- 4 Enter or select a Start Date. To enter the current date, press 'T'.

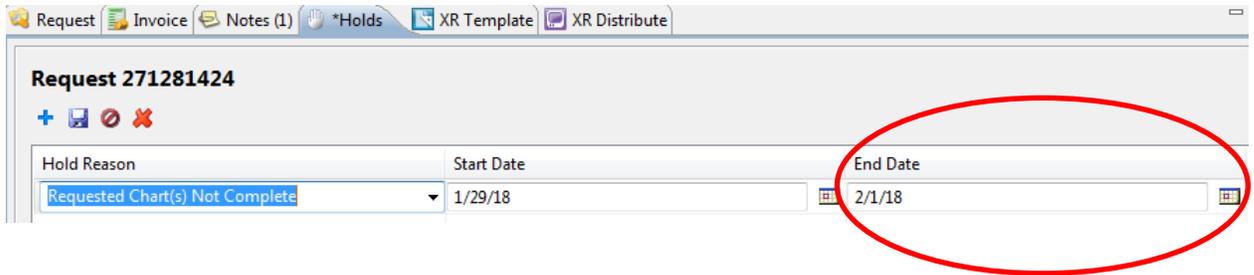


- 5 Click the Save Hold button . The hold is displayed in the Hold view.

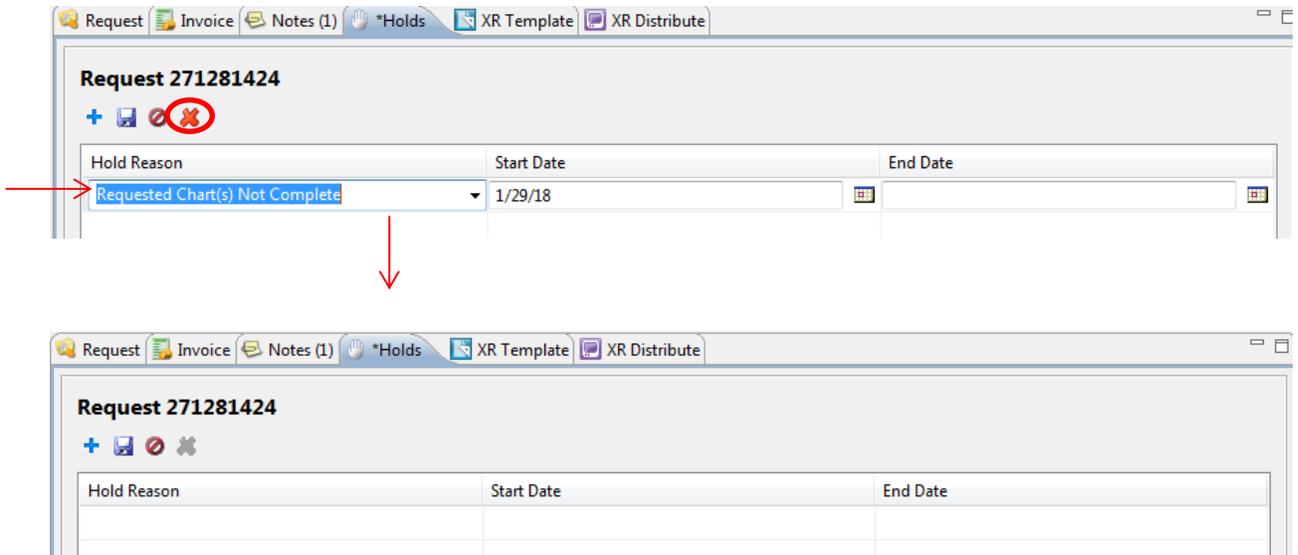


Note: The hold is denoted by a hand  icon in the Hold column of the request in the Request Queue view.

- 6 To end a hold, select the hold and enter or select an End Date. To enter the current date, press 'T'.

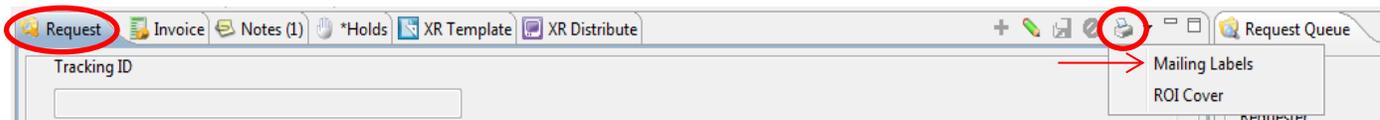


- 7 To delete a hold, select the hold and click the Delete Hold button . The hold is deleted.

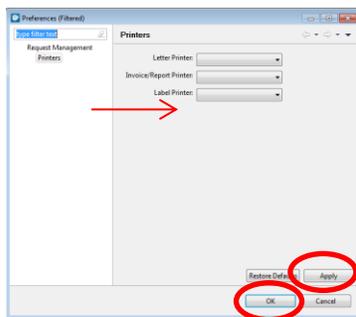


Activity 1.14 – Print a Mailing Label

- 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.

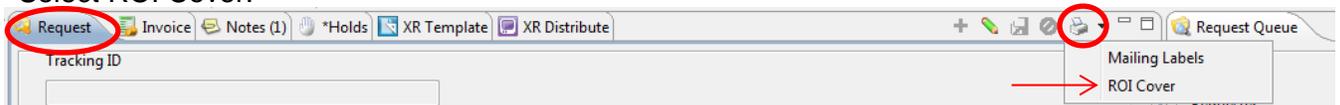


- 3 If you have set your printer defaults, the label should print to your selected Label Printer. If there is no printer defaults, you will get the Preference (Filtered) dialogue box. Select the Label Printer and select **Apply** and **OK**.

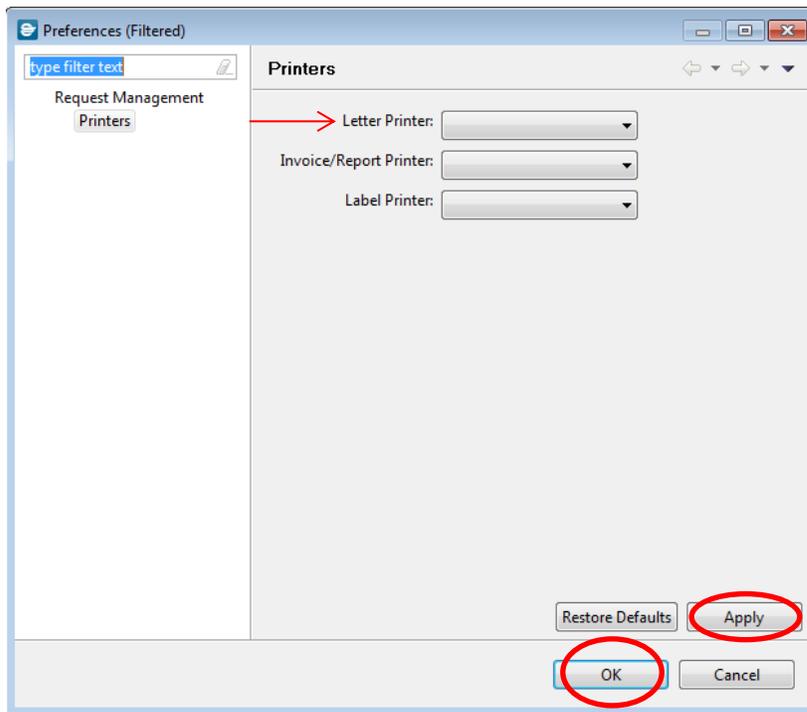


Activity 1.15 – Print a Cover Letter

- 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.



- 3 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**.



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



- 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.

Request 271555798

Invoice Details

Total Number of Pages Distributed: 0

Charges per Page	Rate	Calculated Charges
Paper Pages Distributed	0	
Microfilm Pages Distributed	0	
Electronic Pages Distributed	0	

Additional Charges

Mileage	<input type="text"/> miles @ \$0.00 / mile
Other	@ \$0.00
Postage	@ \$0.00
Retrieval	@ \$0.00
Sales Tax	@ \$0.00
Telephone	@ \$0.00
Witness Fees	@ \$0.00

Total Charges

Calculated Total	Adjusted Total
0.00	0.00

Adjust Calculated Total

▶ Comments
▶ Payment Information

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

Complete Request Option

The balance for this invoice is now zero. Do you want to update the request status to complete?

Yes No

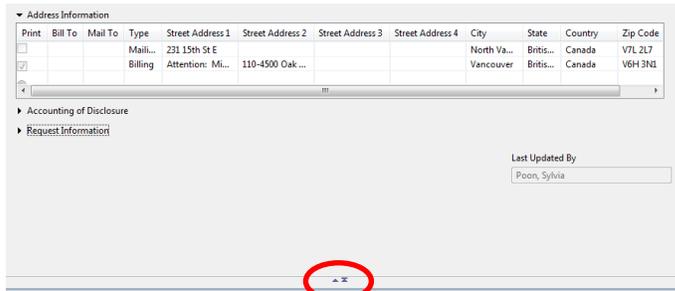
4 Click on the print icon and choose applicable Invoice/Prepayment letter.

Request Q

- Invoice
- Invoice Cover
- Pre-Payment

Activity 1.16 – View Request History

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



Address Information

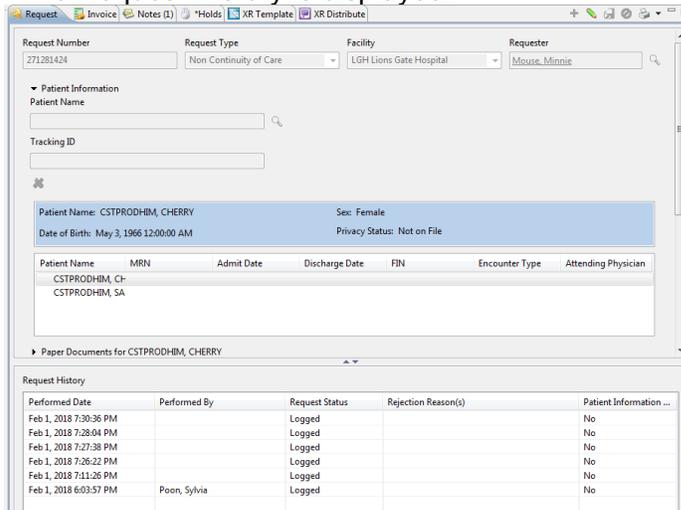
Print	Bill To	Mail To	Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City	State	Country	Zip Code
			Billing	231 15th St E	Attention: Mi...	110-4500 Oak ...		North Va... Vancouver	Britis... Britis...	Canada Canada	V7L 2L7 V6H 3N1

Accounting of Disclosure

Request Information

Last Updated By
Poon, Sylvia

- 2 The Request History is displayed.



Request Number: 271281424

Request Type: Non Continuity of Care

Facility: LGH Lions Gate Hospital

Requester: Mouse, Minnie

Patient Information

Patient Name: CSTPRODHIM, CHERRY

Sex: Female

Date of Birth: May 3, 1966 12:00:00 AM

Privacy Status: Not on File

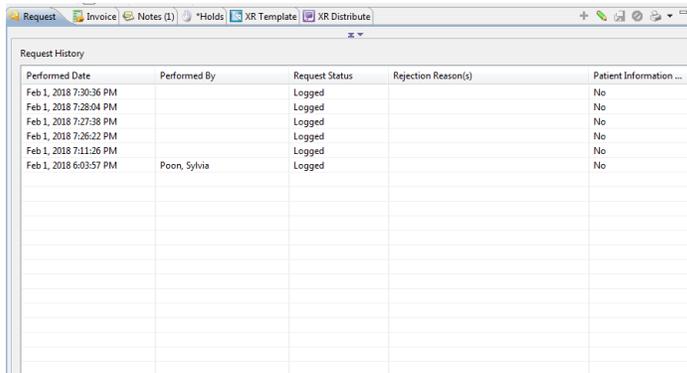
Patient Name	MRN	Admit Date	Discharge Date	FIN	Encounter Type	Attending Physician
CSTPRODHIM, CH						
CSTPRODHIM, SA						

Paper Documents for CSTPRODHIM, CHERRY

Request History

Performed Date	Performed By	Request Status	Rejection Reason(s)	Patient Information ...
Feb 1, 2018 7:30:36 PM		Logged		No
Feb 1, 2018 7:28:04 PM		Logged		No
Feb 1, 2018 7:27:38 PM		Logged		No
Feb 1, 2018 7:26:22 PM		Logged		No
Feb 1, 2018 7:11:26 PM		Logged		No
Feb 1, 2018 6:03:57 PM	Poon, Sylvia	Logged		No

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



Request History

Performed Date	Performed By	Request Status	Rejection Reason(s)	Patient Information ...
Feb 1, 2018 7:30:36 PM		Logged		No
Feb 1, 2018 7:28:04 PM		Logged		No
Feb 1, 2018 7:27:38 PM		Logged		No
Feb 1, 2018 7:26:22 PM		Logged		No
Feb 1, 2018 7:11:26 PM		Logged		No
Feb 1, 2018 6:03:57 PM	Poon, Sylvia	Logged		No

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

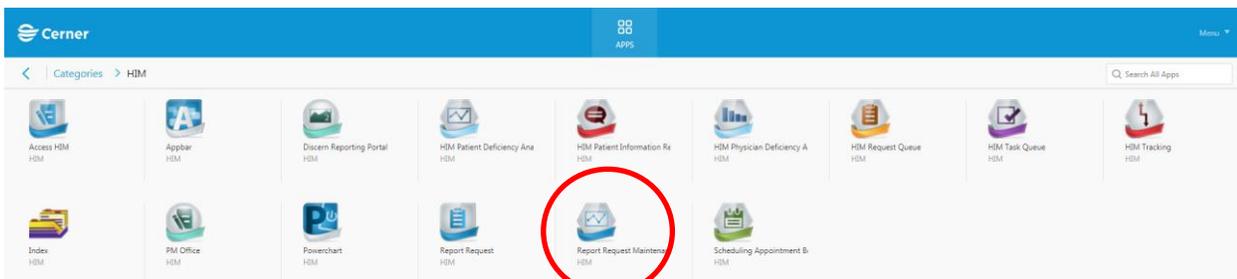
The Report Request application is used to generate ad hoc or on demand patient charts using Clinical Reporting XR. The application is typically used to print the entire health record, or portions of a health record, for Release of Information (ROI) requests.

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

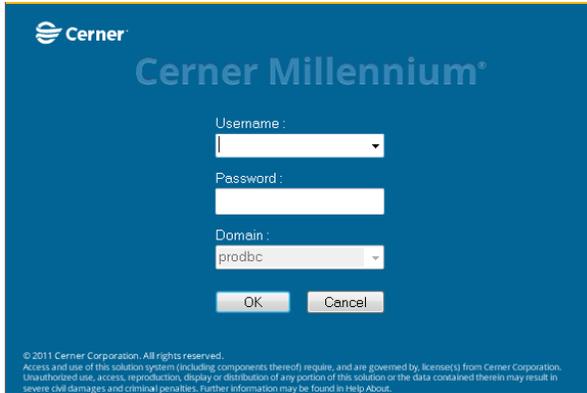
1

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

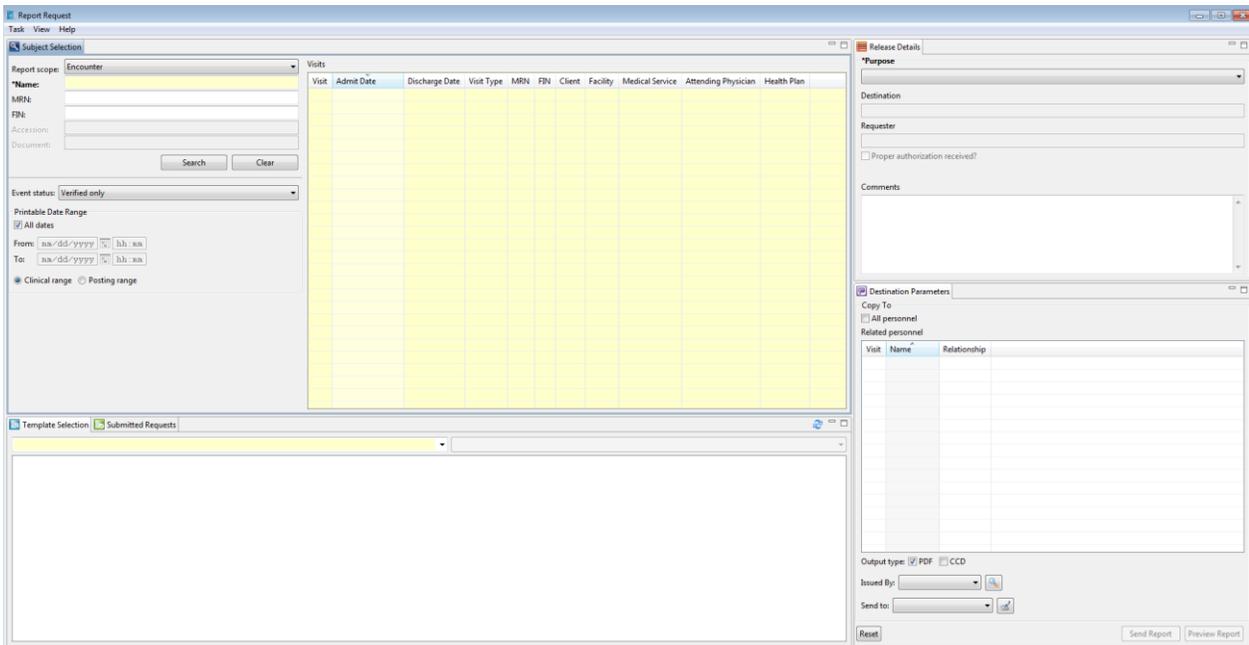


2

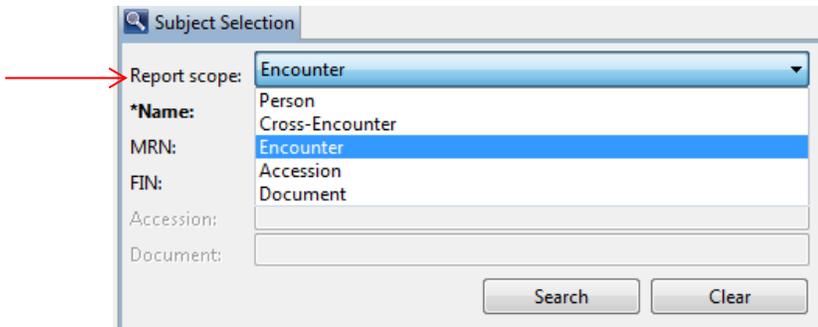
You will be prompted to login, enter Username, Password and click **OK**.



3 The Report Request window will appear.



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

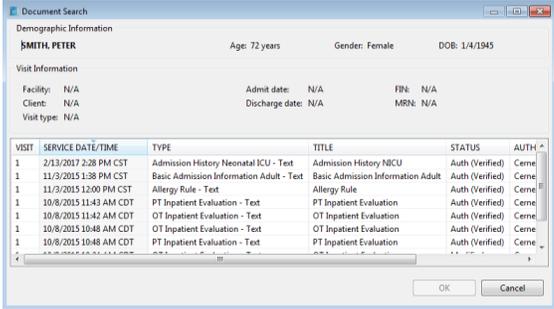




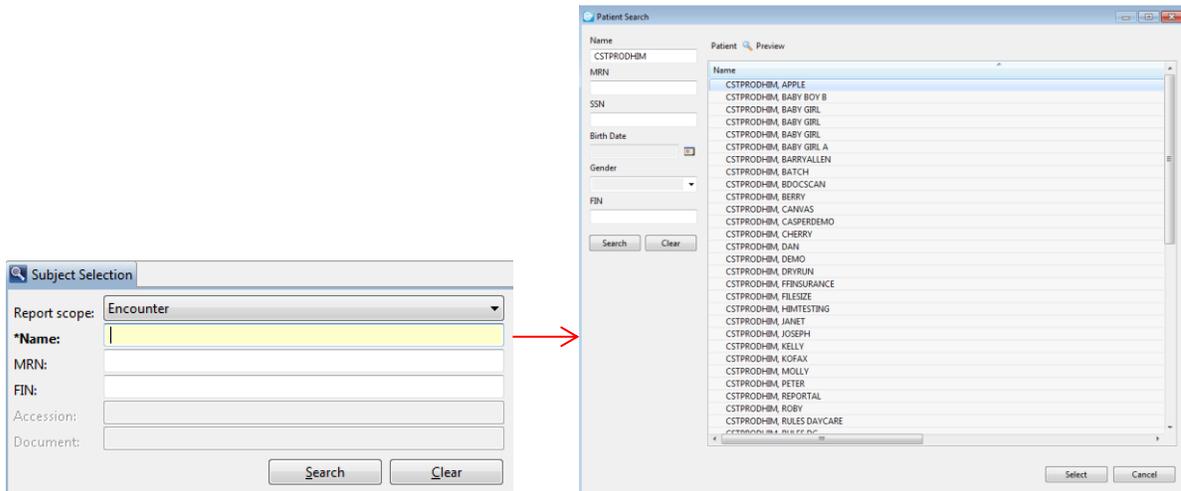
NOTE 1: HIM ROI staff will use the **Encounter Report Scope** the majority of the time. **Person** and **Cross-Encounter Reports** Scopes are **not** recommended for use.

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

Report Scope	Description
<p style="text-align: center;">Encounter</p>	<ul style="list-style-type: none"> • 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. • This scope is used by audiences who require comprehensive records of a patient's stay. • Can be run multiple times to print a separate packet for each encounter. • 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.
<p style="text-align: center;">Accession</p>	<ul style="list-style-type: none"> • Produces a report that contains the results for a single accession number. • 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. • Accession level printing will be used by Medical Imaging in Radorderviewer. • 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. <p>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.</p>

<p>Document</p>	<ul style="list-style-type: none"> • Produces a report that contains the selected document or documents. • 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.  <ul style="list-style-type: none"> • Use if single documents are needed. • Use if all of a specific document type is needed across multiple encounters. Example: Patient is requesting each Transplant Record from every encounter. The ROI Clerk would select all Transplant Documentation sections in the Document Search window.
<p>Person</p>	<p>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.</p>
<p>Cross-Encounter</p>	<p>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.</p>

5 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.



- 6 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	7000000016049	LGH Lions Gate Hospital	LGH Lions C
2	12/8/2017	12/8/2017	Pre-Outpatient	700000379	7000000015799	LGH Joint Replacement Access Clinic JRAC	LGH JRAC
3	12/5/2017	12/5/2017	Emergency	700000379	7000000016061	LGH Lions Gate Hospital	LGH Lions C
4	12/5/2017	12/5/2017	Inpatient	700000379	7000000016057	LGH Lions Gate Hospital	LGH Lions C
5	12/5/2017	12/5/2017	Recurring	700000379	7000000016054	LGH Lions Gate Hospital	LGH Lions C
6	12/5/2017	12/5/2017	Minor Surgery	700000379	7000000016051	LGH Lions Gate Hospital	LGH Lions C
7	12/4/2017	12/4/2017	Pre-Outpatient OB	700000379	7000000010827	LGH Lions Gate Hospital	LGH Lions C
8	11/30/2017	12/8/2017	Day Surgery	700000379	7000000015791	LGH Lions Gate Hospital	LGH Lions C
9	11/23/2017	11/23/2017	Outside Images	700000379	7000000015419	PEM Medical Imaging	PEM Med Ir
10	11/23/2017	11/23/2017	Specimen	700000379	7000000015418	PEM Laboratory	PEM Labora
11	7/11/2017	7/11/2017	Inpatient	700000379	7000000007384	SGH Squamish General Hospital	SGH Squam
12	3/14/2017	3/14/2017	Data Storage	700000379	7000000003615	LGH Lions Gate Hospital	LGH Lions C
13	1/10/2017	5/10/2017	Inpatient	700000379	7000000002546	LGH Lions Gate Hospital	LGH Lions C
14	12/5/2016	5/21/2017	Recurring	700000379	7000000002193	LGH Pulmonary Function Lab	LGH PF Lab
15	12/5/2016	12/5/2016	Recurring	700000379	7000000002184	LGH Pulmonary Function Lab	LGH PF Lab
16	11/2/2016	11/2/2016	Outpatient	700000379	7000000001444	LGH Pulmonary Function Lab	LGH PF Lab
17	11/2/2016	11/2/2016	Inpatient	700000379	7000000001429	SGH Squamish General Hospital	SGH Squam
18	9/22/2016	11/14/2016	Inpatient	700000379	7000000000465	LGH Lions Gate Hospital	LGH Lions C
19		5/21/2017	Pre-Outpatient	700000379	7000000001749	LGH Pulmonary Function Lab	LGH PF Lab
20		5/21/2017	Pre-Recurring	700000379	7000000003169	LGH Chemotherapy Clinic	LGH Chemc
21		8/31/2017	Pre-Outpatient	700000379	7000000007566	LGH Cast Clinic	LGH Cast Cl
22		8/31/2017	Pre-Outpatient	700000379	7000000007452	SGH Squamish General Hospital	SGH Squam
23		5/21/2017	Pre-Recurring	700000379	7000000002228	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.

- 7 Select the **Event Status** and **Printable Date Range**.

- Event Status:

- *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 in-error and cancelled. This may or may not be available based on the user’s position and their security settings.

Event status: **Verified only**

Printable Date Range: **Verified only**

All dates **All results**

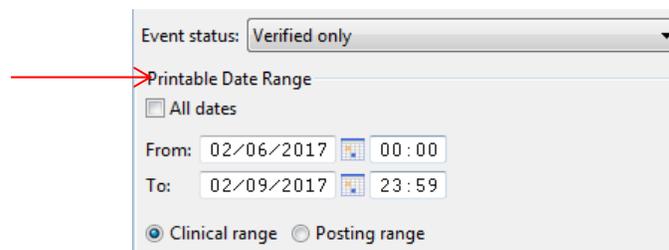
From:

To:

Clinical range Posting range

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.

- **Printable Date Range:** This allows the user to specify if all or part of the patient chart is needed.
 - 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.

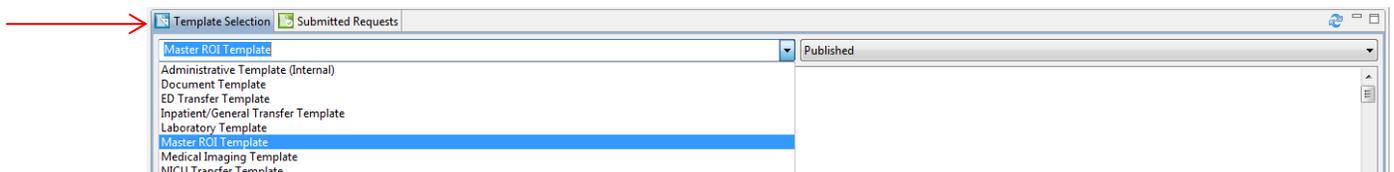


- **Ranges:**
 - *Clinical Range:* Will include all clinically relevant information on the patients encounter.
 - *Posting Range:* Will only include information that was posted during the patient stay (admit to discharge).

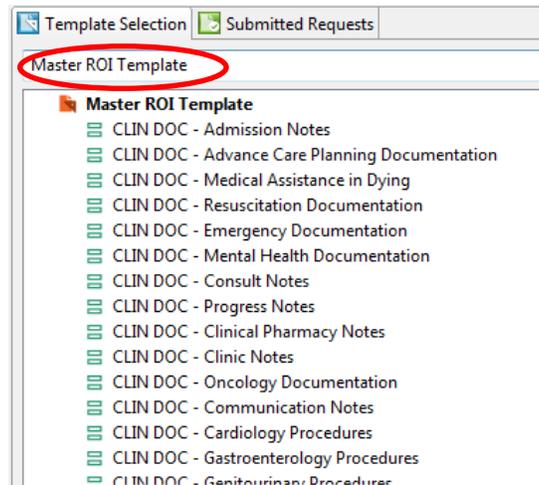
8 Select the **Template.**

- **Template Selection:**

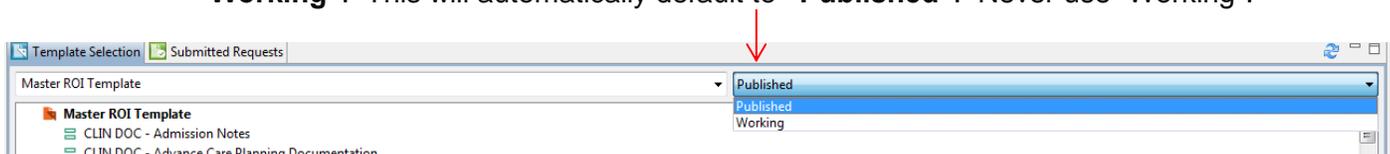
Choose the appropriate template from the drop down based on the needed information. The list of available templates may vary between positions if the Template Security functionality is utilized. When the template is selected, the sections on the template will display below. When no sections are selected, 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.



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



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	Description
Documents Template	<ul style="list-style-type: none"> This includes all Clinical Documents, Nursing PowerForms and Medical Imaging results. Use this template when: <ul style="list-style-type: none"> ➤ A patient needs all of the clinical documents from their visit. ➤ A patient needs one specific document from their visit.
ED Transfer Template	<ul style="list-style-type: none"> Condensed version of the chart with <i>ED specific information</i> and any <i>Lab or Medical Imaging results</i>. Used typically by clinical positions in ED transfer scenarios to a facility without CST Cerner access.
Inpatient/General Transfer Template	<ul style="list-style-type: none"> Condensed version of the chart with <i>Transfer specific documentation</i> and any <i>Lab or Medical Imaging results</i>. Used typically by clinical positions in transfer scenarios to a facility without CST Cerner access.
Laboratory Template	<ul style="list-style-type: none"> All <i>Lab results</i> for a patient’s encounter. Used when a patient is requesting some or all lab results

	from an encounter.
Master ROI Template	<ul style="list-style-type: none"> • <i>EVERYTHING</i> from a patient’s encounter. <ul style="list-style-type: none"> ➢ <i>Excluded: Interdisciplinary Signature Sheet and Personnel Name History</i> • Use when: <ul style="list-style-type: none"> ➢ A patient, lawyer, patient representative, etc. is requesting a patient’s full, legal medical record. ➢ Can be printed multiple times at the encounter level for all encounters.
Medical Imaging Template	<ul style="list-style-type: none"> • <i>All Medical Imaging results</i> from a patient’s encounter. • Used when a patient is requesting some or all Medical Imaging results from an encounter. • **Note: If a patient is requesting images, 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.
NICU Transfer Template	<ul style="list-style-type: none"> • Condensed version of the chart with <i>NICU and Newborn Transfer specific documentation and any Lab or Medical Imaging results.</i> • Used typically by clinical positions in transfer scenarios to a facility without CST Cerner access.
Administrative Template	<ul style="list-style-type: none"> • <i>This includes the following documents: ROI correspondence, Personal Effects and Valuables, I Have Been Scanned, Interdisciplinary Signature Sheet and Personnel Name History.</i> • <i>Used when the specific information is required to be released.</i>

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).

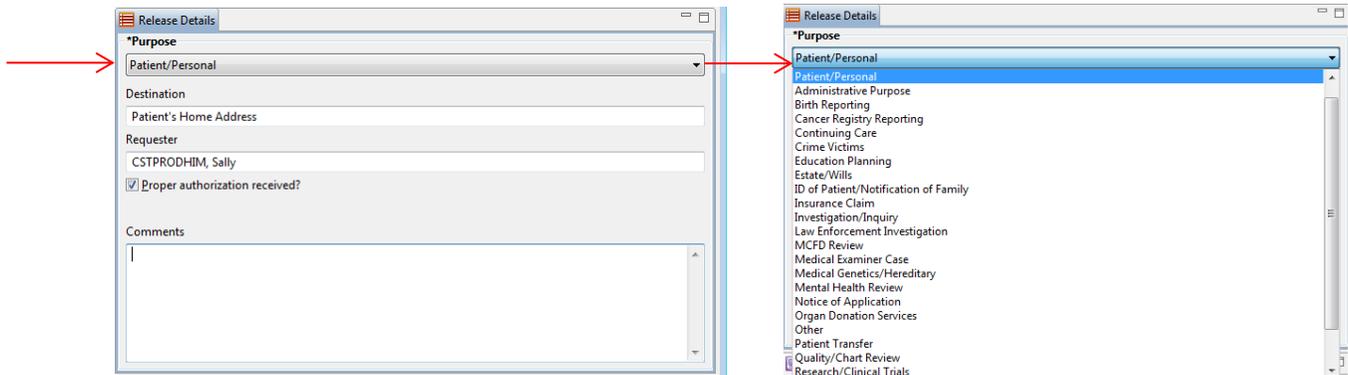
Request Status	Person Name	Requested Date/Time	Report Request Id	Output Device	Pages	Receiving Personnel
✓ Previewed	SMITH, MORGAN	2/20/2017 2:05 PM CST	3746286	N/A	3	Model, User 123 Cerner
✗ Error Sending to DMS	SMITH, MORGAN	2/20/2017 2:05 PM CST	3746285	XRCHARTNULL	3	Model, User 123 Cerner

10 Complete the Release Details tab.

Purpose: 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.



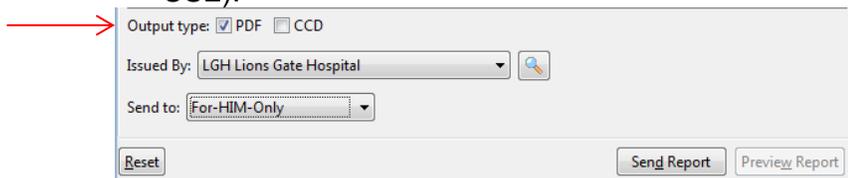
11 Destination Parameters tab.

Related Personnel: 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.**

Visit	Name	Relationship
1	Cerner Test, Physician - Ambulatory Five Cerner	Admitting Physician
1	Cerner Test, Physician - Ambulatory Five Cerner	Attending Physician
1	Giebler, Bridget	Database Coordinator
	Pratt, MD, Alyssa Cerner	Primary Care Physician

12 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).



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: PDF CCD

Issued By: LGH Lions Gate Hospital

Send to: For-HIM-Only

Buttons: Reset, Send Report, Preview 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: PDF CCD

Issued By: LGH Lions Gate Hospital

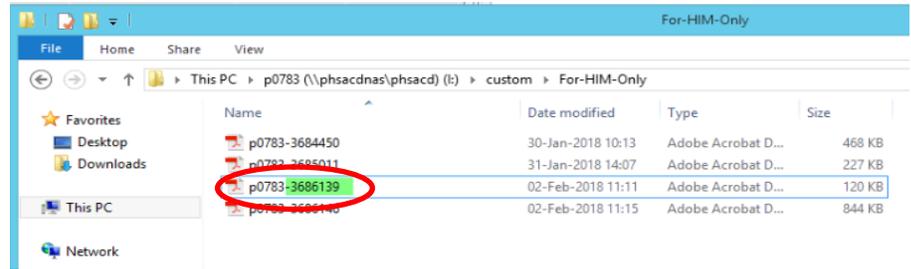
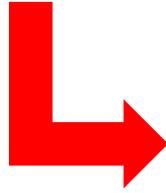
Send to: For-HIM-Only

Buttons: Reset, Send Report, Preview Report

There are 3 options that we will use:

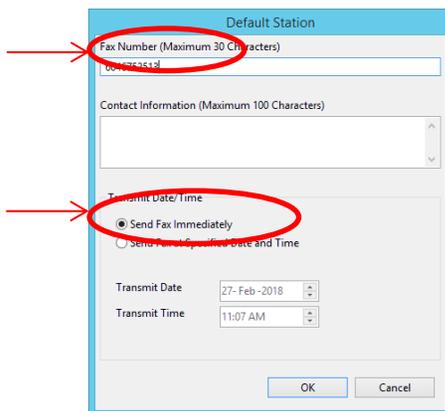
- To **print** on a printer, select the appropriate network printer from the drop down menu.
 - **sg_h_healthrec_I1 / sg_h_healthrec_I2**
 - **lgh_him_I1 / lgh_him_I2 / lgh_him_I3 / lgh_him_I4 / lgh_him_I5**
- To **save to a shared network folder**, select “**For-HIM-Only**”.
 - This option is for when 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 [I:\custom\For-HIM-Only](#)
 - 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.

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



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**.

A screenshot of a web form interface. At the top, it says "Output type: PDF CCD". Below that is a dropdown menu for "Issued By:" with "LGH Lions Gate Hospital" selected and a search icon. Underneath is another dropdown menu for "Send to:" with "_ManualFax" selected and a search icon. At the bottom left is a "Reset" button. At the bottom right are two buttons: "Send Report" and "Preview Report". The "Preview Report" button is circled in red.

- 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.

CSTPRODHIM, SALLY (7000000001429)

SGH Squamish General Hospital 38140 Behmer Drive
Squamish, British Columbia V8B 0

Patient Information
 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: 66 Years
 VANCOUVER, British Columbia V3M4J5
 Billing Phone: (604)987-8543

Contact Information
Emergency Contact Contact Name: DWIGHT WATSON
 Relationship: Spouse Home Phone: (604)898-5555
Additional Contact Contact Name: REBECCA
 Relationship: zzzDaught Home Phone: (604)888-55

Primary Insurance
 Subscriber Name: CSTPRODHIM, SALLY Health Plan Name: BC Res
 Relationship: Self Claim Address: SEE CA
 Gender: Female Insurance Phone: (604)451
 DOB: 09/20/1951 Policy Number: 98783937
 Age: 66 Years
 Health Plan/Financial Class: MSP

Secondary Insurance
 Subscriber Name: Health Plan Name:
 Relationship: Claim Address:
 Gender: Insurance Phone:
 DOB: Policy Number:
 Age: Health Plan/Financial Class:

Encounter Information
 Reg Dt/Tm: 11/02/2018 08:49 Enc Type: Inpatient Advance C
 Artn Dt/Tm: 11/02/2018 10:13 Medical Service: zzzInternal Medicine Disease & I

8.50 x 11.00 in

Note: It is very important to NOT print or save the chart from Adobe. There is no way to track 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.

- 16 After previewing the entire report, click on the close button at the top right-hand corner.
- 17 Click on **Send Report**

Output type: PDF CCD

Issued By: LGH Lions Gate Hospital

Send to: For-HIM-Only

Reset Send Report Preview Report

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.

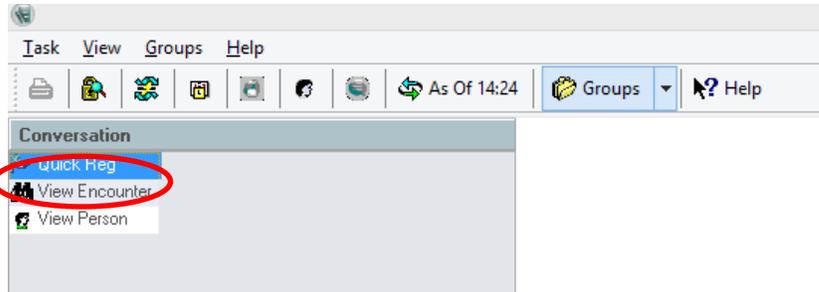
1

From the Citrix StoreFront, click on the PM Office icon



2

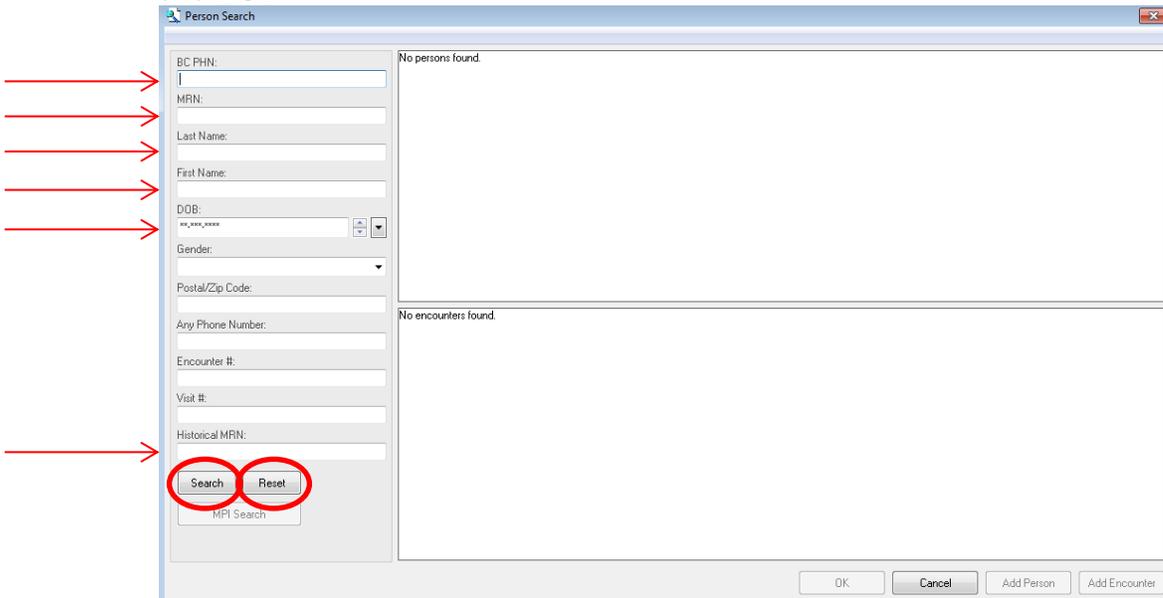
From the **Conversation Menu**, double-click **Quick Reg**.



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

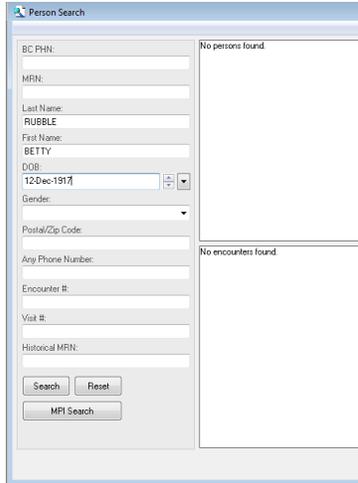
If the patient cannot be found by PHN, click **Reset** and search by **MRN/Historical MRN and Name**.

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

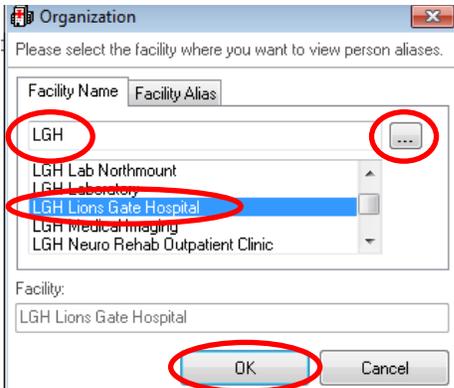


*Note: If this search returns any data, and none of them are the patient you are looking for, click on **Reset** before continuing. Always click **Reset** between searches if you find patient records.*

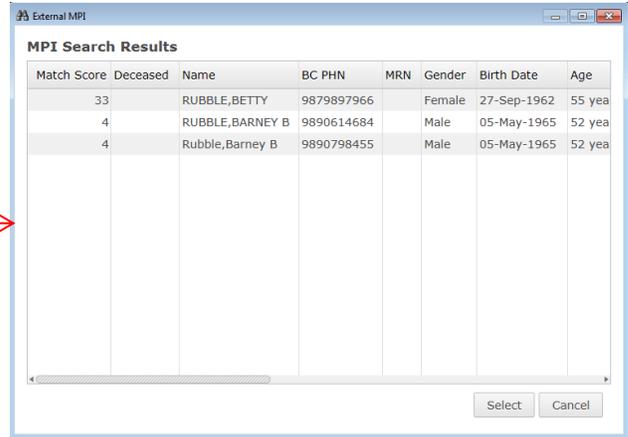
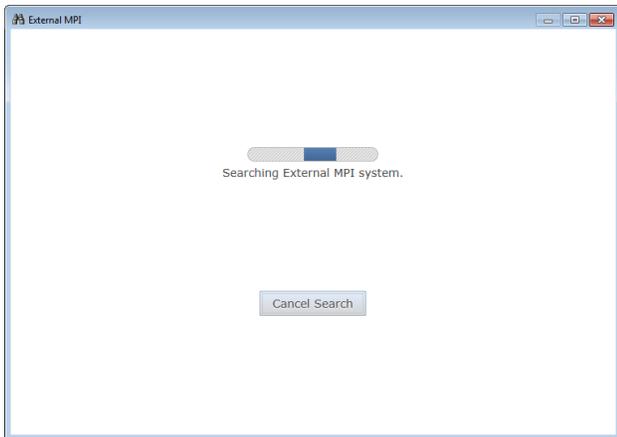
- 4 Once you have determined that this patient has not previously been to a CST Cerner site as no search results are returned, click on the **MPI Search** button. This will search the Ministry's Registry through the Enterprise Master Patient Index (EMPI).



- 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**.



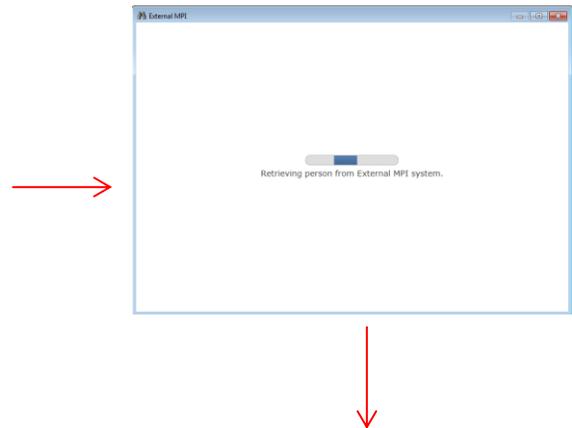
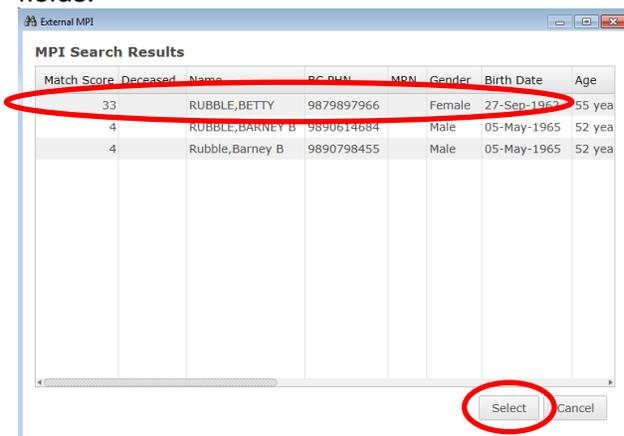
- 6 The External MPI search window will appear momentarily. If the EMPI finds any similar matches, they will appear. Ensure you take the time to CAREFULLY review the patients displayed in the window.



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

Medical Record Number: 7000000000 Encounter Number: Last Name: RUELLE First Name: BETTY Middle Name: Preferred Name: Previous Last Name: Date of Birth: 27-Sep-1962 Age: 55Y Gender: Female IC PIN: 9879837966

ALERTS | Patient Information | Encounter Information | Insurance | Insurance Summary

Encounter Type: Medical Service: Reason for Visit:

Location: Facility: LGH Lions Gate Building: LGH Lions Gate Unit/Clinic: Room: Bed:

Care Providers: Attending Provider: Referring Provider: Primary Care Provider (PCP): PCP Verified?:

Comment: Comment:

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 Type: Data Storage

Medical Service: HIM Documentation

Reason for Visit:

Location: Facility: LGH Lions Gate Building: LGH Lions Gate Unit/Clinic: Room: Bed:

Care Providers: Attending Provider: Referring Provider: Primary Care Provider (PCP): PCP Verified?:

Quick Reg

Medical Record Number: 7000000000 Encounter Number: Last Name: RUELLE First Name: BETTY Middle Name: Preferred Name: Previous Last Name: Date of Birth: 27-Sep-1962 Age: 55Y Gender: Female IC PIN: 9879837966

ALERTS | Patient Information | Encounter Information | Insurance | Insurance Summary

Encounter Type: Data Storage Medical Service: HIM Documentation Reason for Visit:

Location: Facility: LGH Lions Gate Building: LGH Lions Gate Unit/Clinic: Room: Bed:

Care Providers: Attending Provider: Referring Provider: Primary Care Provider (PCP): PCP Verified?:

Comment: Comment:

Account Data: Registration Date: 13-Dec-2017 Registration Time: 12:36 Quick Reg User Name: Poon, Sylvia

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.

Account Data

Registration Date: 13-Dec-2017 Registration Time: 12:36 Quick Reg User Name: Poon, Sylvia

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



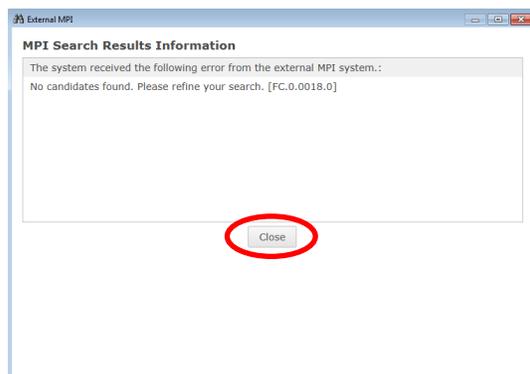
Correct Patient is NOT Found

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

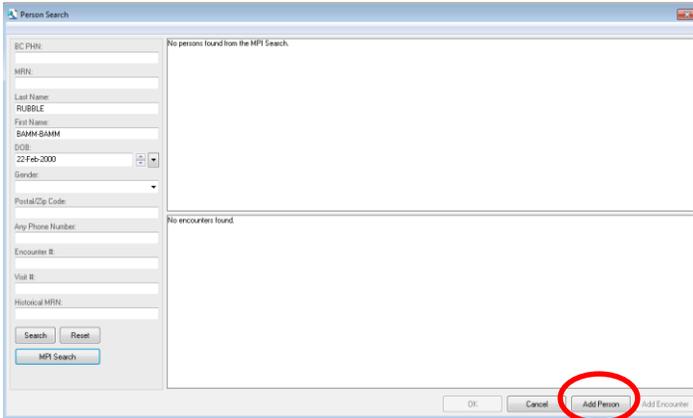
- Last Name
- First Name
- DOB
- Gender
- Full Address

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.

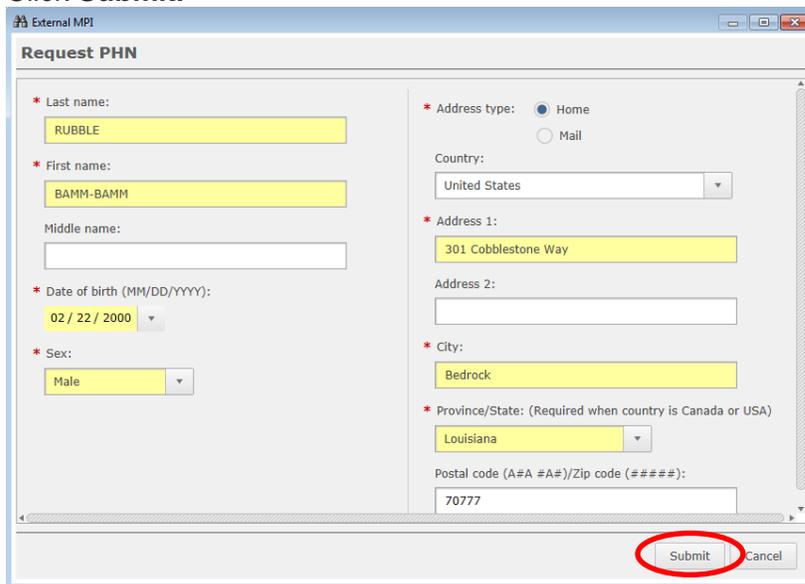


- 2 From the Cerner Person Search screen, click **Add Person**.



- 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.

Click **Submit**.



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

Quick Reg

The PHN Request was successful.

Medical Record Number: 70000951 | Encounter Number: | Last Name: RUBBLE | First Name: BMM-BMM | Middle Name: | Preferred Name: | Previous Last Name: | Date of Birth: 22 Feb-2000 | Age: 17Y | Gender: Male | BC PHN: 9876405325

ALERTS | Patient Information | Encounter Information | Insurance | Insurance Summary

Encounter Type: | Medical Service: | Reason for Visit: |

Location: |

Facility: LGH Lions Gate | Building: | Unit/Clinic: | Bed Availability: | Room: | Bed: |

Care Providers: |

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: Poon, Sylvia

- 5 Select the **Encounter Information** tab:
- For the **Encounter Type**, select **Data Storage**.
 - For **Medical Service**, select **HIM Documentation**

Encounter Information

Encounter Type: Data Storage

Medical Service: HIM Documentation

Quick Reg

The PHN Request was successful.

Medical Record Number: 70000951 | Encounter Number: | Last Name: RUBBLE | First Name: BMM-BMM | Middle Name: | Preferred Name: | Previous Last Name: | Date of Birth: 22 Feb-2000 | Age: 17Y | Gender: Male | BC PHN: 9876405325

ALERTS | Patient Information | Encounter Information | Insurance | Insurance Summary

Encounter Type: Data Storage | Medical Service: HIM Documentation | Reason for Visit: |

Location: |

Facility: LGH Lions Gate | Building: | Unit/Clinic: | Bed Availability: | Room: | Bed: |

Care Providers: |

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: Poon, Sylvia

- 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: 13-Dec-2017 | Registration Time: 12:36 | Quick Reg User Name: 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.

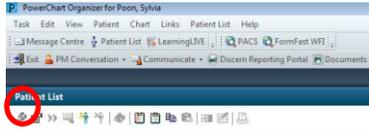
There are ten different types of lists, some of which are populated automatically by the system, while the Custom list is built manually. For example, the computers located in the inpatient areas are defaulted to display the Patient List of the Location of the computer – computers in 3 East at LGH will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

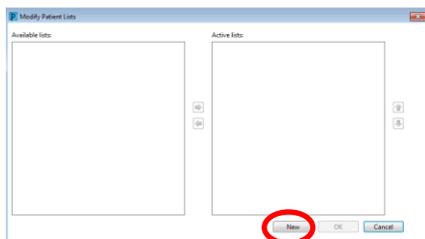
Activity 4.1 – Build a Custom Patient List

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

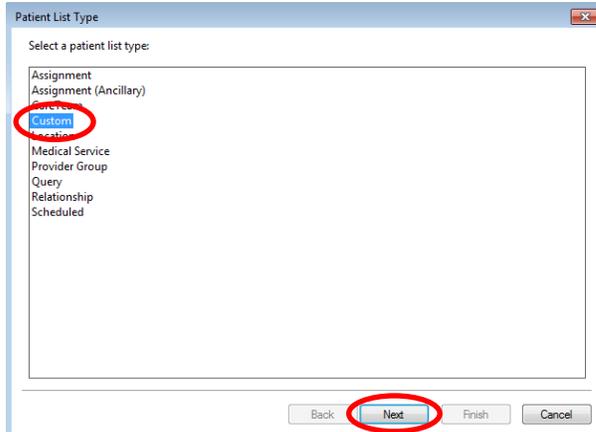
2 The Patient List window will display. Click the **List Maintenance** wrench icon .



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**.



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.

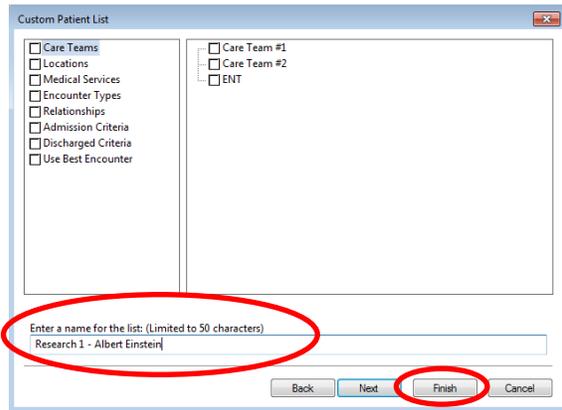


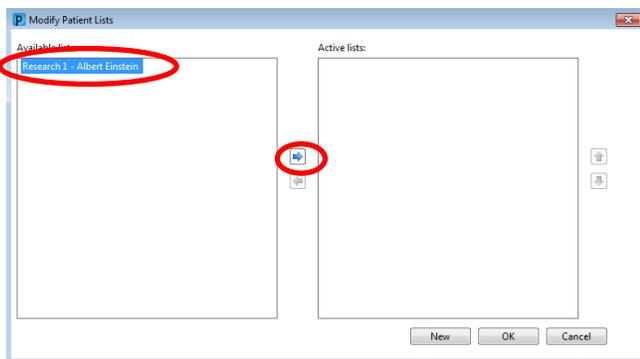
Table of Standard Naming Convention:

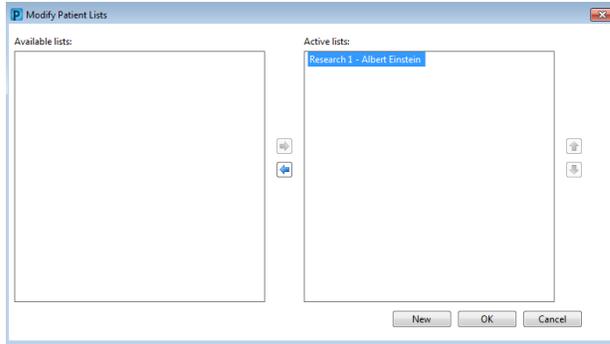
External Requester	Standard Naming Convention	Example
Research	Research # - Principal Researcher's Name	Research 1 – Albert Einstein
ROI Requester	Requester's Organization – Requester's Name	MCFD – Katniss Everdeen

- 6** The Custom Patient List will now appear as an Available list in the left-hand pane. To be able to view this list in PowerChart you will have to move it to the Active lists in the right pane.
- Single-click on the Custom Patient List in the Available lists pane
 - Click  to move it to the Active List pane

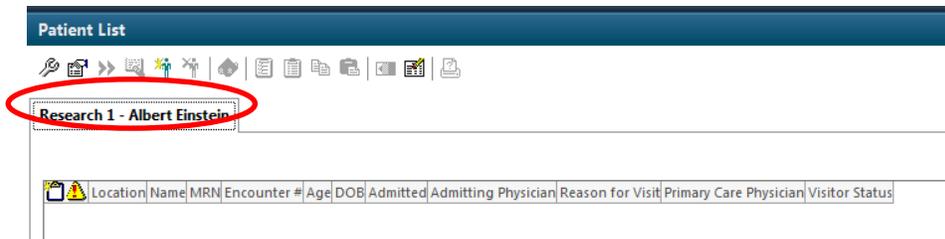
The Custom Patient List will now appear as an Active list and is available to view in PowerChart.

Click **OK** to close the box.





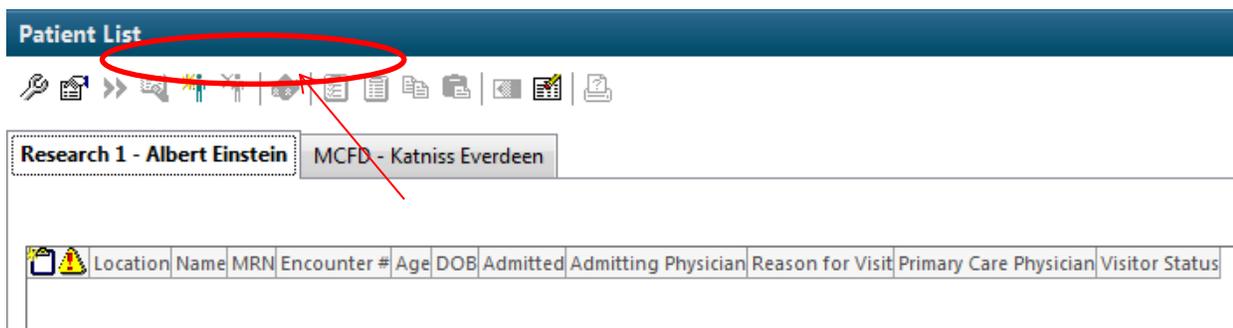
7 Your Custom Patient List will display in your Patient List window.



Activity 4.2 – Add / Remove Patients from Patient Lists

Adding Patients

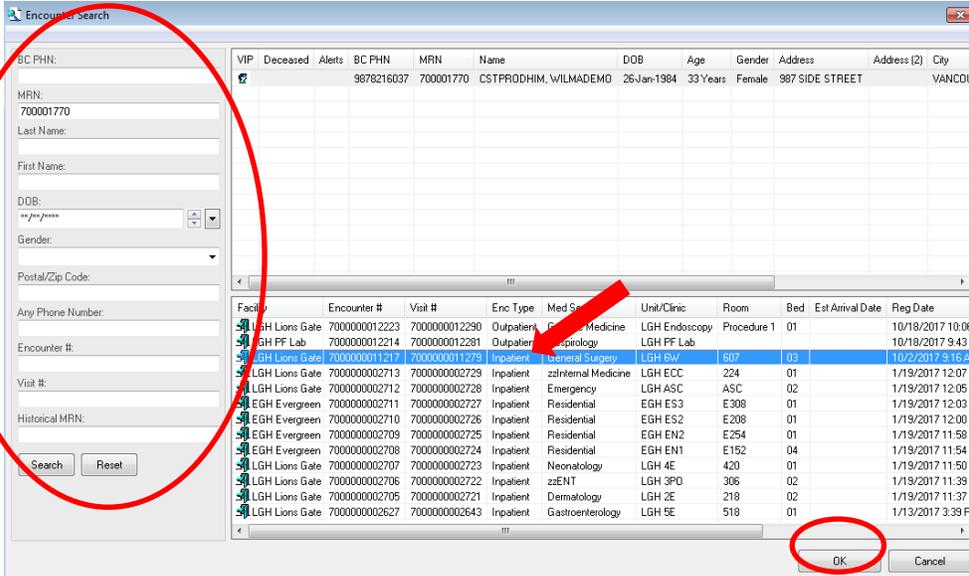
1 In the Patient List window, select the appropriate Patient List by clicking on the tab.



2 Click on the 'Add Patient' icon 

3 The standard Patient Search window opens.

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



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.

Patient List

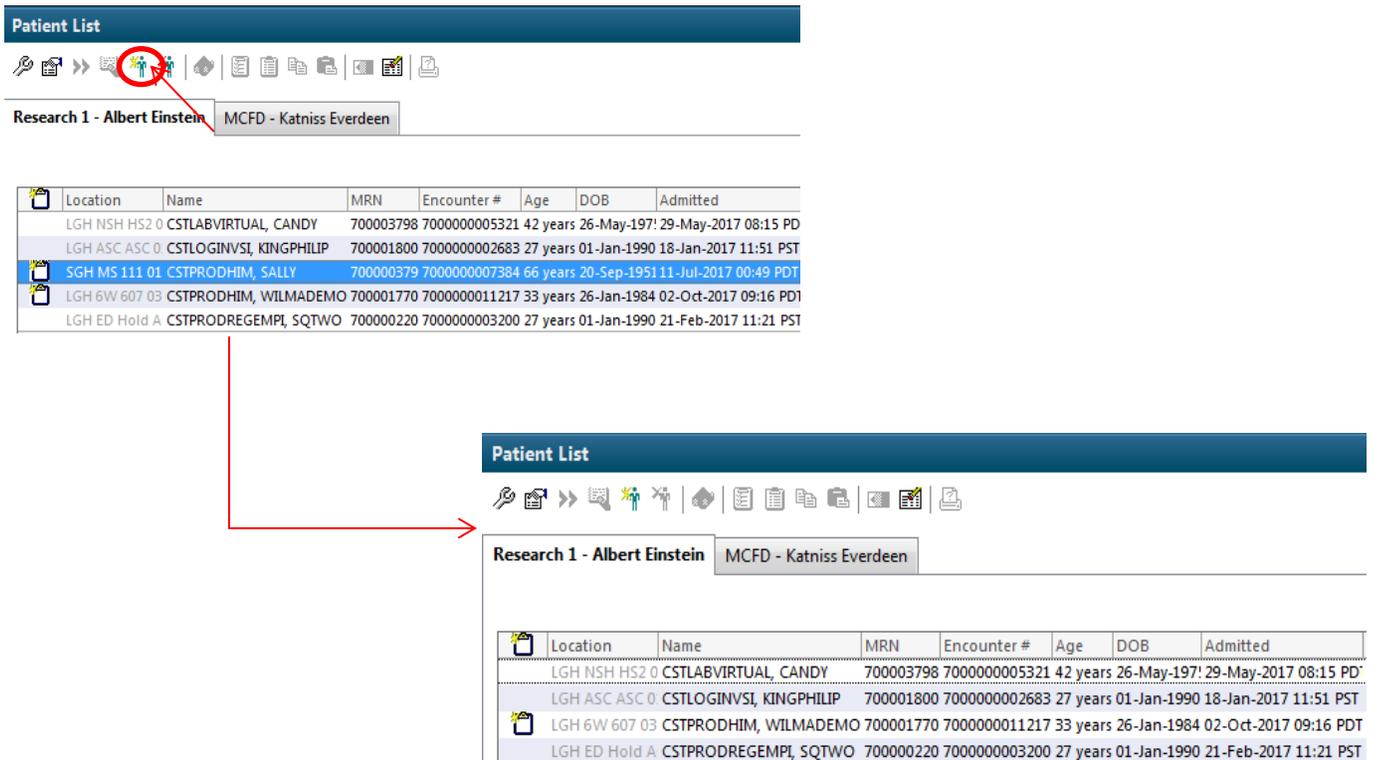
Research 1 - Albert Einstein MCFD - Katniss Everdeen

Location	Name	MRN	Encounter #	Age	DOB	Admitted	Admitting Physician	Reason for Visit	Primary Care Physician	Visitor Status
SGH MS 111 01	CSTPROD HIM, SALLY	700000379	7000000007384	66 years	20-Sep-1951	11-Jul-2017 00:49 PDT		demo	Plisvck, Rayford, MD	
LGH ASC ASC 0	CSTLOGIN VSI, KINGPHILIP	700001800	7000000002683	27 years	01-Jan-1990	18-Jan-2017 11:51 PST		Test	CERNER, CERNER	
LGH ED Hold A	CSTPRODREGEMPI, SQTWO	700000220	70000000003200	27 years	01-Jan-1990	21-Feb-2017 11:21 PST		Test	Plisvca, Rocco, MD	
LGH 6W 607 03	CSTPROD HIM, WILMADEMO	700001770	70000000011217	33 years	26-Jan-1984	02-Oct-2017 09:16 PDT		Surgery	Plisvcn, Herb, MD	
LGH NSH HS2 0	CSTLABVIRTUAL, CANDY	700003798	70000000005321	42 years	26-May-1977	29-May-2017 08:15 PDT		testing lab	Plisvcn, 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 Patient** icon .



Patient List

Research 1 - Albert Einstein | MCFD - Katniss Everdeen

Location	Name	MRN	Encounter #	Age	DOB	Admitted
LGH NSH HS2 0	CSTLABVIRTUAL, CANDY	700003798	7000000005321	42 years	26-May-1977	29-May-2017 08:15 PD
LGH ASC ASC 0	CSTLOGINVISI, KINGPHILIP	700001800	7000000002683	27 years	01-Jan-1990	18-Jan-2017 11:51 PST
SGH MS 111 01	CSTPROD HIM, SALLY	700000379	7000000007384	66 years	20-Sep-1951	11-Jul-2017 00:49 PDT
LGH 6W 607 03	CSTPROD HIM, WILMADEMO	700001770	7000000011217	33 years	26-Jan-1984	02-Oct-2017 09:16 PDT
LGH ED Hold A	CSTPRODREGEMPI, SQTWO	700000220	7000000003200	27 years	01-Jan-1990	21-Feb-2017 11:21 PST

Patient List

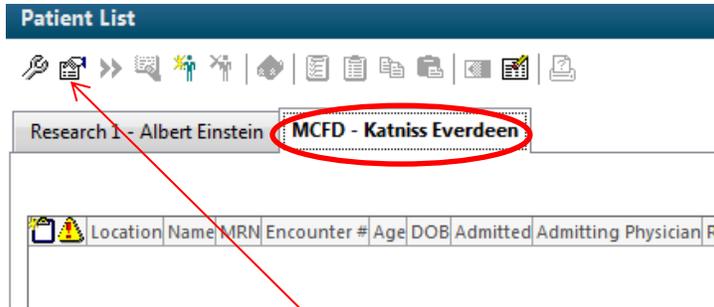
Research 1 - Albert Einstein | MCFD - Katniss Everdeen

Location	Name	MRN	Encounter #	Age	DOB	Admitted
LGH NSH HS2 0	CSTLABVIRTUAL, CANDY	700003798	7000000005321	42 years	26-May-1977	29-May-2017 08:15 PD
LGH ASC ASC 0	CSTLOGINVISI, KINGPHILIP	700001800	7000000002683	27 years	01-Jan-1990	18-Jan-2017 11:51 PST
LGH 6W 607 03	CSTPROD HIM, WILMADEMO	700001770	7000000011217	33 years	26-Jan-1984	02-Oct-2017 09:16 PDT
LGH ED Hold A	CSTPRODREGEMPI, SQTWO	700000220	7000000003200	27 years	01-Jan-1990	21-Feb-2017 11:21 PST

Activity 4.3 – Modify / Delete Patient Lists

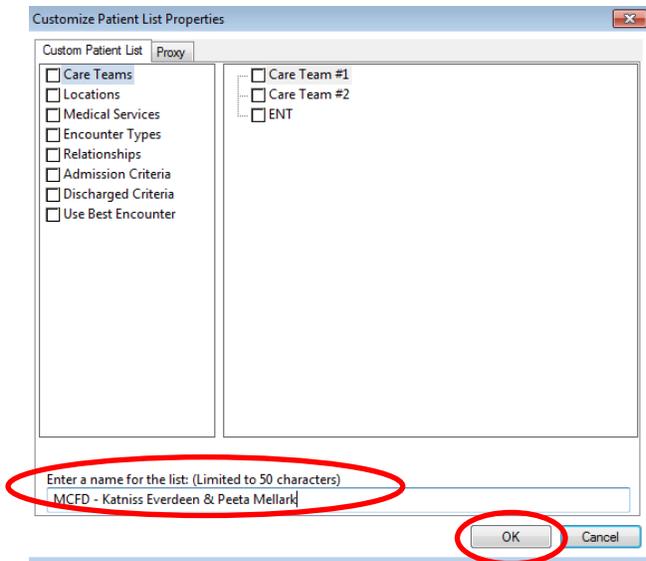
Modifying Patient Lists

- 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.



3 Click on the **Properties** icon  .

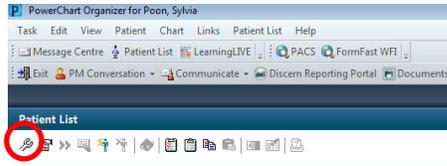
4 The **Customize Patient List Properties** dialogue box opens.
As HIM use of these filters will be very minimal, changes would typically be limited to changes to the *names* of the Patient Lists as needed.
Click **OK** to complete the activity.



Deleting Patient Lists

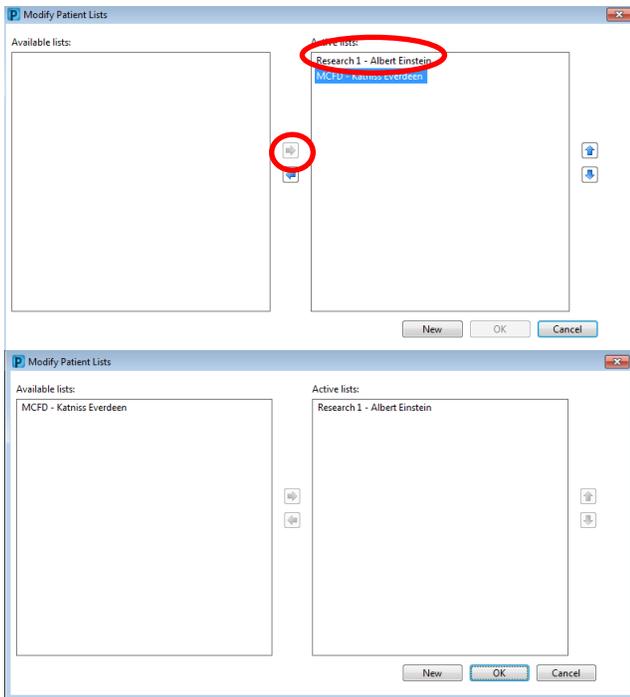
1 Once the researcher and/or ROI requester is completed reviewing their list of patient charts in PowerChart, you can delete the Custom Patient List.

2 From the Patient List view, click the **List Maintenance** wrench icon  .



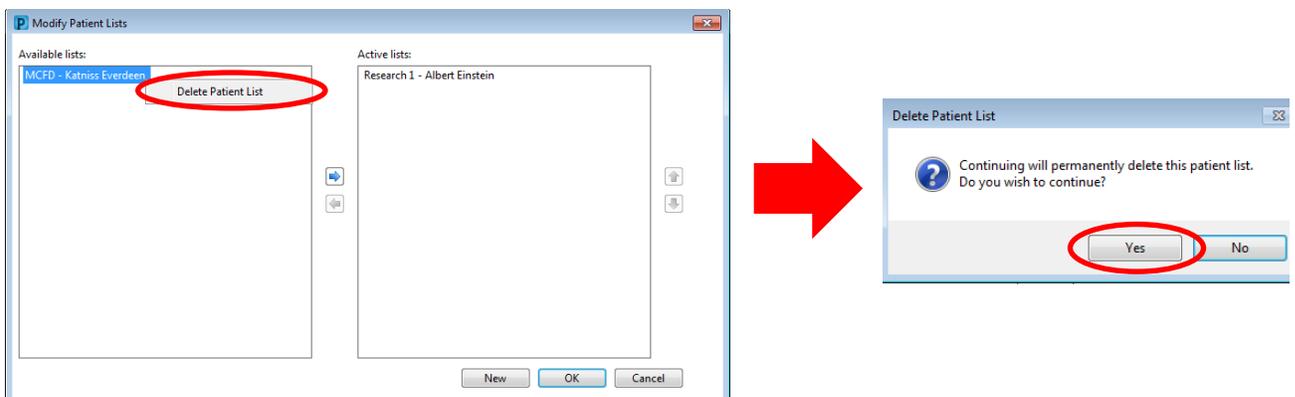
3 The Modify Patient Lists dialogue box opens.

Select the Custom Patient List you wish to delete from the Active lists pane and click  to move it to the Available lists pane.



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

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



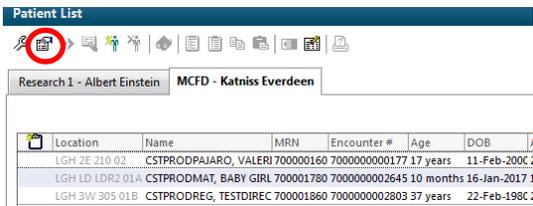
The Custom Patient List will no longer appear in your Patient List view.

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.

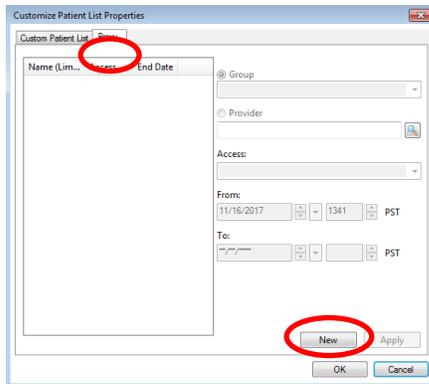
Activity 4.4 – Granting Proxy to a Patient List

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

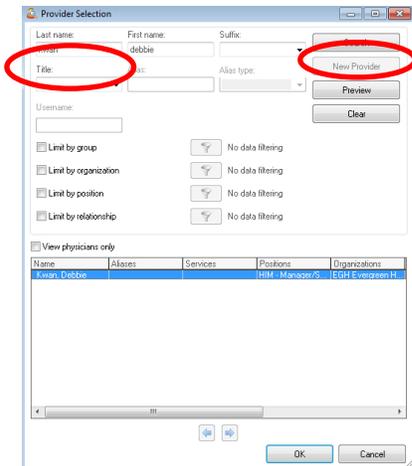
- 1 From the Patient List window, click on the **Properties** icon  .



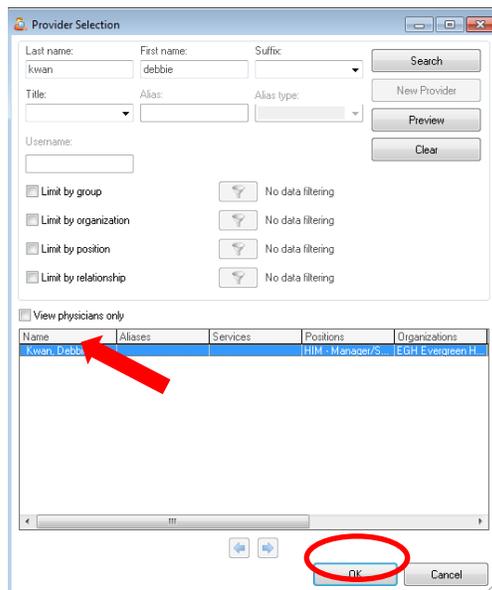
- 2 The Customize Patient List Properties dialogue box opens.
Click the **Proxy** tab to open the Proxy Tool.
Click **New**.



- 3 From the Customize Patient List Properties dialogue box, select the **Provider** radio button.
Click the magnifying glass to the  right 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**.



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

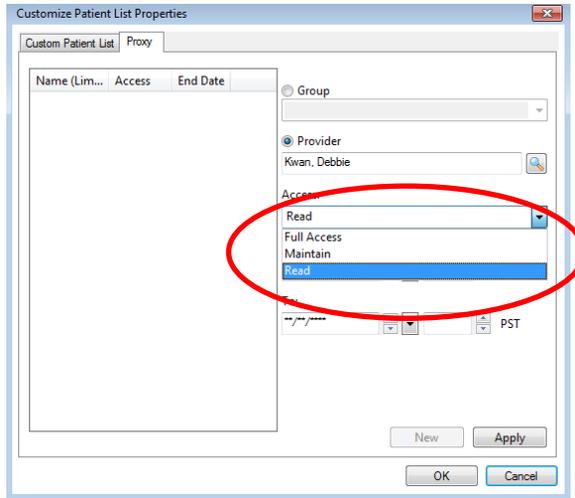


- 5 Click on the down arrow to the right of the **Access** field.

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.

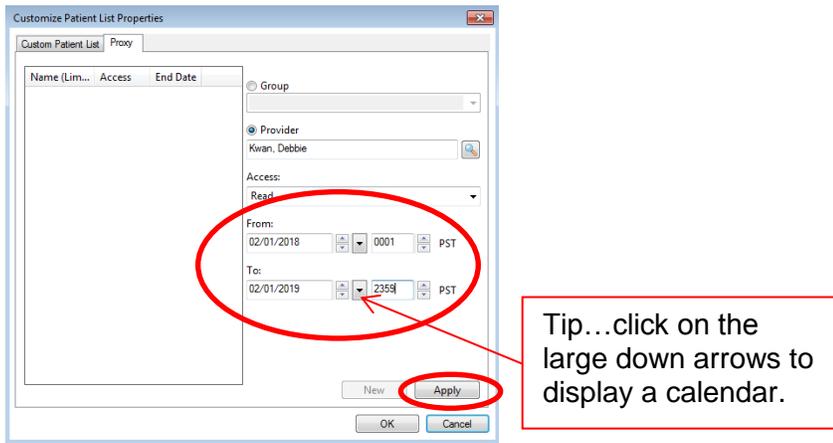
For researchers and external ROI requesters, select **Read**.



6 Enter the start and end date of the proxy.

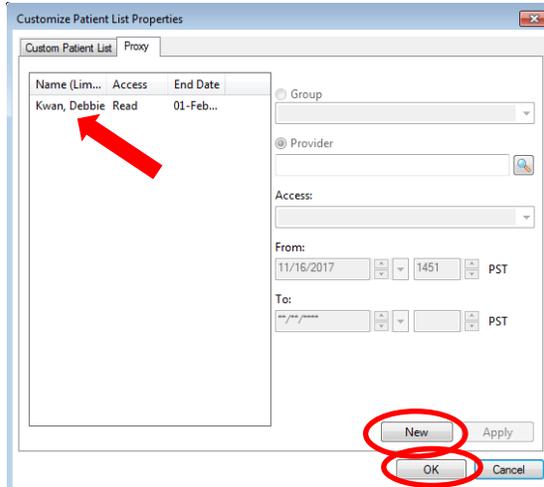
If you plan for this Patient List to be shared for a long-term, pick a date well into the future. For researchers, pick the valid research dates that are specified on the Institutional Approval or Research Extension Form.

When you have completed all the fields, click **Apply**.



7 Your proxy will be displayed.

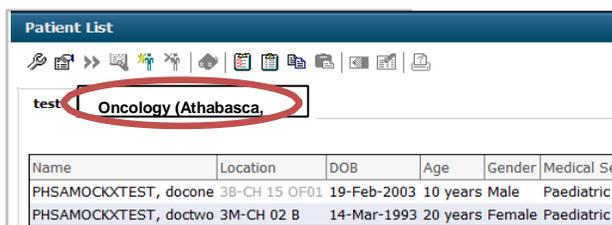
You can either select **New** to add an additional proxy or click **OK** to complete the action.



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.

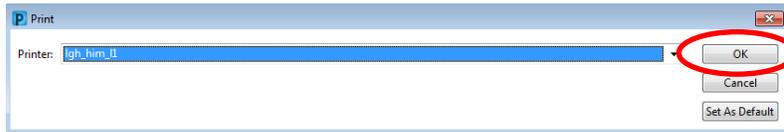


Activity 4.5 – Printing a Patient List

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



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



Appendix A: Listing of Cerner Documents for External Distribution

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

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

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

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

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

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

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

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

	<i>Ophthalmology Procedure Note</i>		78657-4	Yes	Yes	
	<i>Orthopedic Surgery Procedure Note</i>		84374-8	Yes	Yes	
	<i>Pain Management Procedure Note</i>		68714-5	Yes	Yes	
	<i>Palliative Medicine Procedure Note</i>		82357-5	Yes	Yes	
	<i>Pediatrics Procedure Note</i>		68820-0	Yes	Yes	
	<i>Plastic Surgery Procedure Note</i>		83854-0	Yes	Yes	
	<i>Physical Med and Rehab Procedure Note</i>		83728-6	Yes	Yes	
	<i>Podiatry Procedure Note</i>		28625-2	Yes	Yes	
	<i>Procedure Note Other</i>		28570-0	Yes	Yes	
	<i>Psychiatry Procedure Note</i>		83891-2	Yes	Yes	
	<i>Rheumatology Procedure Note</i>		78660-8	Yes	Yes	
	<i>Sleep Medicine Procedure Note</i>		X10868	Yes	Yes	
	<i>Spine Surgery Procedure Note</i>		X10900	Yes	Yes	
	<i>Sports Medicine Procedure Note</i>		79267-1	Yes	Yes	
	<i>Trauma Procedure Note</i>		78240-9	Yes	Yes	
	<i>Urgent Care Procedure Note</i>		X10874	Yes	Yes	
	<i>Urology Procedure Note</i>		78659-0	Yes	Yes	
	<i>Vascular Surgery Procedure Note</i>		84053-8	Yes	Yes	
<i>Nursing Documentation</i>	<i>Nursing Narrative Note</i>		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.

<i>Allied Health Documentation</i>	<i>Mental Health Counsellor Note</i>		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.
	<i>Occupational Therapy Note</i>		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.
	<i>Psychology Assessment</i>		83906-8	Yes	Yes	
	<i>Psychology Note</i>		83905-0	Yes	No	As per PARIS-Cerner Information Sharing Requirements & CST-15048 Mental Health Document Type Audio-Distribution to Excelleris, Psychology Note should go to CareConnect only, and not to Excelleris.
	<i>Social Work Note</i>		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.

<i>Interdisciplinary Documentation</i>	<i>Interdisciplinary Care Plan</i>		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.
<i>Maternity Documentation</i>	<i>Obstetrics Delivery Note</i>		X10838	Yes	Yes	
	<i>Labour and Birth Summary</i>		57057-2	Yes	Yes	
<i>Discharge Documentation</i>	<i>Discharge Summary</i>		18842-5	Yes	Yes	
<i>Surgical Documentation</i>	<i>Operative Report</i>		11504-8	Yes	Yes	
<i>Anesthesia Records</i>	<i>Anesthesia Record</i>		11485-0	Yes	Yes	
<i>Letters</i>	<i>Letter Provider</i>		75475-4	Yes	Yes	
<i>Rehabilitation Notes</i>	<i>Cardiology Rehab Note</i>		X10808	Yes	Yes	
<i>Referral and Transfer Documentation</i>	<i>Transfer Note</i>		18761-7	Yes	Yes	