WORKPACKAGE CST Transformational Learning N96

Health Information Management: Clerk IV Record Completion / Quality Checks

Last update 2018/08/08 (N96)

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ACTIVITY 1 – Patient Deficiency Analysis

Learning Objectives

- At the end of this activity, you will be able to:
- Add a Deficiency
- Adding a Signature Annotation for Deficient Scanned Documents
- Update the Status of a Deficiency
- Delete a Deficiency
- View a Deficiency History
- Add Notes

Activity 1.1 – Adding a Deficiency

Setting Preferences



2 The Patient Deficiency Analysis window will open.

Click on View and select Options



Click Settings tab and in Default Deficiency Status drop down select Dictate/Create. Click Ok.

RANSFORMATIONAL

CLINICAL + SYSTEMS

×
View Settings Sorting Debugging User's Facilities
Personnel Lookup Defaults
By name Physicians only
🔿 By alias
Physician Tag Colors
Auto assign tag colors
Work with Tasks of Type
QA - Day Surgery 🗸
Default Deficiency Status
Dictate/Create
Dictate/Create
Pending Signature Pending Transcription
Auto refresh 5 Minutes
OK Cancel

Click on the **Analysis Queue** button do to open your task queue.

Patient Deficiency A Task Visit Deficiency	nalysis y View Hep					
🏚 🗄 🍽 🖨 🏟	🖲 🖻 🖬 🖉 🕨	9 🖪			Tracking ID:	
Patient: FIN number: Visit status:	U	MRN: Admit date: Allocation date:	Birth date: Discharge date: Facility:	Sex: Patient type:		
Discurrent	Physician Type	Status Status	Aloc Date	Allocation Date	H Vita Details Add Dada Perconel Deficiencies Deficiencies Deficiencies Perconel Deficiencies D	
					Comparison of the second	, filter only applies to



4 The Task Queue window will open.

To filter out displaying tasks that are completed from the Task Queue, select **View, Options...** from the Task Queue task bar.

L Task Queue									
) 11	As of 3:	52:10 PM QA	- Inpatie	nt					
Comple	ete / In Proc	ess / Pendin	g / Ope	ned / On Hold					
MBN	Task S	itatus Task Ty	pe Re	ason					
7000	07736 Pendir	g QA ∙ Inp	atient						
TY 7000	07666 Pendir	g QA-Inp-	atient						
7000	01770 Pendir	g QA - Inp-	atient						
7000	02849 Pendir	g QA-Inp-	atient						
7000	06510 Pendir	g QA · Inp-	atient						
	Comple Comple MBN 7000 7000 7000 7000 7000 7000	Main As of 3th complete / In Proc MRN Task 5 700007736 Pendin 7000017730 700001770 Pendin 700002849 Pendin 700002849 Pendin 700002849 Pendin 700002840 Pendin 700002840 Pendin	Main As of 3.52:10 PM QA complete / In Process / Pendin MRN Task Status Task Ty MRN Task Status Task Ty 700007736 Pending QA - Inp. 700001770 Pending QA - Inp. 700001770 Pending QA - Inp. 700001770 Pending QA - Inp. 700002843 Pending QA - Inp. 7000002849 Pending QA - Inp. 700006510 Pending QA - Inp.	As of 3.52:10 PM OA - Inpatie Omplete / In Process / Pending / Ope MRN Task Status Task Type Re 700007736 Pending QA - Inpatient 700007769 Pending QA - Inpatient 700007709 Pending QA - Inpatient 700002849 Pending QA - Inpatient					

5 From the Options window under the View tab, select the radio button for **Hide tasks of this status** and select **Complete.** Click **OK.**

Options	6
View Query Printing Export	
Hidden Tasks	
Children al taxo	
Hide tasks of this status	
Complete	
Pending	
Upened On hold	
Rework	
Promot to modify task note when a task is saved	
Include time in date/time column sort	
OK Cancel ár	nnlu
Cuicu A	40

Task Queue Task View Help

🚔 🏘 🔶 🖮 😭 🖶 🖥 🌒 🎽 🖓 🗛 of 16:51:55 🛛 QA - Inpatient

- 6 Click the Choose Task Type button (3 dots/ellipsis). I Task Queue Task View Help A and 1651.55 DA-Inpatent →
- 7 In the Task Types dialogue box, select the encounter type you want to QA (Day Surgery OR Inpatient). Click **OK**.

🛱. Task Types	×
Assembly - Residential	
Prep\Scan - Reconciliation QA - Day Surgery	
QA - Inpatient	
OK (As of) Ca	incel

8 Click the arrow on the drop-down box for Facility. Select the main hospital as the facility.

LGH Lions Gate Hospital

5

9

Click on the **Discharge Date** column header to put the dates in date order (oldest on top).

Name	MBN	Task Status	Task Type	Reason	User	Update Date	🗥 Create Date	Admit Date	/ Discharge Date	atient Type
CSTPRODHIM, HIMTESTING	700000414	Complete	QA - Inpatier	t	TestUser, Clerk-HIM	16-0ct-2017 08:02:00	24-May-2017 14:26:41	20-Dec-2016 10:51:00	20-Dec-2016 11:21:00	Inpatient
CSTPRODHIM, SALLYDEMO	700000378	Complete	QA · Inpatier	t	TestCST, Clerk-HIM1 HIM	06-Nov-2017 14:59:00	24-May-2017 14:29:32	09-Jan-2017 11:18:00	18-Jan-2017 00:01:00	Inpatient
CSTPRODHIM, WILMADEMO	700001770	OnHold	QA - Inpatier	t Analysis - For Review	Poon, Sylvia	15-Sep-2017 11:55:48	24-May-2017 14:32:23	19-Jan-2017 11:37:00	19-Jan-2017 11:39:00	Inpatient
CSTPRODHIM, WILMADEMO	700001770	OnHold	QA - Inpatier	t Analysis - For Review	Poon, Sylvia	26-Jul-2017 08:14:15	24-May-2017 14:33:08	19-Jan-2017 11:50:00	19-Jan-2017 11:54:00	Inpatient
CSTPRODHIM, UTTESTPATIENT	70000023	OnHold	QA - Inpatier	t Analysis - For Training Review	TestUser, Clerk-HIM	07-Jul-2017 10:27:00	24-May-2017 08:15:19	28-Nov-2016 15:43:00	28-Mar-2017 15:41:00	Inpatient

10 Working from the oldest discharge date, double click on the appropriate encounter.

Name	MBN	Task Status	Task Type	Reason	User	Update Date	🛆 Create Diate	Admit Date	🔺 Discharge Date	Natient Type
CSTPRODHIM, HIMTESTING	700000414	Complete	QA - Inpatient		TestUser, Clerk-HIM	16-0ct-2017 08:02:00	24-May-2017 14:26:41	20-Dec-2016 10:51:00	20-Dec-2016 11:21:00) Inpatient
CSTPRODHIM, SALLYDEMO	700000378	Complete	QA - Inpatient		TestCST, Clerk-HIM1 HIM	06-Nov-2017 14:59:00	24-May-2017 14:29:32	09Jan-2017 11:18:00	18-Jan-2017 00:01:00	Inpatient
CSTPRODHIM, WILMADEMO	700001770	OnHold	QA - Inpatient	Analysis - For Review	Poon, Sylvia	15-Sep-2017 11:55:48	24-May-2017 14:32:23	19Jan-2017 11:37:00	19-Jan-2017 11:39:00	Inpatient
CSTPRODHIM, WILMADEMO	700001770	OnHold	QA - Inpatient	Analysis - For Review	Poon, Sylvia	26-Jul-2017 08:14:15	24-May-2017 14:33:06	19Jan-2017 11:50:00	19-Jan-2017 11:54:00	Inpatient
CSTPRODHIM, UTTESTPATIENT	700000023	OnHold	QA - Inpatient	Analysis - For Training Review	TestUser, Clerk-HIM	07-Jul-2017 10:27:00	24-May-2017 08:15:19	28-Nov-2016 15:43:00	28-Mar-2017 15:41:00	Inpatient
CSTPRODHIM, WILMADEMO CSTPRODHIM, WILMADEMO CSTPRODHIM, UTTESTPATIENT	700001770 70000023	OnHold OnHold	QA - Inpatient QA - Inpatient	Analysis - For Review Analysis - For Review Analysis - For Training Review	Poon, Sylvia TestUser, Clerk-HIM	26Jul-2017 10:14:15 07Jul-2017 10:27:00	24-May-2017 14:32:23 24-May-2017 14:33:06 24-May-2017 08:15:19	19Jan-2017 11:57:00 19Jan-2017 11:50:00 28-Nov-2016 15:43:00	19-Jan-2017 11:54:00 28-Mar-2017 15:41:00	Inpatient Inpatient Inpatient



Note: If you notice that the **Discharge Date is blank**, that indicates that this encounter has been cancelled and this task can be "Completed".

11 The Patient Deficiency Analysis window will open.

Patient Information displays in the banner bar at the top (i.e. Discharge Date)

Check the boxes next to the deficiency Statuses that you wish to have displayed.

Task Vost Deticincy View Help	
	Tracking ID:
Patient: CSTPRD0HH, CHERRY MRN. 700002949 Bith date: 03 May 1956 Sex Fanade FN madee: 700000001252 Aniel date: 02:04:2317 Discharge date: 03:04:2317 Patient type: Inpatient Visit stutes: recomplete Advocation dete: 03:04:2317 Faller Explanation (Faller State)	
/ Document Physician Status Alloc Date	4 4Veik1 of 1 → >>
🖸 🖳 Cardiology Consult - 21 Nov-2017 14:34 PST Auth (Verified)	Vian Fort
L TestPET, Reident, MD Completed	Deliciencies
L Colonoscopy - U2-UC-2017 12-34 PUT Anticipated 20Nor-2017	Add Auto Update Delete
🔲 🚆 Discharge Summary - 02-0ct-2017 12-57 PDT Auth (Verified)	Personnel guick pick:
E Schneider, Maggie Completed	Plavca, Hocco, MD (Admiting Physician A Plavcb, Stuart, MD (Attending Provider
Discharge Summary - 03-0et-2017 10:50 PDT Auth (Venited)	Pizvcf, Dillon, MD Referring Provider
Testione, Landogue rysicae, Mo Campeled Testine, Privace Rev Priviciae, MO Campeled (3) 0/2017	Schneider, Maggie
TestUser, Flox Physician, MD Compand 03 Oct-2017	 Deficient personnel:
Lease Index descharges	
2 Urdel 199e miyoon Status Macalatin Dale	Persognet. Update date/time in PDT:
	Add Add Advance
	Annotation:
Result type: Cardiology Consult	▲ Complete* V Pending
Result date: Tuesday, 21-November-2017 4:34 PST	In progress Expected
Result status: Auth (Verified)	V Unassigned
Neson due: Consult voide Consu	the completed orders are not shown. Rec. or applies to
Verified by: TestPET, Resident, MD on Tuescay, 21-November-2017 14:33 PST	4000
Encounter Info: 700000011252, LGH Lions Gate, opatient, 02-Oct-2017 - 034 Oct-2017	
	Submit Bawart
* Final Report *	
Chief Complaint Problem List/Past Medical History Revised instructions for the formation of	
Historia Historia	
No historical problems	

From this window, you will get a listing of all documents posted to this patient's record and the status of each document in the top pane.

If you click on a document in the top pane, it will appear in the bottom pane.

Note: If the provider chooses the wrong encounter or document type, the document you are searching for may not be listed in the right encounter and/or correct document type. It is best practice that if you do not find the document in the Patient Deficiency Analysis window, you review the patient's health record by launching PowerChart.



Document Statuses

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

12 Based on the criteria set out in the standard Quantitative Analysis SOP, identify those documents that are incomplete/deficient by reviewing the health record.

Launch PowerChart by clicking on the PowerChart icon P and search for the documents using the applicable tabs within the Menu.

Documents can be directly typed, transcribed or scanned into Cerner.

Patient Deficiency Analysis	
Task Visit Deficiency View Help	-
🗽 🖑 📴 🖴 🎰 🗉 🖻 🖬 🖉 🌩	
Patient: CSTPRODHIM, CHERRY FIN number: 7000000011252	MRN: 700002849 Admit date: 02-Oct-2013

Helpful Hints of Where to Look in Cerner Millennium and PowerChart for the Assignment of a Deficient Discharge Summary:

Patient Deficiency Analysis:Check for Discharge SummaryNotes & Documentation Tab:Check for Discharge SummaryCoding Clinical Summary:Check for Admission/Discharge Date, Length of Stay (LOS) and
Discharge Disposition

Helpful Hints of Where to Look in Cerner Millennium and PowerChart for the Assignment of a Deficient Operative Report:

Patient Deficiency Analysis:Check for Operative ReportsNotes & Documentation Tab:Check for Operative Reports, Anesthetic Reports, Consent for
Procedures, Any Pre/Intra/Inter Operative ReportsResults Review Tab:Check Diagnostics for any Procedures done in Medical Imaging

Note: Add visit note when you need to assign more than one Operative Report for the same patient, same encounter and same provider.

	CSTPRODHIM, CHERRY 🛛 🛛					
	CSTPRODHIM, CHERRY		DOB:03-May-1966	MRN:700002849	Code Status:	
	Alleraies: Alleraies Not Recorded		Age:51 years Gender:Female	Enc:/000000011252 PHN:9878087453	Dosina Wt:	
	Menu 7	< > 🛪 🏠 Docum	entation			
(Noter					
		🕂 Add 🖩 Submit 🚛 🖿	Forward Provider Letter	Modify 🐂 🖤 🕈 🖬 🖬 In E	rror Preview	
	Orders T Add	List				
5	Results Review					
<	Documentation	Display : All	▼			
	Patient Information		.			
	Medication List 🛛 🕂 Add	Service Date/Time	Subject			Туре
0	Coding Clinical Summary	21-Nov-2017 14:34:00 PST 21-Nov-2017 09:20:00 PST	Consult Note MAID			Cardio
	Discusses and Backlasse	20-Nov-2017 11:53:00 PST	Letter Admin Closure			Letter
	Diagnoses and Problems	06-Nov-2017 10:46:00 PST	Consult Note			Cardio
	Allergies 🕈 Add	06-Oct-2017 08:45:00 PDT				Letter
	Histories	06-Oct-2017 07:29:00 PDT	test			I Have
		03-Oct-2017 10:50:00 PDT	Discharge Summary			Dischi
	Birth Certificate	02-Oct-2017 12:57:00 PDT	Discharge Summary			Dischi
		02-Oct-2017 12:54:00 PDT	Colonoscopy			Colon
		13-Jul-2017 14:02:02 PDT	BC Medical Assistance in Dying -	Consultant's Assessment of Patient'	s Informed Consent Decision Capability	Medic
	Clinical Research	13-Jul-2017 14:02:02 PDT	Medical Assistance in Dying Reco	rd of Assessment (Prescriber)		Medic
	ED Summary	13-Jul-2017 14:02:02 PD1	VCH Medical Assistance in Dying	-Consultant Assessment of Patient's	Informed Consent Decision Capability	Medic
	Form Browser	03-May-2017 14:02:02 PD1	History and Physical	Assessment Record (Assessor)		Histor
	Immunizations	03-May-2017 14:29:00 P	Discharge Summary			Dischi
	Infusion Documentation					
	MAR Summary					

١



13 To add a deficiency to the encounter, return to the Patient Deficiency Analysis window and select **Add**.

Patient Deficiency Analysis	- ÷ 🕹
Task Visit Deficiency View Help	
	Tracking ID:
Publick CSTPH00HIM, CHERINY MIN. 700002049 Birth date: (0.3 May 1565 See: Female FIN mather: 70000001152 Admit date: (0.0 cl. 2017) Databage date: (0.0 cl. 2017) Point type: Inpasient Visit stute::::complete Admit date: (0.0 cl. 2017) Folio type july Expasient	
Contract Providen Providen Providen Providen Providen Providen Providen Providen Contractory Contextory Contractory Contractory Contractory Conte	If Veal.tdl Image: Define Add Auto Update Define Proces, Racco, MOL Admining Physician Proces, Racco, MOL Admining Physician Image: Physician Proces, Racco, MOL Admining Physician Proces, Racco, MOL Administry Physician Image: Physician Proces, Resc, RM, IC Annully Physician Image: Physician Image: Physician Optioner proces Image: Physician Image: Physician
/ Oder Type Physician Status Jakocation Dele	Personal Update date frage in PDT: Add www.minitian PDT: Arregation: Personal PDT: Arregation:
Result type: Cardiology Consult Result date: Tuesday, 21 Hovember 2017 14:34 PST Result date: Aud (Verfiled) Result status: Aud (Verfiled) Performed bp: TarSFT, Resident, MD on Tuesday, 21-Hovember 2017 14:35 PST Verfined bp: TarSFT, Resident, MD on Tuesday, 21-Hovember 2017 14:35 PST Secouter inflo: 70000001152; Carlot Holes Gate, TarGender, C2-0ct-2017	Complete Pending In progress Proving Proving
* Final Report *	Submit Revent

14 The Deficiency Update screen will appear.

The Personnel quick pick box will display care providers who have been assigned a relationship to the patient and who you would likely assign a deficiency to.

If the provider is listed in the Personnel quick pick box, double-click on the provider to move their name to the Deficient personnel box.

If you would like to choose a different care provider, type in their name (last, first) or click on the magnifying glass S to search.

Plisvca, Rocco, MD Admitti Plisvch, Stuart, MD Attendir] Physician	
Plisvof, Dillon, MD Referring Plisvou, Jese, RM Consultin Schneider, Maggie	Provider Provider	
* Deficient personnel (by nar	e): Event date/time in PDT:	
	Add RX_XXX XXXX	
Oncology Gynecologic Oncology Hereditary Co	Remove Document	
Oncology Medical Consult	Document Physician Status	
Uncology Pain and Sym		
Oncology Surgical Consult		
Oncology Other Consult		
Abdominal Ultrasound		
Anesthesia Record		
Balloon Aortic Valvulopi Brainstem Electrical Bes		
Bronchoscopy		
Cardiac Catheterization		
Cardiopulmonary Stress		
Coding Query		
Colonoscopy Consult Note Constin		
Consult Note Generic		
Discharge Summary		
Carotid Ultrasound Coding Query Colonoscopy Consult Note Generic		
D: 1 D		
Colonoscopy Consult Note Generic		

15 The Provider Selection window will appear. Enter **Last Name** and click **Search**, all providers that match your search will appear in the bottom pane.



16 Select the provider to assign the deficiency to, and click **OK**.

The provider will appear in the Deficient personnel box.

- Note: If there are multiple providers with the same name, you can use the Position column to determine which one is the correct provider.
- **17** Select the Deficiency Document from the left pane by clicking on it.

Deficiency Update	
Personnel quick pick: Pilsvea, Rocco, MD I Admitting Physician Pilsveb, Suart, MD I Attending Provider Personal documents in Provider Personal years, PAIL Consulting Provider	
* Deficient personnel (by name): Event date/time in PDT:	
Smith John Michael 🔍 Add 🕬 🖉 🗸	
Abdominal Ultrasound Anesthesis Record Remove Document Branstem Electrical Res Bransbergunnoney Stress Cardia Casheleization Cardid Ultrasound Coding Query Colonoscopy Consult Note Generic Discharge Summay Echo Report Echocadiogram Transt E Deceedingem Stress Echocadiogram Transt E Deceedingem T	
	Liose



18 The selected document and provider will appear in the right pane.

The Status will default to "Dictate/Create". Once this deficiency is created, the anticipated document will flow to the Deficient Folder in the provider's Message Center.

	Deficiency Update
Beforency Update Constrained gabby Edd: Person Record Dirachard Provider Person, Record Provider Person, Reco	Detectery update Percent auch pick Percent
E chocadogam Frant. E Di Note Prove Electrocadogam EVA Electrocadogam de la Electrocadogam de la Electrocadogam de la Electrocadogam de la Companya de la Co	Echocadogum Tann Electoredogum EKG Electoreceptaget Set Electoreceptaget Set Electorecepta

QA Status Cycle:

- Dictate/Create Anticipated
- Pending Transcription Dictated
- Pending Signature Transcribed
- Completed Auth (Verified)

19 The Event date/time will always default to the encounter's admit date. You can ignore this box. Deficiencies will be calculated in the back end using the discharge date.



20 If the provider or deficiency was selected in error, highlight what you want to delete and click the Remove document button Remove Document.

You will then be able to reselect the deficiency or provider.

Deficiency Update			
Personnel quick pick: Plisvca, Rocco, MD (Admitting) Plisvcb, Stuart, MD (Attending F Plisvcf, Dillon, MD (Referring Pr Plisvcu, Jese, RM (Consulting F Schneider, Maggie	Physician Provider ovider rovider	Î	
* Deficient personnel (by name) Consult Note Generic Discharge Summary Echo Report Echocardiogram Stress Echocardiogram Trense	Remove Document	Event date/time in PDT: Remove 02-0et-2017 v T1510 v Physician Status	
Echocardiogram Transt ED Note Provider Electrocardiogram EKG Electrophysiologic Study Electrophysiologic Study Electrophysiologic Study Electropic Study	L Discharge Summary L	Plisvca, Rocco, MD Dictate/Create	

21 To create the deficiency, click OK. Click Close.

Deficiency Update		
Personnel quick pick: Plisvca, Rocco, MD Admitting f Plisvcb, Stuart, MD Attending F Plisvcf, Dillon, MD Referring Fr Plisvcu, Jese, RM Consulting P Schneider, Maggie	Physician Provider Physician Provider Physician Provider Physician	
* Deficient personnel (by name):	Event date/time in PDT:	
Smith, John Michael	🧠 Remove 02-Oct-2017 🚔 💌 1451 🚔	
Abdominal Ultrasound Anesthesia Record Balloon Aortic ValvulopI Brainstem Electrical Res	Remove Document Document Physician Status	
Cardiac Catheterization Cardiopulmonary Stress	L Smith, John Michael Dictate/Create	
Carotid Ultrasound Coding Query Colonoscopy Consult Note Generic Discharge Summary Echo Report Echocardiogram Stress Echocardiogram Transt ED Note Provider Electrocardiogram EKG Electroencephalography Electroencephalography Electroencephalography		
	ОК	0 Close

22 The deficiency will appear on the top pane.

The deficiency Status can still be changed by clicking on it and selecting a new Status. You will be required to click on "white space" in order for the **Submit** button to appear as not dithered.

Click Submit.

Patient Deficiency Analysis	- 0 <mark>-</mark>
Task Varitz Deficiency Varv Help	Tracking ID:
Patient: CSTPRIDDHIM, CHERRY MRN: 700002849 Birth date: 03 May-1966 See: Female FIN number: 700000011252 Animit date: 02-0s-2017 Discharge date: 03 -0s-2017 Patient type: Inpatient Vrisk statu:: Incomplete Allocation date: 03-0s-2017 Facility: LGH Linns Gate Hospital	
/ Document Physican Statu Nate Date 2 Cardionogo Construit - 21 Nov-2017 11-53 (PDT) Aub (Varified)	Veit I of Veit I of P Veit I of P
Result state: Discharge Summary Result state: Tuseday, 03-octobe-2017 00:00 PDT Result state: Antipad Result state: Discharge Summary Performed by: Smith, John Michael on Tuseday, 28-November-2017 15:52 PST Encounter info: 700000011252, LGH Lions Gate, Inpatient, 02-Oct-2017 * Preliminary Report * This is an anticipated document.	Submit Revet



If you need to assign more than one Operative Report for the same patient, same encounter, same provider, add a Visit Note by clicking on the View/Update Notes icon
 In the Note View Form, complete the Contents and click on Save New Note.

	- 🕒 🖪 🖲				
Patient: CSTPRODHIM, CHERRY FIN number: 7000000011252 Visit status: Incomplete	MRN: 700002849BitAdmit date: 02-0ct-2017DitAllocation date: 03-0ct-2017Fat	irth date: 03-May-1966 ischarge date: 03-Oct-2017 acility: LGH Lions Gate Hospital	Ċ		ote View Form - 🗆 🗙
Document Deretive Report - 02-0ct-2017 12 Deretive Report - 02-0ct-2017 12 Dider Type Result type: Operative Report Result date: Antripated Result tate: Antripated Result title: Operative Report Peformed by: Smith, John Mich. Encounter info 7000000011252,	Physician C Statu 54 PDT Anticipa Smith, John Michael, MD Dictate/C Anticipa Smith, John Michael, MD Dictate/C Anticipa Image: Smith, John Michael, MD Dictate/C </th <th>Alloc Date Alloc Date Alloc Date Alloc Date Alloc Alloc Alloc Alloc Alloc Alloc Alloc Alloc Alloc T Alloc Alloc T T T O3-Oct-2017</th> <th>\rightarrow</th> <th>Notes for admit date: 02-0ct-2017</th> <th>Contents: Dr. John Smith - Please complete 2 separate Diperative Reports - one for the appendectomy and the other for the splenectomy.]</th>	Alloc Date Alloc Date Alloc Date Alloc Date Alloc Alloc Alloc Alloc Alloc Alloc Alloc Alloc Alloc T Alloc Alloc T T T O3-Oct-2017	\rightarrow	Notes for admit date: 02-0ct-2017	Contents: Dr. John Smith - Please complete 2 separate Diperative Reports - one for the appendectomy and the other for the splenectomy.]
	* Preliminary Repo	ort *	[Permanent note	
This is an anticipated document.			ļ	Print on deficiency slip Author	

- ²⁴ If the patient has multiple deficient documents, continue with the steps above for adding a deficiency until all deficient documents are added.
- If you are working from the Analysis Queue, click **Complete Analysis Task** to complete the task from the queue.



26 The Complete task window will appear with the current date/time auto-filled. Click OK.



27

To QA the next patient click on the blue arrow (next task).



Activity 1.2 – Adding a Signature Annotation for Deficient Scanned Documents

In some cases, we may receive documents such as Discharge Summaries and/or Operative Reports in paper format that are not created within Cerner. These will need to be scanned into Cerner.

In the Patient Deficiency Analysis window, these scanned documents will be identified by the scanner icon 5.

🖾 Pa	atient Deficiency Analysis		
Task	Visit Deficiency View Help		
ή <mark>α</mark> ,	● 🗭 🖴 🚉 🔍 💷 🖬 🖌 🤇	2 🔹 🕒 🖪	
Patient: CSTPRODHIM, SALLY MRN: 700000379 Birth date: 20-Sep-1 FIN number: 700000002546 Admit date: 1/10/2017 Discharge date: 5/1 Visit status: Incomplete Allocation date: 5/10/2017 Facility: LGH Lione			
	Document	Physician	√ Status Alloc Date
	🖕 Progress Note Generic - 10-Ja	in-2017 10:13 PST	Transcribed
	👍 History and Physical - 10-Jan-3	2017 10:13 PST	Transcribed
	🖕 Consult Note Generic - 10-Jan	-2017 10:13 PST	Transcribed
	Discharge Summary - 10-Jan-2	2017 17:13 PST	Anticipated
		CERNER, CERNER	Dictate/Create 11/30/2017

If the paper document was not signed by the provider and/or is in a "Dictated No Read" state, we will apply a signature annotation to the scanned document and assign a deficiency to the provider to sign the document.



1 Select the scanned document to apply the signature annotation to.

Select the provider's name from the **Personnel Quick Pick** list or search for the provider by clicking **Provider Selection** in the right hand pane.

Task Visit Definitions View Heln		
★ 2 節 品 品 ※ ※ ※ ● ■ ● ■ ●		Tracijing ID:
Patient: CSTPR0DHIM, SALLY MRN: 700000379 Birth date: 20.5ep 1951 Ser: Fenade TH number: 70000000246 Admit date: 1/10/2017 Datehauge date: 5/10/2017 Patient type: Virid statu: Incomplete Adjucation date: 5/10/2017 Facility: CBI Union State Hospital	Inguiliert	D
Openane Openane Openane Openane Program Transmoted Transmoted Difference 10 Jane 2017 10 10 PC1 Transmoted Consult Tomeric 10 Jane 2017 10 10 PC1 Transmoted Difference 10 Jane 2017 10 10 PC1 CENERIA CENERIA Docent/Cene 11/202017 Difference 10 Jane 2017 10 20 PC1 CENERIA CENERIA Docent/Cene 11/202017 Conder Code 2017 10 PC1 Difference 10 Jane 2017 10 20 PC1 Comp TestBill, General/Holder Physicen, HC Predig 14Nor-2017		R Watut H Connect And Uclose Connect Verseni gal agit March Uclose Connect Verseni gal agit Connect Connect Verseni gal agit Connect Connect Verseni gal agit Connect Connect
Lions Gate Hospital HISTORY AND PHYSICIAL I는 수수 취 Pop 여기 속 독표- 이 스 승 과 당당 다 회 및 명종	CSTPRODHIM, Sally MRN: 700000379	Arguinn Remore Soland Remore Remore Remore Remore
Result Type History and Physical Tursteady 19J January 2017 10:13 PST Result Mis- History and Physical Performed by: Document, Scamed Gener on Menday, 52 October 2017 14:52 POT Encounter Info. Profilminary Report * This documents has an image		



2 Click **Add** in the Personnel section of the Deficiencies pane.

The provider is associated with the document and their name will appear under the Physician column.

Deficiencies
Add Auto Update Delete
Personnel guick pick:
CERNER, CERNER Attending Provider Mytropan, France Pharmacist Plisvca, Boco, MD HIM Physician Plisvcb, Stuart, MD Admitting Physician Plisvcc, Trevor, MD HIM Physician
Deficient personnel:
Smith, John Michael
Personnel: Update date/time in PDT:
Add ×/××/××××
Ann <u>extica</u>
Remove
Show:
Complete* V Pending
V In progress V Expected
Unassigned
"As completed orders are not shown, filter only applies to documents.
Submit Revert

3 To add a signature annotation, click on the provider's name and move the cursor to the where the provider's signature is required on the scanned document and click the image (plus sign) to apply the annotation.

Patient Deficiency Analysis			
Task Visit Deficiency View Help			
🙀 🕀 📴 🖴 🚉 🗉 🖻 🛒 🖉 🌳 👘 🔛 🗐	1		
Patient: CSTPRUDHIM, SALLY MRN: 70000037	B Birth date: 20-Sep-1951 Sex: Feir		
FIN number: 700000002546 Admit date: 1/10	72017 Discharge date: 5/10/2017 Patient t	ype: Inpatient	
Visit status: Incomplete Allocation date:	5/10/2017 Facility: LGH Lions Gate Hospital		
Document Physi	cian ∇ Status Alloc Date		
Progress Note Generic - 10-Jan-2017 10:13 PST	Transcribed		
History and Physical - 10-Jan-2017 10:13 PS1 Smith	I ranscribed		
Consult Note Generic - 10-Jan-2017 10:13 PST	Transcribed		
🗏 📋 Discharge Summary - 10-Jan-2017 17:13 PST	Anticipated		
L CERM	IER, CERNER Dictate/Create 11/30/2017		
/ Order Type Physician	Status Allocation Date		
acebutoloi - 01-Mar-2017 07:03 PS1			
L Cosign TestHIM,	GeneralMedicine-Physician, MD Pending 14-Nov-2017		
	V		▲ [.
Demonstration	Class Could Island Michael		- Alter
Requested	sign: Smith, John Michael		
			Pagei
Lione Cate Heenitel		CETDRODUIM Cally	
Lions Gate Hospitar		CSTPRODHIW, Sally	>
		MRN: 700000379	>
HISTORY AND P	HYSICIAL		
			-
(+ + + + + Page _ 1 of 1 € € €	1- 3 0 色 み % 隊 田- 副 略 19 🤗		Pa

- 4 Click the Submit button submit to submit the changes and complete the deficiency assignment. The signature annotation updates to a status of Pending Signature. The document will be sent to the provider's Sign folder in their Message Center for authentication.
- 5 Once the provider has authenticated the document, the signature line is placed in the area where the signature annotation was applied.

Scanned Documents That Do Not Require a Signature

Scanned documents that do not require a signature will appear with the status of Transcribed.

- 1. Right click on the deficiency.
- 2. Click Authenticate Document



Activity 1.3 - Updating the Status of a Deficiency

Once deficiencies are assigned to a provider, they will appear in the provider's Message Centre. After the provider completes the deficiency documents through direct entry, front/back end transcription (FESR/BESR) or traditional transcription, the system will automatically update the result status until completed.

Screenshot of provider's Message Centre with assigned deficiencies

Task Edit View Patient Chart Lir	nks Inbox Help									
🖂 Message Centre 🎍 Patient List 🌇 Lea	arringLIVE 💡 🕅 CareConnect	C PHSA PACS	Q VCH and PHC	PACS 🔃 MUSE 🔃 FormFast WFI						
Sit 🔒 PM Conversation = 🖓 Comm	unicate + 👔 Medical Record R	equest PDocum	ents 🖷 Scheduli	ng Appointment Book 📾 Discern Reporting Portal						
Patient Health Education Materials	Policies and Guidelines 😭 UpT	Oute								
									Report a Name	- 0
Manager Carter									The second second	A Dania das se
message Centre									ayrendeen Orma	i i o nini dan ay
Inbox Summary 8	Deficient Documents X									
Indux Provies Pools	Sommunicate -	n 📓 Message Jo	umal C. Forward	Only 📴 Select Patient 🗮 Select All						
	Create Date 17	Due Date	Location	Patient Information	Patient Name	Status	Subject	Update Date		
Display: Last 90 Days 💌 🔤 🚹	23-Nov-2017 11:43:25 PST		LGH 3W	Admit Date: 13-Jan-2017 Discharge Date: 16-Jan-2017	CSTPRODHIM, CASPERDEMO	Pending	Discharge Summary	23-Nov-2017 11:43:25 PST		
- Inbox Items (135)	23-Nov-2017 11:43:25 PST		LGH 3W	Admit Date: 13-Jan-2017 Discharge Date: 16-Jan-2017	CSTPRODHEM, CASPERDEMO	Pending	Balloon Aortic Valvuloplasty	23-Nov-2017 11:43:25 PST		
 Documents (10/21) 	23-Nov-2017 11:43:25 PST		LGH 3W	Admit Date: 13-Jan-2017 Discharge Date: 16-Jan-2017	CSTPRODHIM, CASPERDEMO	Pending	Bronchoscopy	23-Nov-2017 11:43:25 PST		
Sign (9/16)										
Review (1/5)										
 Messages (2/2) 										
General Messages (2/2)										
Coving Orders (123/123)				- 9						
congr onnen (con con)										
- Work Door 0										
Saved Documents										
Deficient Documents (1/3)										
Page according										
 Notifications 										
Sent Berns										
Notify Receipts										
- need a										

In the cases where the system either doesn't automatically update the status of an existing



deficient document and/or a paper document is provided by the provider, the status of the deficiency will need to be updated manually.

From the Patient Deficiency Analysis window, search for the patient using the Patient Search button *i*, and select the patient's encounter from the Patient Search window. Click **OK**.

BC PHN:	VIP	Deceased	Alerts	BC PHN	MRN	Name		DOB	Age	Gender	Addres	a .	Address (2)	City	Posta
	Ø			9878216037	700001770	CSTPRODHIN	I, WILMADEMO	26-Jan-1984	33 Years	Female	987 SI	DE STREET		VANCOUVER	ESD
MBN:															
700001770															
Last Name:	Ŀ														
First Name:	E														
DOR															
na fra france															
Gender:															
Postal/Zip Code:												_			
Anu Phone Number	Faci	Ry	Enc	ounter #	Visit #	c Type	Med Service	Unit/Clin	ic	Room	Bed	Est Arrival Da	e Reg Dat	e	Disc *
any i none manoe.	S L	GH Lions Gal	e 700	0000015611	7000000	patient	Hematology	LGH 3w		309	01A		11/28/2	0177:45 AM	
Encounter H	3 1	GH Lions Gal	e 700	0000012223		o Dutpatient	Geriatric Medicin	e LGH En	doscopy	Procedure 1	01		10/18/2	017 10:06 AM	10/
	- Sta	GH PF Lab	700	0000012214	122	11 Dutpatient	Respiralogy	LGH PF	Lab				10/18/2	017 9.43 AM	10/
17-5 H	191	GH Lions Gal	e 700	0000011217	70000-31127	9 Inpatient	General Surgery	LGH 6w	r	607	03		10/2/20	17 9.16 AM	10/
YIDK HC	ຟຼາ	GH Lions Gal	e 700	0000002713	700000000272	9 Inpatient	zzInternal Medic	ine LGHEC	C	224	01		1/19/20	17 12:07 PM	1/1
	3 L	GH Lions Gal	e 700	0000002712	700000000272	18 Inpatient	Emergency	LGH AS	с.	ASC	02		1/19/20	17 12:05 PM	1/1 =
Historical MRN:	30	GH Evergree	n 700	0000002711	700000000272	27 Inpatient	Residential	EGH ES	3	E 308	01		1/19/20	17 12:03 PM	1/1
	30	GH Evergree	n 700	0000002710	700000000272	16 Inpatient	Residential	EGH ES	2	E208	01		1/19/20	1712:00 PM	1/1
	316	GH Evergree	n 700	0000002709	700000000272	5 Inpatient	Residential	EGH EN	2	E254	01		1/19/20	17 11:58 AM	1/1
Search Reset	316	GH Evergree	n 700	0000002708	700000000272	4 Inpatient	Residential	EGH EN	1	E152	04		1/19/20	17 11:54 AM	1/1
	3	GH Lions Gal	e 700	0000002707	700000000272	3 Inpatient	Neonatology	LGH 4E		420	01		1/19/20	17 11:50 AM	1/1
	3	GH Lions Gal	e 700	000002706	700000000272	2 Inpatient	ZZENT	zzLGH 3	P0	306	02		1/19/20	17 11:39 AM	1/1
	3	GH Lions Gal	e 700	0000002705	700000000272	1 Inpatient	Dermatology	LGH 2E		218	02		1/19/28	17 11:37 AM	1/1 .

2 Click on the Status of the deficiency and update accordingly.

You will be required to click on "white space" in order for the **Submit** button to appear as not dithered. Click **Submit**.



Activity 1.4 – Deleting a Deficiency

Only delete a deficiency if it was created on the wrong patient or entered in error. The system does not allow you to delete a document with a Completed status.

From the Patient Deficiency Analysis window, search for the patient using the Patient Search button *i*, and select the patient's encounter from the Patient Search window. Click **OK**.

Patient Search															2
C PHN:	VIP	Deceased	Alerts	BC PHN	MBN	Name		DOB	Age	Gender	Addres	\$	Address (2)	City	Pos
	£			9878216037	700001770	CSTPRODHIN	1, WILMADEMO	26-Jan-1984	33 Years	Female	987 SI	DE STREET		VANCOUVER	E80
RN:															
00001770															
st Name:	-														
t Name:															
R:	-														
ак/жанка Пробек															
ider:															
- tal/Zip Code:	•						m								
y Phone Number:	Faci	ity	Enc	ounter #	Visit #	Enc Type	Med Service	Unit/Clini	ic F	loom	Bed	Est Arrival Da	te Reg Da	te	Dis
	 L	GH Lions Gat	e 700	0000015611	70000001561	Inpatient	Hemanogy	LGH 3W	3	09	01A		11/28/2	2017 7:45 AM	
counter #:	4 L	GH Lions Gat	e 700	0000012223	700000001229	0 Outpatient	Medicine	e LGH Enc	loscopy P	Procedure 1	01		10/18/2	2017 10:06 AM	10,
	J.	GH PF Lab	700	0000012214	700000001228	Outpatie	espirology	LGH PF	Lab				10/18/2	2017 9:43 AM	10.
. 	1 Sin Carlor	GH Lions Gat	e 700	0000011217	700000001127	3 Inpatient	deneral Surgery	LGH 6W	6	07	03		10/2/20)17 9:16 AM	10
**.	ᆀ	GH Lions Gat	e 700	0000002713	70000000272	9 Inpatient	zzInternal Medicir	ne LGH ECO	2 2	24	01		1/19/20	017 12:07 PM	17
	델	GH Lions Gat	e 700	0000002712	700000000272	B Inpatient	Emergency	LGH ASC	C A	SC	02		1/19/20)17 12:05 PM	17
orical MRN:	델	GH Evergree	n 700	0000002711	700000000272	7 Inpatient	Residential	EGH ES:	3 E	308	01		1/19/20	17 12:03 PM	17
] 왜 E	GH Evergree	n 700	0000002710	70000000272	6 Inpatient	Residential	EGH ES2	2 E	208	01		1/19/20	017 12:00 PM	17
	1 SILE	GH Evergree	n 700	0000002709	70000000272	5 Inpatient	Residential	EGH EN:	2 E	254	01		1/19/20	017 11:58 AM	17
Search Reset	Jay e	GH Evergree	n 700	0000002708	700000000272	1 Inpatient	Residential	EGH EN	1 E	152	04		1/19/20)17 11:54 AM	17
	⊴ ∥∟	GH Lions Gat	e 700	0000002707	700000000272	B Inpatient	Neonatology	LGH 4E	4	20	01		1/19/20	017 11:50 AM	17
	1 3 1 L	GH Lions Gat	e 700	0000002706	70000000272	2 Inpatient	zzENT	zzLGH 3	PO 3	06	02		1/19/20	017 11:39 AM	17
	1 31 1	GH Lions Gat	e 700	0000002705	70000000272	Inpatient	Dermatology	LGH 2E	2	18	02		1/19/20	017 11:37 AM	1/1
	1														

2 Click on the deficiency and click the **Delete** button

29 Patient Deficiency Analysis	
Tak Viat Deficiency View Help 14、今日日本政治 回社 II ② 今 参加 18 章	Tracking ID:
Peierc STRINDENM, WEBADINE MIN. 70001770 Bith dade: 25-jun; 1984. See Franke FIR sunder: 7000020111277 Admit dade: 10/7/2017 Discharge date: 10/7/2017 Peierc Hyse Inputient Van Admit Incompletes Admication date: 10/7/2017 Feakly: Life Lines date Inputient	
/ Openent Projekov State Alke Ose 0 Openent State Alke Ose 0 Openent State Alke Ose	H (Mai ut) H - Defences Add. Ake Update Percent gas cick Percent gas cick Percent gas cick Testure. Kenager genored fill defence percent gas cick
	Periognet Update date/tige in PDT:
NexeN type: Discharge Sommany Result date: Montpy 120-Citation 110 42 PDT Result date: Articipated Result date: Discharge Sommany Performed by: Smith.John Kitaele in Thursday, 30-Nevember 2017 19.42 PST Encounter Infor	Complete " Pending Pin progress Pending Pin progress Pending Pin straigeed Macconcelled actes are not shown, lifter only applies to documents.
* Preliminary Report *	Submit Revert



0 9 3

Activity 1.5 – Viewing a Deficiency History

To view a detailed listing of historical activity performed on any document, you will need to "lift the skirt" at the bottom of the Patient Deficiency Analysis window. This will reveal the **Action List**.

- 1 After selecting the patient and the appropriate encounter in the Patient Deficiency Analysis window, the document will display in the bottom pane as a "placeholder" document. Highlight the document you wish to view the history for by clicking on it.
- To display the **Action List**, hover your mouse under the scroll bar at the bottom of the screen until your cursor changes to a double-sided arrow $\stackrel{+}{=}$.

Click and drag the double-sided arrow upwards and you will see the Action List.

	Tracking ID:
Patient: CSTPHIDDHM, MLMADCH0 MITN: 200001770 Birth date: 25-Jan: 1994 Sinc: Frankle HM mather: 7000000111171 Adval date: 10/2/2017 Discharge date: 10/2/2017 Patient type: Inguistent Vari alture: Encomplete All-Acciann date: 10/2/2017 Facility: EDI: Linux Gate Hogaliand	D .
Z Discharge State Ale Date 2 Discharge/States/2017/01/21/01 Ale Date Discharge/States/2017/01/21/01 Ale Date 2 Discharge/States/2017/01/21/01 State Ale Date Discharge/States/2017/01/21/01 State Ale Date 3 Discharge/States/2017/01/21/01 State Ale Date Ale Date Ale Date 3 Discharge/States/2017/01/21/01 State Ale Date Ale Date Ale Date 3 Discharge/States/2017/01/21/01 State Ale Date Ale Date Ale Date 3 Discharge/States/2017/01/21/01 State Ale Date Ale Date Ale Date 3 Discharge/States/2017/01/21/01 State Conducted Ling/2007 Ale Date 4 Mittery and Physical - 62.0d 2017/02/25 PD Proc.State.10 Conducted Ling/2007 4 Mittery and Physical - 62.0d 2017/02/25 PD Proc.State.10 Conducted Ling/2007 4 Mittery and Physical - 62.0d 2017/02/25 PD Proc.State.10 Conducted Ling/2007	H Vet det art Image: Herican set of the set o
Result type: Discharge Summary	The conductors are not shown. Iller only applies to documents.
Tall 19 9 99921 We SWARDS Ketos List Action Deformed Date Action Status Comment Procey Personnel Requested By Respected Date Request Comment Perform Sinh, John Michael 20 New-2027 11:03 PST Completed Peon, Sylva Polso-2027 11:03 PST Completed Peon, Sylva Polso-2027 11:03 PST Completed Peon, Sylva Polso-2027 11:03 PST Polson Sinh, John Michael 20 New-2027 11:03 PST Completed Peon, Sylva Polson-2027 11:03 PST Polson Sinh, John Michael Polson-2027 11:03 PST Completed Peon, Sylva Polson-2027 11:03 PST Polson Sinh, John Michael Polson-2027 11:03 PST Completed Peon, Sylva Polson-2027 11:03 PST Polson Sinh, John Michael Polson-2027 11:03 PST Completed Peon, Sylva Polson-2027 11:03 PST Polson Sinh, John Michael Polson-2027 11:03 PST Completed Peon Sinha Polson-2027 11:03 PST Polson Sinha Polson	

The user that created the deficiency will appear under the Requested by column.

Activity 1.6 – Adding Notes

1 To add a note to a deficiency, select the document you wish you add a note to and click the Note icon .

Patient Deficiency Analysis ask Visit Deficiency View Help o	🗟 🖪		
Patient: CSTPRODHIM, WILMADEMO FIN number: 7000000011217 Visit status: Incomplete	MRN: 700001770 Admit date: 10/2/2017 Allocation date: 10/2/2017	Birth date: 26-Jan-1984 Discharge date: 10/2/2017 Facility: LGH Lions Gate Hospita	Sex: Female Patient type: Inpatient I
A Document	Physician	Status Alloc Date	
 Discharge Summary - 02-Oct-2017 11 Urology Progression Note - 02-Oct-2017 	:52 PDT Smith, John Micha 13:53 PDT Poon, Christina Irer	Anticipated el Dictate/Create 11/30/2017 Anticipated ne Dictate/Create 11/30/2017	

2 The Note View Form will appear.

Type the contents of the note in the right hand pane under **Contents**.

Click the Save 🖬 and Exit 🗐 buttons.

The Note View Form will display the date and time the note was entered in the left pane.





The Note icon will appear beside the patient information.

2 Print Deficiency Analysis	04
ine tote phoney into the phone into the second se	Tracting ID:
Paint (STINDERR, VERMOND) MEN TREATE TR nade: RECENTING For Ande: RECENTING Hand das HUL/2010 Excluse das HUL/2010 Forder Specification Hand das Several das Anton Hand HUL/2010 Forder Specification	
[::::::::::::::::::::::::::::::::::::	H - Contract - P Denomination - P Denomination - P Personality - P Per
Pandage Journage Journage Pandage Journage Journage Pandage Journage Jo	Changed Solonite are not shown. Bering agains to documents. Solonit Beringt
This is an anticipated document.	



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ACTIVITY 2 – Physician Deficiency Analysis

Learning Objectives

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

1

- How to Search for Deficiencies by Provider
- How to Update/Change a Provider
- How to Add a Note
 - How to Add a Physician Hold

Activity 2.1 – Getting Started

From the Citrix StoreFront, click on the Physician Deficiency Analysis

2 To set your view preferences click **View**, **Options**.



3 Ensure that your View and Settings tabs are set-up as shown here. Click OK when finished.

🔡 Options 💽	🔛 Options 💽
View Settings Sorting Debugging Advanced Colors	View Settings Sorting Debugging Advanced Colors
☑ Display document status	Personnel Lookup Defaults Image: Second state Image: Second state <td< th=""></td<>
Pull List Report Options	🔘 By alias
Print visit hold reasons on pull list	Physician Tag Colors
Print highlighted charts only	C Terminal Dinit Order
	Retrieve for: V MRN FIN number
	Default Deficiency Status
	Dictate/Create
OK Cancel	OK Cancel

Activity 2.2 – How to Search for Deficiencies by Provider

In the Physician Deficiency Analysis window, search for the provider by typing their last name into the Physician search box (highlighted yellow).

Use the magnifying glass is for a more detailed provider search.

ysician: (by name)		Facility: LGH Lions Gate Hospital	•									
As of	thys Hold											
siency Filters												
Al Ages * Deficient visite Definquent vis	All document statuses Pending Transcription Dictate/Create Pending Signature	All orders		Ibdominal Paracentesis Ibdominal Ultrasound		2 2 2	Allergy Immunology Con Allergy Immunology Prog Anesthesia Record	suit pess Note	 Anesthesiology Progress Note Baloon Aortic Valvuloplasty Brainstem Electrical Response 	Broncho Cardiac 0 Cardia T	scopy Catheterization Diagnostic est or Study	Cardiology Consult Cardiology Progress Note Cardiology Progress Note Cardiopulmonary Stress Test
Delinquent del +	- I charg og hade	e										
is: 0												
tote hold M	RN Fin Nhr	Nama	Facility	Alex Di	(internet)	Chart Loc	Tracking ID		Attend Phere	Direch Dt	Pal Tune	
					1.92							

2 If there is more than one provider with the same name, use the position to determine the correct provider.

Select the provider and click OK.

1

Provider Selection						
Last name:		First name:		1	Suffic	Fauch
chima						• Search
Title:		Alias:			Alias type:	New Provider
	•					- Preview
Usemame:						Class
						Ciea
Limit by group	No data filtering					
					and the second sec	171114
 Link by organization 	Y Pileton Edit	agreen House, som Electroca	adography carac, con	1 Electroephalogra	apry care, PEN caucaloy, care chanonalapy care,	Earl wound asionly nume
Limit by position	S No data fiker					
Limit by relationship	😵 No data filter					
_						
View physicians only						
Varne Aliases	Services Position	10 E	Organizations	Usemame		
Smith John Michael MSP #=07188	Physics	n - Surgeon	EGH Evergreen H.			
				•		

3 Select the main hospital as the **Facility** from the drop-down menu.

k Physician Visit View Help					
1.11111111111111111111111111111111111					
Physician: (by name) Taking Light Long Gate Hospital As of 105201 Phys Hold					
eficiency Filters					
Al Age Age Age Age Age Al document statues Deficient visit Pending Transcription Al document types Deficient Deficient Deficient Deficient Deficient Age Al document type Deficient All	Abdominal Paracenteris Abdominal Utrascund	Alegy Immunology Consult Alegy Immunology Progress Note Alegy Immunology Progress Note Anesthesia Record	Anesthesiology Progress Note Balloon Aortic Vahuloplasty Balant Electrical Response	≥ Bronchoscopy ≥ Cardiac Catheterization Diagnostic ≥ Cardio Test or Study	Cardiology Consult Cardiology Progress Note Cardiopulmonary Stress Test
iste: 1 of 2					
note hold MRN Fin Nbr Name	Facility Alloc Dt Age	Chart Loc Tracking ID	Attend Phys D	sch Dt Pat Type	
700000379 700000002546 CSTPRODHIM, SALLY	LGH Lions Gate Hospital 10-May-2017 208		10	Hay-2017 Inpatient	
7000001770 700000011217 CSTPRODHIM, WILMADEMO	LGH Lions Gate Hospital 02-0ct-2017 59	Plisvex, Stuart, MD	0.	Oct-2017 Inpatient	



4 Select your search parameters under **Deficiency Filters**.

It is best to keep all 3 Deficiency Filters selected. If you change the search parameters at any time, make sure you click the **As Of** button As of 10.52.01 to refresh.

- · · ·							P-
Task Physician Visit View Help							
●がゆ ●がつ●画語 □ ↓	2 🛛						
Physician: (by name) Smith, John Michael	Facility LGH Lions Gate Hospital						
As of 10:52:01 Phys Hold							
Deficiency Filters							
All Ages All document statures Deficient visits Deficient visits Deficient visits Deficient visits Deficient visits	All orders All document types	Abdominal Paracentesis Abdominal Ultracound	✓ Allergy Immunology Consult ✓ Allergy Immunology Progress Note ✓ Anesthesia Record	 Anesthesiology Progress Note Balloon Aortic Valvuloplasty Brainstem Electrical Response 	 Branchoscopy Cardiac Catheterization Diagnostic Cardio Test or Study 	Cardiology Consult Cardiology Progress Note Cardiology Progress Test	

5 A listing of the patient records with deficiencies that the provider has outstanding at the selected facility will display in the bottom pane.

Double click on the specific patient to open it and view the details.

Physician Visit View	Help												
10 🏔 👌 🗊	9. 🖽 💷 🔛 🕻	2 😑 🖻											
sician: (by name)		* Facility											
John Michael		LGH Lions Gate Hospital	•										
Phys Hol	d												
scy Filters													
l Ages 🔹 🔺 🖬 All do	cumerik statuses 🔲 Al	orders	v				Allergy Immunology	Consult	Anesthesiology Progress Note	Bronchos	ору	Cardiology Consult	
elicient visits	ng Transcription V All	document types	Abdominal P	² aracentesis			Allergy Immunology	Progress Note	Balloon Aortic Valvuloplasty	Cardiac C	atheterization Diagnostic	Cardiology Progress Note	
spended vi: Pend	ng Signature		Modominal C	Jisasound			Anesthesia Hecord		 Bransem Electrical Hesponse 	✓ Cardo Fe	at or study	Cardopumonary seess Test	
elinquent del +		**											
of 2													
1.11	C 10		5 m	11.5	4	0	7 15 10		10 IN	0:10	0.17		
hold MBN	Fin Nbr	Name ESTREDONEM SALLY	Facility	Alloc Dt	Age	Chart Loc	Tracking ID		Attend Phys	Disch Dt	Pat Type		
hold MRN 700000379	Fin Nbr 700000002546 7000000011217	Name CSTPRODHIM, SALLY CSTPRODHIM, WILMADEMD	Facility LGH Lions Gate Hospitel	Alloc Dt 10-May-2017 02-0:d-2017	Age 208 59	Chart Loc	Tracking ID	Players Shart MD	Attend Phys	Disch Dt 10-May-2017 02-0rd-2017	Pat Type Inputient		
hold MBN 700000379 700001770	Fin Nbr 70000002546 7000000011217	Name CSTPRODHIM, SALLY CSTPRODHIM, WILMADEMO	Facility LGH Lions Gate Hospital LGH Lions Gate Hospital	Aloc Dt 10-May-2017 02-0 ct-2017	Age 208 59	Chart Loc	Tracking ID	Plisycx, Stuart, MD	Attend Phys	Disch Dt 10-May-2017 02-Oct-2017	Pat Type Inpatient Inpatient		
hold MBN 700000379 200001770	Fin Nbr 700000002545 7000000011217	Name ESTPRODHIM, SALLY ESTPRODHIM, WILMADEMO	Facility LGH Lone Gate Hospite LGH Lione Gate Hospit	Aloc Dt 10-May-2017 02-0et-2017	Age 208 59	Chart Loc	Tracking ID	Pliovex, Stuart, MD	Attend Phys	Disch Dt 10-May-2017 02-Oct-2017	Pat Type Inpolient Inpolient		
hold MRN 700000329 700001770	Fin Nbr 700000002546 7000000011217	Name ESTPRODHIM, SALLY ESTPRODHIM, WILMADEMD	Facility LGH Lons Gate Hospital LGH Lions Gate Hospit	Aloc Dt 10-May-2017 02-Oct-2017	Age 208 59	Chart Loc	Tracking ID	Plievex, Stuart, MD	Attend Phys	Disch Dt 10.May-2017 02-0ct-2017	Pat Type Inputient Inputient		
hold MRN 700000179 1700001770	Fin Nbr 700000002545 7000000011217	Name CSTPRODHIM, SALLY CSTPRODHIM, WILMADEMO	Facility COH Lone Gate Hospite LGH Lions Gate Hospite	Alloc Dt 10-May-2017 02-Oct-2017	Age 208 59	Chart Loc	Tracking ID	Plavex, Stuart, MD	Attend Phys	Disch Dt 10-May-2017 02-0ct-2017	Pat Type Inputient Inputient		
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hold MRN 700000379	Fin Nbr 200000002545 2000000011217	None ESTERODHIM, SALLY ESTERODHIM, WILMADEMO	Faciliy LGH Lions Gale Hospit LGH Lions Gale Hospit	Aloc Dt 10 May 2017 02-0ei-2017	Age 208 59	Chart Loc	Tracking ID	Plisvex, Stuart, MD	Attend Phys	Disch Dt 19.May-2017 02-Dox-2017	Pat Type Inpolient Inpolient		

6 The deficiency will open in the Patient Deficiency Analysis tool, along with other deficiencies on this patient for the same visit.

Chart Deficiencies for CSTPRODHIM, VILMADEMO		
/ 2 Dourset Particle 2017 11 52 PUT Antegrade Data	Authenticate Set alloc	dt View History
C Saith-John Michael Dicate/Deade 30kov-2017	Deliciencies	
	Add Auto Up Personnel guick pick:	date Dolete
Order Type (Physician Status Aloc Date	 Plavex, Stuart, MD Admiting P Poon, Christina Irene HIM Physi Smith, John Michael HIM Physi TestUser, ManagerSupervisorH 	nyiician ician cian IIM
	Deficient personnel:	
Result type: Discharge Summary Result date: Monday, 92-October 2017 11:52 PDT	Add Concorrect Add	poin POI:
Aresult status. Anachered Result stie. Discharge Summary Performed by Snith. John Michael on Thursday. 30-November-2017 11:52 PST Encounter info. 70000001 1271, Cell Lons Gale, Ingelient, 62-Oct-2017 Encounter info.	Show Completed Pe	inding apected
* Preliminary Report *	Unassigned	
This is an anticipated document.	documents.	wen, later only applies to
	This physician) All physicians
	Submit Revent	Close

Activity 2.3 – How to Update/Change a Provider

This activity can also be done in the Patient Deficiency Analysis module.

1 Once you have identified the patient and opened up the Patient Deficiency Analysis window, select the deficient document you wish to update.

Ensure that the **Show** parameters are set so that all deficiency statuses are being viewed.

	4	Authenticate	Set alloc dt	View History
E Smith, John Michael Distate/Create 30Nov-2017	De	eliciencies		
	16	Add	Auto Update	Deloto
Oder Type Pryncise Status Jatos Date	Per Pie Pie Se Te	esonnel guick pick: lisvox, Stuat, MD (/ oon, Christina Irene mith, John Michael (estUser, ManagerSi	Admitting Physician I HIM Physician I HIM Physician upervisor-HIM	
	Dg	eficient personnel:		
Result type: Dschatge Summary Result date: Moday, 02-October-2017 11.52 PDT Result date: Moday, 02-October-2017 11.52 PDT Result date: Dschatge Summary Performed by: Smith, John Michael on Thuraday, 30-Nevember-2017 11.52 PST Encounter info: 700000011271, Oct Loop Sale, Ippatent, 02-Oct-2017	Pet Arr	Add mongtation:	late date/time in PC	1: •
* Preliminary Report *	Ĩ	Unassigned	C CAPECIED	
This is an anticipated document.	do	s contents.	are not shown. 6be	2 opplies to
		This physician	O All phy	siciens
		Submit	Revert	Close

2 To update the status of the deficiency, click on the Status of the deficiency and update accordingly.

You will be required to click on "white space" in order for the **Submit** button to appear as not dithered. Click **Submit**.

Patient Deficiency Analysis	- 0 -
Tax Vato Declaracy View Holp m ← 0 BD a about 1 → 1 → 1 → 0 → 0 → 10 B ®	Tracking ID:
Palinet: CSTPT0011HL/LITETINY MIN: 700002949 Birlh date: 03 Mag-1966 Sec: Fenade FN marker: 70000001122 Addwilder: 02:04:2017 Discharge date: 103.04:2017 Palinet type: Ingulated Vnr at Nate: Encomplete Addwilder: 03:04:2017 Filt Filt Historia Bart Hengala	
J Dataset Janc Data 2 Conclusiony Construit - 21 New 2007 11 24 PE3 1 Tail/CL Resider, MO Completed 3 2 Discharge Summay - 02 Oct 2017 12-55 PD 1 Schwick Janc Mark 201 New 2017 12-57 PD 1 Schwick Janc Mark 201 New 2017 12-57 PD 1 2 2 Discharge Summay - 02 Oct 2017 12-57 PD 1 Schwick Janc Mark 201 New 2017 12-57 PD 1 Schwick Janc Mark 201 New 2017 12-57 PD 1 2 2 Discharge Summay - 02 Oct 2017 12-57 PD 1 Schwick Mark 201 New 2017 12-57 PD 1 Schwick Mark 201 New 2017 12-57 PD 1 3 2 Discharge Summay - 03 Oct 2017 10:50 PD 1 Astricipated 1 Schwick Mark 201 New 2017 1 3 2 Discharge Summay - 03 Oct 2017 10:50 PD 1 Schwick Mark 201 New 2017 1 Schwick Mark 201 New 2017 1 3 2 Discharge Summay - 03 Oct 2017 10:50 PD 1 Schwick Mark 201 New 2017 1 Schwick Mark 201 New 2017 1 3 3 Discharge Summay - 03 Oct 2017 10:50 PD 1 Schwick Mark 201 New 2017 1 Schwick Mark 201 New 2017 1 4 0.00x Tail New 201 New 201 New 201 New 2017 1 Schwick 201 New 201	H Valit tot 1 >> H Policiencies Auss Update Deline Process Status Mars Update Deline Process Status Deline Deline Schood Marset Deline Deline Schood Marset Deline Deline Schood Marset Deline Deline Schood Marset Deline Deline
	Anglation Remove the show
Result tape: Discharge Summary Result atta: Tureladg, 9:0-004ee-01 10:00 POT Result atta: Anticipade Result atta: Discharge Summary Performed by: Smith.john Michael on Luesday, 28-November-2017 15:52 PST Encounter info 700000011252; LOI Luino state, Inpatient, 92-Oct-2017	Comparer Prinding Prinding
* Preliminary Report * This is an anticipated document.	Submit Reveal

3 To assign the deficiency to a different provider, click on the provider in the top left pane to highlight and click the Remove button Remove in the right pane.



		_
/ Document Pftysician Status Alloc Date	A theorieste Catalog de Misu History	-
Discharge Summary - 02-0ct-2017 11:52 PDT Anticipated	Territorie Jerako di Territoriy	
Smith, John Minkael Dictate/Cinate 30Nov/2017	Deficiencies	
	Add Auto Update Delete Personnel guick pick: Plance, Shaat, MD (Admitting Physician Poor, Christina Isreel (HIM Physician Static Mode Mode Static Physician Static Add Mode Static Physician Static Physician Static Physician Plance Physician P	
Urder Type Prhysician Status (Aldo Date	TestUser, ManagerSupervisor-HIM	
	Dgficient personnet Smith John Michael	a
In the second	Barrows Inc. 10 A	
Peart type: Discharge Summary months/ Result data: Monday 32-Colorbe-2011 11:52 PDT Result status: Anticipated Result status: Discharge Summary Performed by: Streth, John Michael on Thursday, 30-November-2017 11:52 PST Encounter infor 70000001 1217; DG1 Luon Sale, Inpatient, 02-Col-2017	Parrove Process Completed Process Completed Process	
1 Preliminant Penert 1	17 Unavoimed	
This is an anticipated document.	A compared odes are not shown, filter only applies to documents. This physician Al physicians Submit Revent Dose	

4 Enter the name of the new provider in the **Deficient Personnel** box (or use the magnifying glass to search).

Click Add to assign this new provider to the deficiency.



5 When a provider is removed and a new provider is added to the document, the status changes to 'Pending Transcription' leading to these changes not updating into the PowerChart Message Centre.

You will need to manually change the document status to **Dictate/Create**, which will update the document with the new provider in PowerChart Message Centre.

Physician	∇ Status	, 1	Physician	∇ Status
	Anticipated	_		Anticipated
Smith, John Michael, MD	Pending Transcription	\rightarrow	Smith, John Michael, MD	Dictate/Create

6 The new provider will then be assigned to the deficiency.

Click **Submit** to save any changes.

/ Dozneret Prysion Statu Alc Date		Authenticate Set alloc dt View History
L Buth, Kevin L Pending		Deficiencies
Dider [Type Physican [Status [Aloc Date	** **	Add. Auto Update Delete Personel guick pick Personel guick pick Person, Stauk (ND Admitting Physician Peor, Distritu Biere (HM Physician Senih, John Michael (HM Physician TextUre, Managet) spervisor/HM
		Deficient personnet Buch Kevin Lesle
Result type: Discharge Summary: Result type: Mindary, 02.0 ctober 2017 11.52 PDT Result titu: Anticipated Result titu: Discharge Summary Performed by: Swith, John Michael on Hundary, 30-November 2017, 11.52 PST Encounter info: 700000011277, LOR Liuns Gale, Inpatient, 82-0ct-2017 * Preliminary Report *		Percopet Updet dar/tipe in PDT Argsdoor Percov Sov Orgeted Percov Competence Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Percov Perc
This is an anticipated document.		documents.
	<	Inspryscan All physicans Submit Reveit Close

Activity 2.4 – How to Add a Note

There are two types of notes: Physician Notes and Visit Notes.

Physician Note



2 Type the content of the note on the right side of the Note View Form.

Click the Save 📕 and Exit icon 🗐 .



Notes for Smith, John Michael	Contents:	
	Test physician note.	
Permanent note		
Print on deficiency slip		

³ A Physician Note symbol D will appear to the right of the provider's name.

Task Physician Visit View Help	
≗⇒¢ è≥⇒⊙∮≣⊞ ⊞	
 * Physician: (by name) Smith, John Michael, MD As of 6:17:11 AM Phys Hold 	 ★ Facility: LGH Lions Gate Hospital

Visit Note

1 To add a Visit Note, select the deficiency from the bottom pane that you would like to add a note to, and click **View/Add Visit's Notes** icon **P**.



2 Type the content of the note on the right side of the Note View Form.

D Not	e View Form					×				
CSTPF	ODHIM, SALL'	Y Notes fo	r Admit E	Contents: Test visit note,						
Per Prin Author	ion deficiency	sip	ymb	ol 匪 wi	II appe	ear in	the N	ote	colu	m
Per Prin Author Author Physician ask Physician	interiency Analys in Visit View Market View	slip tes	ymb	ol 📴 wi	ll appe	ear in	the N	ote	colu	m
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Per Physician I active Physician I Smith, John M As of 14:52 Deficiency Fit Definate Definate Definate Definate	indirent note : on deficiency etclency Analysis in Visit View 을 높 은 한 y name) chael etclency Analysis chael visits () View Physe H etclency Analysis () View Physe H etclency (slip te sy Help Male told	ymb © Øvussi viption ure	Ol Wi P Colty Lick Lions Gate Hospit Al document types	II appe	ear in	the N	ote	colu	
Per Privacian Author Physician Smith, John M As of 14:52 Physician Smith, John M As of 14:52 Deficiency Fit Deficiency Fit Deficiency Fit Suspence Suspen	Interest Note con deficiency efficiency Analyzy in Visit View interest	slip tee S Help I I III told	ymb	Ol Wi • Colly: LGH Lone Gate Hospit Al document types *	II appe	ear in	IPeracenteris Uther Dt	ote		

Activity 2.5 – How to Add a Physician Hold

A Physician Hold is used in those instances where you want to stop the aging of a deficiency because the physician is unavailable.

From the Physician Deficiency Analysis window, select the Physician Hold icon PhysHold. 1 ≗\$\$\$P\$ ₽\$(0) ₽ \$ # !!! 🖾 P 🖻 🗈 * Physician: (by name) Smith, John Michael 0 102 LGH Lions Gate Hospital 🔹 As of 14:52:47 Phys Hold... Deficiency Filters Al Ages
 Al Ages
 Al I document statuses
 Periong Transcription
 Delinquent vis
 Delinquent vis
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 Delinquent del
 ✓ Allergy Immunology Consult
 Allergy Immunology Progress Note
 Anesthesia Record Anesthesiology Progress Note
 Balloon Aotic Valvuloplasty
 Brainstern Electrical Response Bronchoscopy
 Cardiac Catheterization Diagnostic
 Cardio Test or Study All document types Abdominal Paracentesis
 Abdominal Ultrasound Visits: 1 of 2 note hold Fin Nbr Tracking ID MBN Name Facility Alloc Dt Age Chart Loo Attend Ph Pat Type 70000379 700001770 02-0 ct-2017 7000000011217 CSTPRODHIM, WILMADEMO LGH Lions Gate Hospital 59 Plisvex, Stuart, MD 02-Oct-2017 Inpati



2 The Holds window will appear.

Select the:

- Reason: Vacation / Leave of Absence / Other
- Start Date: Start date of leave
 - End Date: Only set an end date if you know it

Click Create	an	d click Close	Close		
Holds				×	
Smith, John Michael		Physician Hold Info			
		* Reason: 🛛 🛛 🗸 🗛	cation	•	←
		* Start date: 18-	Dec-2017		←──
		End date: 05-	Jan-2018		←──
				Retrieve	
Hold Reason	Start Date		End Date		
Holds for Smith, John Michael	-	Create	Delete	Close	

If there is a Physician Hold, the Hold icon will appear beside the Physician box.



ACTIVITY 3 – Deficiency Letters / Provider Suspension

Learning Objectives

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

- Identify Reports Available for HIM Deficiency Management Module
- Run the Deficiency Reports through the Discern Reporting Portal
- Place a Provider on Suspension
 - Remove a Provider on Suspension

Activity 3.1 – Identify Reports Available for HIM Deficiency Management Module

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

2 To view the HIM Deficiency Management reports, select **HIM Deficiency Mgmt** under **Categories** in the left pane **Filters**.

Your screen should look similar to this.

1

Reporting Portal		
😂 Cerner		
Reporting Portal		
Filters	All Reports (9) My Favorites (0)	
	Report Name	▼ Categories
Source	Cosign Orders - Inpatient	HIM Deficiency Mgmt
✓ Categories	Deficiency by Physician Detail (Cerner)	HIM Deficiency Mgmt
HIM Chart Tracking/PIR (0/5)	Delinquent Document Detail	HIM Deficiency Mgmt
HIM Deficiency Mgmt (9/9)	Delinquent Document Summary	HIM Deficiency Mgmt
HIM Release of Information (0/11)	RM-Deficiency by Phys Specialty Detailed	HIM Deficiency Mgmt
	RM-Deficiency by Phys Specialty Summary	HIM Deficiency Mgmt

3 The 2 most common reports you will run are:

- RM-Deficiency by Phys Specialty Detailed
- RM-Deficiency by Phys Specialty Summary

To mark any of the reports as **My Favorites**, click on the star under the **Favorite** column.

Activity 3.2 – Run the Deficiency Report

As per the Record Completion Standard Operating Procedure, there are two reports and three Deficiency Letters which are run on a weekly basis.

The three deficiency letters are:

- Incomplete Record Notice
 - Sent to all providers with the deficiencies for patients discharged 15 21 days ago.
- Final Notice
 - Sent to all providers with the deficiency for patients discharged 22 28 days ago.
- Suspension Letter



 \circ Sent to all providers with deficiencies for patients discharged >/= 29 days ago.

Note: All three Deficiency Letters will be run a weekly basis. Physicians will receive the most severe letter.

There are two reports that you can run:

1. RM-Deficiency by Physician Specialty Detailed Report

• This report provides a *detailed listing* of the each providers' deficient records

		RI	I-Deficiency I	oy Physician Spec	ialty Detailed Report		
		L	etter Type:	Incomplete Record Notic	е		
		F	acility:	Lions Gate Hospital			
		5	Suspended Physician	s: Excluded			
Submitted By: Poon, Sylv	ia	5	Specialty(ies):	All Specialties			
Submitted On: 05 DEC 2	17 16:00	5	Status(es):	Dictate/Create, Pending	Signature, Pending Transcription		
Submitted On. 05-DEC-2	J17 10.20	C	Oocument Type(s):	HIM Deficient Document	Types		
Patient Name	MRN	Encounter #	Discharge Date	Deficiency	Status	Deficiency Age	Medical Service

2. <u>RM-Deficiency by Physician Specialty Summary Report</u>

- o This report provides a *summary* of the number of deficiencies for each provider
- Can produce a report to be sent to the Department Heads by selecting either Final Notice or Suspension Letter) and selecting the check box for Department Head Distribution.

Physician Name	Specialty	# of Deficiencies	# of Discharges	Oldest Age of Deficiency	Hold Reason	Date Suspended
Submitted On: 05-DEC-2017 16:29	Document Type(s):	HIM Deficient Docu	ment Types	nding Transcription		
Submitted By: Poon, Sylvia	Specialty(ies):	All Specialties				
	Suspended Physicians:	Excluded				
	Letter Type: Facility:	Lions Gate Hospital	NOTICE			
	KWI-Deficiency by		Secially Sum	ппагу кероп		
	RM-Deficiency by	Physician Sp	pecialty Sum	mary Report		

RM-Deficiency by Physician Specialty Detailed Report

1 To run the **RM-Deficiency by Physician Specialty Detailed** report, select this report in the Discern Reporting Portal.

Click Run Report

- 2 The Discern Prompt window will appear, select the following:
 - Output: MINE
 - Letter Type: Incomplete Record Notice / Final Notice / Suspension Letter
 - Health Organization: Choose your Health Organization
 - Facility: Choose main hospital as the facility

- Include Suspended Physicians:
- If you want to include providers who are already suspended click this checkbox
- Medical Specialty(ies): All Medical Specialties
- Page Break on Medical Specialty: Click this checkbox if you want the report to sort by medical specialty
- Status(es): Include Dictate/Create
- Document Type(s): Include All Clinical Documents

Click the **Execute** button

Discern	Prompt: BC_ALL_HIM_DEFIC_PHYS_DET	LYT:DBA	- 🗆 ×
Output to File/Printer/MINE	MINE 🗸	2	
*Letter Type	Incomplete Record Notice	¥	
*Health Organization	Vancouver Coastal Health Authority	*	
*Facility	Lions Gate Hospital	~	
Include Suspended Physicians			
*Medical Specialty(ies)	All Medical Specialties Acupuncture Administrative Medicine Addlescent Medicine <		
Page Break on Medical Specialty			
*Status(es)	Dictate/Create Pending Signature Pending Transcription		
*Document Type(s)	All Clinical Documents Discharge Summary Operative Report		
Return to prompts on close of ou	Execute Cancel		

3 From this report, you can email the appropriate HIM Deficiency Notice/Letter via Outlook to the provider's with deficiencies.

RM-Deficiency by Physician Specialty Summary Report

1 To run the **RM-Deficiency by Physician Specialty Summary** report, select this report in the Discern Reporting Portal.

Click Run Report

- 2 The Discern Prompt window will appear, select the following:
 - Output: MINE
 - Letter Type: Incomplete Record Notice / Final Notice / Suspension Letter
 - Health Organization: Choose your Health Organization



- Facility: Choose main hospital as the facility
- Include Suspended Physicians: If you want to include providers who are already suspended click this checkbox
- Department Head Distribution: Check this box for Final Notice and Suspension Letter
- Page Break on Medical Specialty: Click this checkbox if you want the report to sort by
 - medical specialty
- Status(es): Include Dictate/Create
- **Document Type(s)**: Include All Clinical Documents

Click the **Execute** button

Discern F	Prompt: BC_ALL_HIM_DEFIC_PHYS_SUM_LYT:DBA	- 🗆 ×
Output to File/Printer/MINE	MINE 🗸	
*Letter Type	Final Notice 🗸	
*Health Organization	Vancouver Coastal Health Authority 🗸	
*Facility	Lions Gate Hospital	
Include Suspended Physicians		
Department Head Distribution	v	
*Medical Specialty(ies)	All Medical Specialties Acupuncture Administrative Medicine Advisement Medicine	
*Status(es)		
*Document Type(s)	All Clinical Documents Discharge Summary Operative Report	
Return to prompts on close of o Enter or select the printer or file name	Execute Cancel utput ie to send this report to.	

3 From this report, you can email the appropriate HIM Deficiency Notice/Letter via Outlook to the provider's with deficiencies.

Activity 3.3 – Placing a Provider on Suspension

From the Citrix StoreFront, click the Physician Deficiency Analysis icon

2 Select the provider under **Physician** and choose the main hospital from the **Facility** drop-down list.

🚇 🗎 💕) 🖻 🚔 🕀 🗊 🛛	1 🖽 💷 🤮	P 🖻 🗈									
 Physician Smith, John As of 11: 	n: (by name) n Michael 128:40 Phys Hol	1	Facility: [LGH Lions Gate Hospital									
Deficiency F	Filters											
All Ag Defici	ient visits guent vis	ng Transcription	All orders All document types	✓ ✓ Abdominal ✓ Abdominal	Paracentesis Ultrasound		✓ Alle ✓ Alle ✓ An	ergy Immunology Cr ergy Immunology Pr resthesia Record	insult ogress Note	 Anesthesiology Progress Note Balloon Aortic Valvuloplasty Brainstem Electrical Response 	I Bronchos I Cardiac C I Cardio Te	copy atheterization E st or Study
Suspe	ended vi: V Pendir guent del V	ng Signature		_								
Visits: 1 of 2	ended vis quent del ▼ 2	ng Signature	m									
Visits: 1 of 2	2 nold MRN	Fin Nbr	m Name	Facility	Alloc Dt	Age Chart	Loc	Tracking ID		Attend Phys	Disch Dt	Pat Type
Visits: 1 of 2	2 nold MRN 100000379	Fin Nbr 70000002546	III Name CSTPRODHIM, SALLY	Facility LGH Lions Gate Hospital	Alloc Dt 10-May-2017	Age Chart	Loc	Tracking ID		Attend Phys	Disch Dt 10-May 2017	Pat Type Inpatient
Visits: 1 of 2	quent del + ✓ Pendir quent del + ✓ Pendir 2 MBN 100000379 1000001770 100001770	Fin Nbr 7000000012545 7000000011217	III Name CSTPRODHIM, SALLY CSTPRODHIM, WILMADEMO	Facility LGH Lions Gale Hospital LGH Lions Gale Hospital	Alloc Dt 10-May-2017 02-Dct-2017	Age Chait 208 59	Loc	Tracking ID	Piisvex, Stuart, MD	Attend Phys	Disch Dt 10-May-2017 02-Oct-2017	Pat Type Inpatient Inpatient
Visite: 1 of 2	2 nold MEN 7000001770	Fin Nbr 700000002546 7000000011217	III Name CSTPRODHIM, SALLY CSTPRODHIM, WILMADEMO	Facility LGH Lions Gate Hospital LGH Lions Gate Hospital	Alloc Dt 10May-2017 02-Oct-2017	Age Chart 208 59	Loc	Tracking ID	Plisvox, Stuart, MD	Attend Pirys	Disch Dt 10/Msy/2017 02-0ct-2017	Pet Type Inpatient Inpatient
Visits: 1 of 2	ended vit querit del + 2 nold MRN 70000379 700001770	Fin Nbr 700000002545 700000011217	III Name CSTPRODHIM, SALLY CSTPRODHIM, WILMADEMD	Facility LGH Lions Gale Hospital LGH Lions Gale Hospital	Alloc Dt 10May-2017 02-0ct-2017	Age Chart 208 59	Loc	Tracking ID	Plisvox, Stuart, MD	Attend Phys	Disch Dt 10 May 2017 02 Oct-2017	Pet Type Inpatient Inpatient

³ Select the Suspension Log icon $findsymbol{H}$.

· · · · · · · · · · · · · · · · · · ·	
Task Physician Visit View Help	
월 10 월 12	2 P 2 1
* Physician: (by name)	* Facility:
Smith, John Michael, MD	LGH Lions Gate Hospital 🗸 🗸
As of 12:15:53 PM Phys Hold	

- 4 The Provider Suspension Log will appear
 - Select the main hospital(s) from the Facility drop down.
 - For those hospitals where the system has been built out as more than one facility, you will be required to suspend the provider's privileges at all applicable facilities (i.e. Lion's Gate Hospital and HOpe Center).
 - Add a Start Date.
 - Enter any applicable comments to the free text section under **Comments**.



Create/Update Suspension Facility: LGH Lions Gate Hospital Start Date: USDec:2017 Select all active suspensions Suggension details: Facility Start Date End Date Days Suspended Last updated by	Provider name: Smith, John Michael		Eacili LGH	Lions Gate Hospital		-
Select all active suspensions Sugerssion details:	Create/Update Suspension	n				
GH Lions Gate Hospital Test Commental "Start Date: End Date "Start Date: End Date "Select all active suspensions Susgension details: Facility Start Date End Date Date	Facility:		Com	and the second se		
Creat Creat Creat Select all active suspensions Suspension details: Facility Start Date End Date Days Suspended Last updated by	Start Date: 03-Dec-2017	End Date	Test	Comments)	
Select all active suspensions Suspension details: Facility Start Date End Date Days Suspended Last updated by						g
Select all active suspensions usgension details: Focility Start Date End Date Days Suspended Last updated by						
Facility Start Date End Date Days Suspended Last updated by	Select all active suspens	ions				
	Select all active suspension details:	ions				
	Select all active suspensi Suspension details: Facility	ions Start Date	End Date	Days Suspended	Last updated by	
	Select all active suspens Susgension details: Facility	ions Start Date	End Date	Days Suspended	Last updated by	
	Select all active suspensi Suspension details: Facility	ions Start Date	End Date	Days Suspended	Last updated by	
	Select all active suspensi Suspension details: Facility	ions Start Date	End Date	Days Suspended	Last updated by	
۶	Select all active suspension details: Facility	ions Start Date	End Date	Days Suspended	Last updated by	
< III Delete CI	Select all active suspens Suspension detais: Facility	ions Start Date	End Date	Days Suspended	Last updated by	Delete

5 Select the **Create** button Create

The **Suspension details** will populate in the bottom pane.

Click the Close button 💷	Close					
Him Provider Suspension Log						×
Provider name: Smith, John Michael	<u>F</u> acility LGH '	y Lions Gate Hospital			•	
Create/Update Suspension Facility:	Comm	ents:				
*Start Date: *Start Date: **				Class	Crust	
Select all active suspensions Susgension details:					cione	
Facility Start Date En	d Date	Days Suspended	Last updated t Poon, Sulvia	y Te	est Comments	
<			1 001, 0, VII			-
				Delet	e Close	
Ready						1

⁶ The Suspension Log icon 🗰 will appear next to the Physician box.

A Suspension Alert will also appear in the Register Patient Conversation when the provider is selected as the admitting physician during the registration process.

Physician Deficiency Analysis							
Task Physician Visit View H	lelp						
≜≒¢ 6≒0 0	1 🖽 💷 🖾	2 🖻					
* Physician: (by name) Smith. John Michael							
As of 11:46:29 Phys Hold							
Deficiency Filters							
✓ All document statuses ○ Deficient visits ○ Definient visits ○ Dictate/Create							
Delinquent del -	signature	III					
Visits: 1 of 2	Visits: 1 of 2						
note hold MRN	Fin Nbr	Name	Facility				
100000379	700000002546	CSTPRODHIM, SALLY	LGH Lions Ga				
🗊 🖑 700001770	7000000011217	CSTPRODHIM, WILMADEMO	LGH Lions Ga				

Note: A provider's suspension can be overridden at the point of Registration.

A report titled **Suspended Physician Overrides** is available in the Discern Reporting Portal and provides a listing of these activities for monitoring by HIM Supervisors/Managers.

All HIM staff can run the **RM-Physician Suspension Report** to get a listing of all providers that are currently suspended.

Activity 3.4 – Removing Provider from Suspension

1

From the Citrix StoreFront, click the Physician Deficiency Analysis icon

2 Select the provider under **Physician** and choose the main hospital from the **Facility** drop-down list.



Cardiac Catheterization
Disch Dt Pat Type
10-May-2017 Inpatient
U2-Uct-2017 Inpatient

³ Select the Suspension Log icon $mathbb{H}$.

Physician Deficiency Analysis	
Task Physician Visit View Help	
🚇 ≒ ()) 🗛 🤚 🗐 🖾 🖽 🖾	P 😑 🗉
* Physician: (by name)	* Facility:
Smith, John Michael 🔍 🕅 🖑	LGH Lions Gate Hospital 🔹
As of 11:28:45 Phys Hold	

- 4 The Provider Suspension Log will appear.
 - Select the active suspension from the bottom pane.
 - Enter an End Date.

Click Update	Update
Click Close	Close

100						- • •
Provider name: Smith, John Michael		<u>Facilit</u> LGH	y Lions Gate Hospital		•]
Create/Update Suspension						
Facility:		Comm	ients:			
LGH Lions Gate Hospital		Test	Comments			*
- <u>S</u> tart Date: 03-Dec-2017	4-Dec-2017	•			Clear	Update
Select all active suspensions						
Suspension details: Eacility	- Cian Trave	Endillate			- L h.u.	
Sus <u>p</u> ension details: Facility Facility Cons Gate Hospital	Start Date 03-Dec-2017	End Date	Days Suspended 3	Last update Poon, Sylvia	d by Test i	Comments
Suspension details: Facilitu Primons Gate Hospital	Otar Date 03-Dec-2017	End Date	Uays Suspended 3	Last update Poon, Sylvia	Test	Comments
Suspension details: Facility Primons Gate Hospital	O3-Dec-2017	End Date	Uays Suspended 3	L ast update Poon, Sylvia	Test I	Comments

The Suspension icon icon will disappear from the Physician Deficiency Analysis and the Suspension Alert will no longer appear in the Register Patient Conversation.

Note: The Suspension Log only allows you to select a Start Date and an End Date – it does not allow you to choose a time.

Therefore, if a provider is placed AND removed from suspension on the same day, you will need to enter the End Date the same as the Start Date which would be the <u>previous date</u>. This will ensure that the Suspension Alerts will not appear in the Register Patient Conversation (if provider is selected as an Admitting Physician).



ACTIVITY 4 – Message Centre

Learning Objectives At the end of this activity, you will be able to: Overview / Message Centre Basics Navigating Provider Message Centre for Deficient Documents – refer to Quick Reference Guide (QRG) HIM Refusal Inbox Proxy Authorization – Taking / Removing Proxy Manage Documents in the HIM Refusal Inbox Manage Orders in the HIM Refusal Inbox

Activity 4.1 – Overview / Message Centre Basics

The Message Centre is a component of Cerner Millennium used for managing workflow in the inpatient or outpatient setting. It allows for the routing of information electronically amongst providers. The Message Centre enables providers to review or sign results, documents and prescription requests, as well as work with phone and other messages.

For HIM, we will primarily use the Message Centre to notify the providers of their Deficient Documents through the Deficiency Analysis modules, manage any documents that have been "refused" by providers (HIM Refusal Inbox) and administratively sign-off documents for providers who have left the organization.

Message Centre Basics

1

From the Citrix StoreFront, click on the PowerChart icon

2 The Message Centre tab will open.



Inbox Summary

Message Centre notifications are divided into categories or folders. The number adjacent to the category name indicates the number of Inbox items in that category that are unread. Tabs at the top of the Summary pane allow you to select which Inbox you would like to work with, for example your own inbox or a Proxy inbox.

It is important to note that you must choose the date range from the Display list in order to see all the messages from a certain time period.



Summary Pane / Workpane

The summary pane lists the individual Inbox items (messages, documents and so forth) contained in the folders in the Inbox Summary. Double-clicking an Inbox item in the Summary Pane opens the workspace for that item.



Documents X										
🏪 Communicate 🗸 📸 Open 📓 Message Journal 🖄 Sign All 😹 Review All 🔀 Forward Only 🦕 Select Patient 🖏 Select All										
Patient Name	From	Notification C	Subject	Author	Description	Create Da /	Status	Туре	Due Date	Assigned
HIMTEST, MM	TestHIM, Cardi	Assign to anot	Operative Report	TestHIM, Cardi	Operative Report	09-Nov-2017 1	Opened	FORWARDED SI		WHC, HIM-Ref
CSTPRODHIM	PEM, HIM-Ref	Assign to anot	Discharge Su	TestHIM, Gen	Anticipated	04-Dec-2017	Pending	FORWARDED	FORWARDED	

Activity 4.2 – HIM Refusal Inbox

Providers have the option to sign or refuse documentation from their Message Centre. HIM Management and HIM Clerk IV – Record Completion & Quality Checks are "Proxied" access to the HIM Refusal Inbox.

When Providers refuse documentation from their Message Centre to the HIM Refusal Inbox, they are required to provide a reason. The drop-down reasons for refusing documentation include:

- Assign to another MD
- Other (See Comments)
- Report Already Exists (See Comments)
- Wrong Order
- Wrong Patient

HIM Clerk IV's are to investigate where documentation belongs, who the documentation should be sent to or in-error documentation when necessary.

Note: Documents that have been transcribed using BESR (Back-End Speech Recognition) should be forwarded to the Transcription Refusal Inbox.

In order to access the HIM Refusal Inbox, you must Take Proxy for this Inbox.

Proxy Authorization – Taking Proxy

Granting proxy authorization enables another provider/user within Cerner to access your Inbox and work with it as your proxy. Additionally, you may be able to take proxy from another provider/user within Cerner and access their Inbox as their proxy.

Each site will have an **HIM Refusal Inbox** for providers to refuse documents to in the cases where they received a document to sign/review that was sent to them in error. HIM is responsible for managing these refusal Inboxes:

- LGH, HIM Refusal Inbox
- SGH, HIM Refusal Inbox

Of note, Transcription Services will have their own Refusal Inbox and they will be responsible for managing any and all *transcribed* documents. Providers will be instructed to refuse documents to one of the HIM Refusal Inboxes and then HIM will triage the refused documents and forward the transcription related refusals to the 'Transcription, Refusal Inbox'.

In order to view what documents have been refused to these HIM Refusal Inboxes, designated HIM staff will have the authority to take or "steal" proxy authorization, in other words, access another inbox within Cerner.

1	From the Inbox Summary,	, select the Proxies tab and click on the Manage button	Manage
	Message Centre		
	Inbox Summary 📮		
	Inbex Proxie Pools		
	Proxy:		
	Display:		

2 Click the Received tab located at the bottom left hand corner of the window.

i Given	
Proxies Given by Me	Proxies Taken from Me
User Begin Date End Date	New User Begin Date End Date
During Add During	Duelle Add Demonst
Vestern Page Remove	Vesario Pioni Kemove
Gr Received	
	OK Cerrel
	UN LEILE

- 3 From the right hand pane entitled Proxies taken by Me, click the Add button
- 4 From the User list select the user that you want to take proxy from. Use the magnifying glass to search for the user.



Provies Received by Me							_
			Proxies Taken by Me				
User Begin Date End Date			User Begin Date End Date				
Details	Add Remove		Details Add	Remove			
Gines Received							
Contra Co							_
New Taken Proxy							
User		Avalable Rems		Gra	inted items		
Additional Users							
				Grant All ->>			
				Geant All ->> Geant ->			
				Grant All ->> Grant ->			
Begin Date				Grant All ->> Grant -> <- Rayoke			
Begin Date 06-Dec-2017	1 EF (*) 1323			Grant All ->> Grant -> <- Ravola <<- Ravola			
Begin Date (09-Dec-2017) End Date)题(*) 133			Grant All ->> Grant -> <- Ravoke <<- Ravoke All			
Begin Date 08-Dec-2017 End Date 08-Jan-2018) 版 (*) 1333) 版 (*) 1333	18		Grant All >>> Grant >> < - Revolue <<- Revolue All			
Begin Date 08-Dec-2017 End Date 08-Jan-2018)臣(* [193)臣(* [193	38		Grant All ->> Grant -> <- Revolue <<- Revolue All			
Begin Date (8th Osc-2017) End Date (8th Jan - 2018))贤(* (183)贤(* (183	18		Grant All ->> Grant -> <- Revolue All			
Begin Date (R-Dec-2017) End Date (RE-Jan-2018))贤。[130]贤。[130	18		Genet All ->> Genet -> <- Revolue <<- Revolue All			
Begin Date (88-Dec-2027) End Date (87-Jan-2028)]85(* 1337]85(* 1337	18 18		Grant All >>> Grant -> < Revolu <<- Revolu All			
Begin Date Bit-Dec-2017 End Date Bit-Jan-2018)贤(* (133)贤(* (133	18		Grant All +>> Genet-> <- Revolu <<- Revolu All		Death Mr	

To search for the HIM Refusal Inbox, enter your facility in the Last Name field and HIM Refusal 5 Inbox in the First Name field.

Click Search and choose the user from the bottom pane. Click OK.

Provider Selection				
Last name:	First name:		Suffix:	Savah
LGH 🤨	HIM Refus	al Inbox		Search
Title:	Alias:		Alias type:	Man Dravid
	•			- Preview
Usemame:	`			
				Liear
E Limit by group	S No data filtering			
Limit by organization	No data filtering			

Organi

(

The Begin Date/Time and an End Date/Time for the proxy will auto fill with 'today's date/time' for a months' time. 6

ОК

Cancel

The Available Items will appear in the middle pane.

Grant All ->> to take all Inbox items. The Inbox Items will populate Select the Grant All button the Granted Items pane.

Accept & Next Click on Accept & Next

No data filtering No data filtering

Service

Limit by position

Limit by relationship View physicians only

raxies Received by Me		Proxies Taken by Me	
User Begin Date End Date		User Begin Date End Date	
Details Add Remove		Details Add Remove	
iven hecentee			
New Taken Proxy	to didde herer	Australiana.	
Ser	Available items	Granted Rems	
dditional llear	- Messages		
utitional oses	- CC Messages		
	Orders		
	- Cosign Orders		
	Documents		
	Sign		
	Work Items	Grant All ->>	
	Deficient Documents	Grant ->	
	Saved Documents	<- Revoke	
-gin Date	Notifications Notify Receipts	c c - Revolve All	
08-Dec-2017 ÷ 1717	Trash	The force print	
nd Date			
38-Jan-2018 😴 🖬 1717			
		Accent & Next	Cancel
		Acception	

7 You will now see the HIM Refusal Inbox in the Proxies Taken by Me pane on the right hand side. Click **OK**.

Configuration Behavior Prefs Manage Pools Manage Proxy FYI Result Subscriptions	
Received	
Proxies Received by Me	Provins Taken by Me
Vale Bejn Die End Die	Protect Later by Not Vor Begin Date End Date PEM, Hild-Refutables: 60-08::2012174:60 PST 00-5ex:2012174:60 PST
Outsils Add Ramove Cover Restrict	Details Add Remove
	OK Cancel

8 A Commit Progress box will appear. Click **OK**.

(



9 From the Proxies tab, you will now see all of the provider's refusals.

Message Centre												
Inbox Summary 🛛	Documents X											
Inbox Proxies Pools	Communicate	• 📾 Open 💥	Message Journal	🖄 Sign All 🐊 Re	riew All 🔯 Forwar	d Only 🖾 Select	Patient The Select	All				
Presva Presva	Patient Name	From	Notification C	Subject	Author	Description	Create Da., /	Status	Туре	Due Date	Assigned	
Direlan i dan	CSTPRODHIM	TestHIM, Cardi	Report Alread	Discharge Su	TestHIM, Cardi	In Progress	19-May-2017	Pending	FORWARDED		PEM, HIM-Ref	
Load All +	HIMTEST, Mai	Testrum, Carol	Assign to anot	Consult Note	Testriim, Carol	Consult Note	13-1404-2017	renaing	FORWARDED		PEM, HIM-Net	
Inbox Items (4)												
Documents (2/2)												
Beview (1/1)												
Orders (Unavailable)												
 Messages (2/2) 												
General Messages (2/2)												
 Work Items (0) 												
Saved Documents												
Reminders												
- Notifications												
Sent Items (Unavailable)												
Trash (Unavailable)												
Notify Receipts												

Proxy Authorization – Removing Proxy Authorizations you have

Taken or Granted

1 To remove an existing proxy authorization, from the Inbox Summary, select the **Proxies** tab and click on the **Manage** button <u>Manage</u>.



- 2 To view all proxies granted by you, click on the **Given** tab on the bottom left hand of the window. To view all proxies taken by you, click on the **Received** tab on the bottom of the left hand window.
- 3 As HIM will most likely only be taking proxy, select the Received tab to show all proxies you have taken.

Select the proxy you wish to remove, click Remove, then OK.

Configuration Behavior Prefs Manage Pools Manage Proxy PYI Result Subscriptions	
Proxies Received by Me	Proxies Taken by Me
User Begin Date End Date	User Begin Date End Date
	PEM, HIM-Refusal Inbox 08-Dec-2017 17:44:00 PST 08-Jan-2018 17:44:00 PST
	•
Details Add Kemove	Details Add Kernove
Gif A Received	
-	OK Cancel

4 A Commit Progress box will appear. Click **OK**.



OK



Once you have taken proxy from the HIM Refusal Inbox, you can now manage the refused documents.

Note: Documents that have been transcribed using BESR (Back-End Speech Recognition) should be forwarded to the Transcription Refusal Inbox.

1 In PowerChart, select the **Message Centre** tab.

Choose the **Proxies** tab in the Inbox Summary and 'Take Proxy' from your health organizations HIM Refusal Inbox:

Name LGH, HIM-Refusal Inbox SGH, HIM-Refusal Inbox



2 Your screen should look similar to this with a listing of Inbox Items under Documents and Orders

Inbox Summary 4	Documents X									
Inbox Proxies Pools	🔓 Communicate 🔹 🚔 Open 🤰	Message Journal	🝸 Sign All लिस	view All 🔐 Forward	d Only 📴 Select	Patient 🗰 Select	All			
Prove: LOH LINE Manage	Patient Name From	Notification C	Subject	Author	Description	Create Da /	Status	Туре	Due Date	Assigned
Manage	CSTPRODHIM, TestHIM, Gener	Wrong Patient	Internal Medici	TestHIM, Gener	Anticipated	21-Jul-2017 13:	Opened	FORWARDED SL		LGH, HIM-Refu
Display: Last 30 Days 👻 📃	CSTPRODHIM, TestHIM, Cardi	Assign to anot	Discharge Sum	TestHIM, Gener	In Progress	18-Sep-2017 15	Opened	FORWARDED SL		LGH, HIM-Refu
	HIMTESTING, TestHIM, Cardi		Allergy Immun	TestHIMTRANS	Allergy Immun	08-Nov-2017 1	Opened	FORWARDED R		LGH, HIM-Refu
Inbox Items (17)	HIMTEST, MM Transcription,	Assign to anot	Family Medicin	TestHIMTRANS	Family Medicin	15-Nov-2017 1	Opened	FORWARDED SL		LGH, HIM-Refu
Documents (8/17)	HIMTEST, MM TestHIM, Cardi	Assign to anot	Consult Note G	TestHIM, Cardi	Consult Note G	15-Nov-2017 1	Opened	FORWARDED R		LGH, HIM-Refu
Sign (8/14)	CSTPRODHIM, Transcription,	Wrong Patient	Cardiac Cathet	TestHIM, Gener	Cardiac Cathet	22-Nov-2017 1	Opened	FORWARDED SL		LGH, HIM-Refu
Review (0/3)	CSTPRODHIM, TestHIM, Gener	Other (See Co	Discharge Sum	TestHIM, Gener	Anticipated	23-Nov-2017 1	Opened	FORWARDED SL		LGH, HIM-Refu
- Orders (8/8)	CSTPRODHIM TestHIM, Cardi	Assign to anot	Discharge Su	TestHIM, Cardi	Anticipated	23-Nov-2017	Pending	FORWARDED		LGH, HIM-Ref.
Cosign Orders (8/8)	CSTPRODHIM TestHIM, Gen	Other (See Co	Discharge Su	TestHIM, Gen	Anticipated	23-Nov-2017	Pending	FORWARDED		LGH, HIM-Ref.
E Mercager (1/2)	PATIENT, SAL LGH, HIM-Ref	Assign to anot	Discharge Su	TestPET, Gene	Discharge Su	23-Nov-2017	Pending	FORWARDED		LGH, HIM-Ref.
General Messages (1/2)	CSTPRODHIM TestHIM, Gen	Assign to anot	Transfer Note	TestUser, Gen	Transfer Note	23-Nov-2017	Pending	FORWARDED		LGH, HIM-Ref.
General Wessages (1/2)	CSTPRODHIM, TestHIM, Gener	Assign to anot	Echo Report	TestHIM, Gener	Echo Report	23-Nov-2017 1	Opened	FORWARDED R		LGH, HIM-Refu
Work Items (2)	CSTPRODHIM, TestHIM, Cardi	Assign to anot	Discharge Sum	TestHIM, Cardi	Anticipated	23-Nov-2017 1	Opened	FORWARDED SL		LGH, HIM-Refu
	CSTPRODHIM TestHIM, Cardi	Assign to anot	Consult Note	TestHIM, Cardi	Anticipated	27-Nov-2017	Pending	FORWARDED		LGH, HIM-Ref.
Notifications	CSTPRODHIM Transcription,	Wrong Order	ED Note Provi	TestHIM, Gen	ED Note Provi	01-Dec-2017	Pending	FORWARDED		LGH, HIM-Ref.
Sent Items	CSTPRODHIM Transcription,	Assign to anot	Consult Note	TestUser, Med	Advance Care	05-Dec-2017	Pending	FORWARDED		LGH, HIM-Ref.
Trash	CSTPRODHIM TestUser, Card	Wrong Encoun	Free Text Note	TestUser, Med	Echo Report	06-Dec-2017	Pending	FORWARDED		LGH, HIM-Ref.
Notify Receipts										

3 To manage the Documents, double-click on one of the messages to review the document that was refused.

The document will appear and look similar to this.

Inbox Pocuments FORWARDED SIGN DOC: CSTPRODHIM, WILMADEMO × Inbox Provide Pools Forward Only @ Print % Select Patient @ & @ Mark Unread Imbox View Imbox Vie	
Inbox Provies Pools 🖉 Groward Only 🔅 Forward Only 🏂 Print 🖕 Select Patient 🎓 🕭 🆓 Mark Unread Inbox View Summary View 📸 🗶 🔯 🎘	
Prove LGH_HM- Manage CSTPRODHIM, WILMADEMO D0526-Jan-1994 MRX/200001770 Code Status: Process: Location(HECC: 2 Agres) years Enc/200000002713 Disease: Enc/TypeInpatient	24; 01
Display: Lat 30 Days Allergies: No Known Allergies Gender:Female PHN9878216037 Dosing Wt: Isolation: Attending:	
Indux Items (18) Coursents (1/1) Sign (1/4) Sign (1/4) Revit (tatis: Anticipated Revit (tatis: Anticipated) Revit (tatis: Anticipated)	
i Artino Pane	a
Additional Comments	
@ Comments OK&C	Close OK & Next

4 To see the Action List associated with this document, "lift the skirt" on top of the Action Pane to reveal the **Action List**. Your screen should now look similar to this.

Documents × FORWARDED SIGN DOC: CSTPRODHIM, WILMADEMO ×												
🏹 Forward Only 冯 Pri	💢 Forward Only 🎯 Print 🕼 Select Patient 🎓 🐥 🏤 Mark Unreal Inbox View Summary View 📸 👔 😹 📡 🔛 🖓 👘 🦉 🖗											
CSTPRODHIM, WI	ILMADEMO	DOB:26-Jan-198 Age:33 years	:4	M	IRN:700001770	Code Statu	s:	Process: Disease	Location:LGH ECC; 224; 01			
Allergies: No Known	Allergies	Gender:Female		Pi	HN:9878216037	Dosing Wt:		Isolation:	Attending:			
Result type: Result date: Result status: Result title: Performed by: Encounter info:	Vesult type: Internal Medicine Consult Vesult date: Thursday, 19-January, 2017 12:07 PST Vesult date: Anticipated Vesult title: Internal Medicine Consult Vesult title: Internal Medicine Consult Parformed by: Test, Hild on Friday, 27J-Uty/2017 13:32 PDT Encounter info: 700000002713, LGH Lions Gate, Inpatient, 19-Jan-2017											
		* Preli	minary Re	port *								
This is an anticipate	d document.								I			
						٨						
Action List												
Performe Reform Test Hill	ed By	Performed Date	Action Status Refused	Comment Wrong Patient	Proxy Personnel	Requested By Test User HIM - Manager/Supervisor	Requested Date	Request Comment				
Sign LGH, HIN	/ /-Refusal Inbox	21-30-2017 13.52 +01	Requested	wrong Patient		Test, HIM	21-Jul-2017 13:32 PDT	Wrong Patient				
Action Pane	_		_	_	_				, ,			
Sign	Refuse Re	ason:		×								
Additional Forward Action:	To: (Limit 5)				萨							
Comments: (Limit 212)												
Comments									Next OK & Close OK & Next			

- ⁵ After reviewing the document and the Action List, you will need to determine why the provider "refused" that particular document. Some of the reasons may be:
 - Assigned to the wrong provider to sign/review.
 - Duplicate report.
 - Wrong patient / document type / encounter.

Note: If the refused document is a duplicate report or on the wrong patient/encounter or wrong document type, refer to Activity 5 – In Erroring of Documents.

6 If the document was assigned to the wrong provider for signature, you will need to determine who the provider should be.

Within PowerChart, click on Chart on the task bar and select Patient Information.



Task Edit View Patient	hart inks Inbox Help						
🔄 Message Centre 🛓 Patien	N tes	nnect 🔃 PHSA PACS 🔍 VCH and PHC PACS 🕄 MUSE					
Exit 🔒 PM Conversation 🤸	Orders	orting Portal 📻 Documents 箇 Scheduling Appointment					
Patient Health Education M	Results Review	UnToDate					
~	Documentation	Selection (
	Patient Information						
Message Centre	Wiednessment						
Inbox Summary	Coding Clinical Summary	ARDED SIGN DOC: CSTPRODHIM, WILMADEMO ×					
Johny Proving Deals	Diagnoses and Problems						
Index Provides	Allergies	nt 🖕 Select Patient 👚 🐥 🍓 Mark Unread 🛛 Inbox V					
Proxy: LGH, HIIv - Ma	Histories	ILMADEMO DOB:26-Jan-1984 Age:33 years					
Display: Last 30 Days 💌	Birth Certificate	Allergies Gender:Female					
Inhov Items (16)	CareConnect						
E Desurrente (7/17)	Clinical Research	Internal Medicine Consult					
Sign (7/14)	ED Summary	Anticipated					
Review (0/3)	Form Browser	Internal Medicine Consult					
Orders (8/8)	Immunizations	700000002713. LGH Lions Gate. Inpatient, 19-					
Cosign Orders (8/8)	Infusion Documentation						
 Messages (1/2) 	MAR Summary	* Preliminary					
General Messages (1,	Ad Hoc Charting	d document.					
Work Items (2)	Chart Accessed By	b					
Saved Documents	Close Charts						
Deficient Documents (2/3)							
Reminders							
Notifications							
Sent Items							
Trash							
Notify Receipts							

7 Select the Relationship Summary tab, which will provide a summary of all staff, including providers, who have established a "relationship" with the patient. This Relationship Summary is helpful in identifying which provider a document should have been assigned to for signature/review.

		-												
TPRODHIM, WIL	MADEMO													
			Age:33 years	Enc:70000	000112									
rgies: No Known A	llergies		Gender:Female	PHN:9878	PHN:9878216037		Dosing	Dosing Wt:			Isolation:			
nu			A Patient Inf											
	+ Add	Demograp	ier Visit La Relationshin Sum	mary										
	🕈 Add	leven and												
Its Review		Lifetime	Relationships 👘 My Relations	hips Only 📝 Active Relation	nships (Only								
umentation	+ Add	Name	Relationship Sta	tus Begin Date End Date	Physicia	n Service								
ent Information		Plisven, H	erb, MD Primary Care Physician Act	we 13-Jan-2017	Emerger	ncy Medicine								
	+ Add													
ng Clinical Summary														
noses and Problems		Sec. 10			0.000	1810								
		Visit Rela	tionships My Relations	hips Only 🛛 Active Relatio	inships (Only								
lie -		Selected	Name	Relationship	Status	Begin Date	End Date	Physician Service	Admit Date	Discharge Date	Fin Number	Medical Service	Facility	Location
			TestUser, Cardiologist-Physician, MD	Covering Provider	Active	28-Nov-2017			28-Nov-2017		700000015611	Hematology	LGH Lions Gate	LGH 3W 309 01/
			Plisvcb, Stuart, MD	Admitting Physician	Active	28-Nov-2017		Emergency Medicine	28-Nov-2017		700000015611	Hematology	LGH Lions Gate	LGH 3W 309 01/
			Plisvcb, Stuart, MD	Attending Provider	Active	28-Nov-2017		Emergency Medicine	28-Nov-2017		700000015611	Hematology	LGH Lions Gate	LGH 3W 309 01/
Certificate			TestUser, MedicalStudent	Education	Active	28-Nov-2017			28-Nov-2017		700000015611	Hematology	LGH Lions Gate	LGH 3W 309 014
			TestUser, Pharmacist-PharmNet, RPh	Pharmacist	Active	28-Nov-2017			28-Nov-2017		7000000015611	Hematology	LGH Lions Gate	LGH 3W 309 014
onnect			TestUser DocumentCorrection-HIM	HIM Document Correction	Active	05-Dec-2017			28-Nov-2017		700000015611	Hematology	LGH Lions Gate	LGH 3W 309 01/
al Research			TestMM Pharmacist-PharmNet2 RPt	Pharmacist	Active	29-Nev-2017			28-Nov-2017		700000015611	Hematology	LGH Lions Gate	LGH 3W 309 014
			Plisyre Noe MD	Consulting Provider	Active	05-Dec-2017		Orthonaedic	28-Nov-2017		700000015611	Hematology	LGH Lions Gate	LGH 3W 309 01/
			TestUser ManagerSupervisor.HIM	HIM Manager Supervisor	Active	05.Dec.2017			28-Nov-2017		700000015611	Hematology	LGH Lions Gate	LGH 3W 309 01
mmary		×	Poon, Sylvia	HIM Manager Supervisor	Active	11-Dec-2017			02-Oct-2017	02-Oct-2017	7000000011217	General Surgery	LGH Lions Gate	LGH 6W 607 03
Browser														
Browser anizations														
n Browser nunizations sion Documentation														
rm Browser munizations usion Documentation														

⁸ Once the correct provider is identified, go back to the Message Centre by clicking on the appropriate PowerChart tab at the bottom of your screen.

Jun					
?)	_Shortcuts	SPOON.PRODBC	PowerChart Orga	CSTPRODHIM, WI	

9 In the Action Pane, click **Refuse** to forward this document to the correct provider to sign/review. Under Reason, select **Assign to another MD.**

Action Pane				
Sign	Refuse	Reason:		
Additional Forward Action: Comments: (Limit 212)	▼ To: (Limit !	5)	Assign to another MD Other (See Comments) Report Already Exists, (See Comments) Wrong Order Wrong Patient	确

Note: It is important to note that once you have selected something from a field with a dropdown menu, that you must click out of that field before using the scroll on the mouse or else the previous field will scroll up and down and your selection may change.

10 Under Additional Forward Action, select Sign or Review.



11 Under To, select the appropriate provider by typing the providers name in the field or doing a search using the binoculars.

-		
lo: Smith, John Michael X	一番	١
(Limit 5)		/

To do a search, click on the binoculars. The Address Book will appear.

Type the provider's name under **Type a name or select from list**. The list of providers will appear in the bottom pane on the left side. Select the appropriate provider and click **Add**. Click **OK**.

Address Book				*	A	ddress Book			
Internal				_		Internal			
Type a name or select from list:		Show nam	ies from			Type a name or select from list:			Show names from
smith, john		Global Ad	Idress Book 👻			smith, john			Global Address Book
🛛 Kan 🖉 🗇 Dist	ribution List					Personnel O Pool O	istribution List		
Right click to add/remove a name in the	personal address book	Send to				Right click to add/remove a name in t	he personal address book		Send to
Name	Position	Name				Name	Position		Name
Smith, John Michsel	Physician - Surgeon					Smith, John Michael	Physician - surgeon		Smith, John Michael
					>				
		Add		111				Add	
								Remove	
Max						More		_	
mere					1				OK General
			OK Cancel						UK Cance

- 12 Enter any free text in the Comments field (i.e. "Document sent to the wrong provider for cosignature.")
 - If you click OK & Close, this will take you back to the Message Centre listing of Inbox Messages
 - If you click OK & Next, this will take you to the next document from the listing

Action Pane	ģ
Sign	
Additional Sign ↓ To: Forward Action: Sign ↓ To: (Link 5) Smith, John Michael × (Additional) (Link 5) Smith, John Michael × (Link 5) Smith, J	
Comments: (Limit 159) Document sent to the wrong provider for co-signature.	
0 Comments	Ne <u>x</u> t OK & <u>C</u> lose OK & <u>N</u> ext



Note: It is important to note that Steps #9 to #12 are **ONLY** for those documents that require a **SIGNATURE**.

In the event that the document that is being refused is a deficient document that needs to be dictated/created by another provider, in other words it is a **Discharge Summary or Operative Report** that is a **Preliminary Report that is in an Anticipated** status, these cannot be forwarded from the HIM Refusal Inbox.

In order to remove these refused documents from the Refusal Inbox, you need to go to the Patient Deficiency Analysis module and **delete** that deficiency and **recreate** the same deficiency to the correct provider with the status of **dictate/create**. See Activity 1.4 Deleting a Deficiency.

Activity 4.4 – Managing Orders in the HIM Refusal Inbox

HIM will be responsible for managing Refused Orders. These can be discontinued, active and future orders, including orders for those who have been discharged.

Providers may refuse orders in the cases where they have instructed a nurse or other member of the staff to place an order on their behalf. The provider will be notified via Message Center that there is an outstanding order that requires their co-signature. The provider chooses not to sign the order while the patient is in house, and then later refuses the order. They will then refuse this order to the HIM Refusal Inbox.

HIM staff will be acting on two types of refused orders:

- 1) Those that have not been resolved/reconciled after 24 hours.
- 2) Those that have not been resolved/reconciled **post-discharge** of a patient.

Refused Orders Greater than 24 Hours Post Order/Create Date

In the Message Centre, select **Proxies** in the Inbox Summary and choose your facility's **HIM Refusal Inbox** if you have already taken proxy for this Inbox. If you have not taken proxy for this Inbox, follow the proxy authorization process for taking proxy.

Select **Orders** from the Inbox Items in the left pane and a listing of refused orders will display in the right pane.

Refer to column **'Create Date'** which has the date and time the order was placed to determine before acting on these refused orders.

lessage Centre														 Full screen 	🛱 Print 👌
inbox Summary 🗧 🕈	Orders X														
nbox Proxies Pools	Sommunicat	e • 💕 Open 💥	Message Journal	Forward Only 🔤 Select Patient	Select All										
	Patient Name	Order/Plan Na	Details	Order Comment	Originator Na	Create Da /	Notification C	Stop Date	Stop Type	Update Date	Status	Order Action	Туре	From	
Manage	CSTPRODREG,	ibuprofen	200 mg, PO, BI		TestMAT, Nurs	15-Nov-2017 0	Other (See Co	27-Nov-2017 1	Physician Stop	15-Nov-2017 0	Opened	Order	REFUSED COSI	PLISVDT, Smith	
lay: Last 30 Days 👻 📃	CSTEICIA, UT	Electrocardiog	*Est. 2017-Sep		TestCST, ICU	15-Nov-2017		05-Sep-2017	Physician Stop	15-Nov-2017	Pending	Order	FORWARDED	Refused, Futur	
	CSTEICIA, UT	XR Chest	2017-Sep-01,		TestCST, ICU	15-Nov-2017		05-Sep-2017	Physician Stop	15-Nov-2017	Pending	Order	FORWARDED	Refused, Futur	
Inbox Items (15)	CSTEICIA, UT	XR Chest	2017-Sep-01,		TestCST, ICU	15-Nov-2017		05-Sep-2017	Physician Stop	15-Nov-2017	Pending	Order	FORWARDED	Refused, Futur	
Documents (7/17)	CSTEICIA, UT	Electrocardiog	*Est. 2017-Sep		TestCST, ICU	15-Nov-2017		07-Sep-2017	Physician Stop	15-Nov-2017	Pending	Order	FORWARDED	Refused, Futur	
Sign (7/14)	CSTSMITH, C	Electrocardiog	16-Nov-2017		TestUser, Nurse	16-Nov-2017	Assign to anot	16-Nov-2017	Physician Stop	16-Nov-2017	Pending	Order	REFUSED COSL	TestORD, Gen	
Review (0/3)	CSTPRODOS,	Notify Treatin	29-Nov-2017		TestOS, Nurse1	29-Nov-2017	Other (See Co	05-Dec-2017	Physician Stop	29-Nov-2017	Pending	Order	REFUSED COSL	TestOS, Gener	
Orden (7.0)	CRUZ-LEARN,	Arterial Blood	Whole Blood,	SPECIAL COLLECTION REQUIRE	TestUser, Res	01-Dec-2017	Wrong Order	17-Nov-2017	Physician Stop	01-Dec-2017	Pending	Discontinue	REFUSED COSI	TestPET, Gene	
Cosign Orders (7/8) Messages (1/2) General Messages (1/2)															
Work Items (2)															
Saved Documents															
Deficient Documents (2/3)															
Keminders															
Notifications															
Sent Items															
Trash															
Notify Receipts															

2 Select one of the refused orders. Review the order for the refusal reason. Check the Order History to see if previous HIM Action. This Order History can be found in the pane under the patient banner bar or can also be found under the **History** tab.

Check the Relationship Summary in Patient Information Tab and Documentation in PowerChart to determine correct provider.

Message Centre				
Inbox Summary	Orders × REFUSED COSIGN ORDERS	CSTPRODREG, MOMMY	×	
Inbox Proxies Pools	Forward only 🛊 🐥 Inbox View !	Summary View	55	
Proxy: LGH, HIV + Manage	CSTPRODREG, MOMMY Allergies: No Known Medication Al	DOB:10-May-199 Age:27 years lergies Gender:Female	0	MRN:700007937 Enc700000013193 PHN:9876487474
Inbox Items (15) Documents (7/17) Sign (7/14)	Original order entered and electronically s Cosignature Required order by PLISVDT, S Pharmacy Department ibuprofen	igned by TestMAT, Nurse-OB mith, MD	1 on 15-Nov-2017 at 08:55	PST.
Review (0/3)	Details Additional Int History of	mments Results		
Orders (7/8) Cosign Orders (7/8) Messages (1/2) General Messages (1/2)	Discontinue 27-Nov-202 Server PST	Discontinue 27-Nov Automatically discontinu	-2017 14:01 PST ed on 27-Nov-2017 at 14:0	. PST due to discharge.
= Work Items (2)		Status Attas	Refere	
Saved Documents Deficient Documents (2/3) Reminders		Order Status Discontin Details	ued Ordered	
- Notifications		Validations Pharmacy Verification		
Sent Items		Pharmacy verified by Uni	known on unknown at	
Trash Notify Receipts		Order 15-Nov-2017 Entered and electronically Cosignature Required ord	08:56 PST / signed by TestMAT, Nurs ler by PLISVDT, Smith, MD	e-OB1 on 15-Nov-2017 at 08:55 PST.
		Status		
		Order Status	Ordered	
		Details	200	
		Dorellait	200	
		Volume dose	T I I I I I I I I I I I I I I I I I I I	
		Volume dose upit	La tak	
		Route of Administration	ERO .	
		Frequency	BID with food	
		PPN	Ma	
		PKN	No	

3 If you can identify the correct provider, forward the order by clicking on the **Forward Only** icon





4 The Forward Only window will appear. Type in the name of the provider in the **To** field or search for the provider using the binoculars.

Free text any applicable comments in the Comments field.

Click OK. The refused order will drop out of the HIM Refusal Inbox

Tolward Only. Ordels. CSTPRODICED, MOMINE	
Additional Sign To: Forward Action: Limit 1) Wells, Neil Jeffery X	
Comments: (Limit 255)	
	Cancel O <u>K</u>

Note: Messages can only be sent to recipients with valid Message Center Access. If you attempt to send a message to a provider who does not have Message Center Access, you will receive this warning box.

lo Chart Access		No Message Center Acces	is	Valid Recipients		Valid Recipients C	urrently out of Office	
	*	Wells, Neil Jeffery	*		*	Recipients	Dates	
	-		-		-			
<	Þ	*	Þ.	4	Þ.	Send Anyovay		

⁵ In the cases, where you are unable to discern which provider to forward the refused order on to, complete a PSLS Report assigning it to the Handler of the patient location as per the SOP.

Once the appropriate measures are taken to resolve the refused order, the order should drop out of the HIM Refusal Inbox.

Refused Orders Post-Discharge

In the Message Centre, select **Proxies** in the Inbox Summary and choose your facility's **HIM Refusal Inbox** if you have already taken proxy for this Inbox. If you have not taken proxy for this Inbox, follow the proxy authorization process for taking proxy.

Select **Orders** from the Inbox Items in the left pane and a listing of refused orders will display in the right pane.

In order to determine if the Refused Order belongs to a discharged Inpatient, click on one of the refused orders.

Orders X (04.14) (04	e Centre													, 🛛 , Full screen	Pont	2 3 m
Communication Communi	Unimary [‡] Orders X															
List 30 Marga Order Name Order Johnson Order Action Star Director Star Director Order Action Type From List 30 Dir Control Director Star Directo	Proxies ools Scommunicate	2 • 💕 Open 💥 Messag	ige Journal 🔀 Fo	orward Only 📴 Select Patient	Select All											
Unit No Winds Open 20 Ex TextX1.10 1540ev2012. Provide 11 <	Patient Name	Order/Plan Na Detail	ails Or	rder Comment	Originator Na	Create Da /	Notification C	Stop Date	Stop Type	Update Date	Status	Order Action	Туре	From		
Lui 20 0 0 1 - 0 Bottau UI. B	CSTPRODREG,	ibuprofen 200 m	mg, PO, BL		TestMAT, Nurs	15-Nov-2017 0	Other (See Co	27-Nov-2017 1	Physician Stop	15-Nov-2017 0	Opened	Order	REFUSED COSL	PLISVDT, Smith		
Internet 132 REGURA UL, X RONAN 2015 Spo 01 TextC17. ULC. 15 Shov 2017 O5 Spo 2017 Physician Stop 15 Nov. 2017 Point Mode Display Endernet futur Refit URG ULG X RONAN X RONAN 2015 Spo 01 TextC17. ULC. 15 Nov. 2017 O5 Spo 2017 Physician Stop 15 Nov. 2017 Point Mod Display	ast 30 Days 👻 CSTEICIA, UT	Electrocardiog *Est. 2	2017-Sep		TestCST, ICU	15-Nov-2017		05-Sep-2017	Physician Stop	15-Nov-2017	Pending	Order	FORWARDED	Refused, Futur		
Internet (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	CSTEICIA, UT	XR Chest 2017-	7-Sep-01,		TestCST, ICU	15-Nov-2017		05-Sep-2017	Physician Stop	15-Nov-2017	Pending	Order	FORWARDED	Refused, Futur		
memo (D,D) RETURA UT. Betracarding. Sta 2017 Sp., - TextS1 (LVL - 15 Mev 2017 - Methor 2017 - Ponding Sta 15 Mev 2017 - Ponding Sta	Items (15) CSTEICIA, UT	XR Chest 2017-	7-Sep-01,		TestCST, ICU	15-Nov-2017		05-Sep-2017	Physician Stop	15-Nov-2017	Pending	Order	FORWARDED	Refused, Futur		
m0/L0_ GSTMMUK_C. Beteroarding. 16-Mev-2017	nents (7/17) CSTEICIA, UT	Electrocardiog *Est. 2	2017-Sep		TestCST, ICU	15-Nov-2017		07-Sep-2017	Physician Stop	15-Nov-2017	Pending	Order	FORWARDED	Refused, Futur		
STREAD VIEWS (1/2) CSTREADONS, Needly Treatine. 29 Mev-2017. Test/Streat 29 Mev-2017. Under (See Co. 05 Dec-2017. Physician Stop 29 Mev-2017. Pending Dider BETUSED COSE. Test/951, Gener. STREAD VIEWS (1/2) CSTREADONS, Meetly Treatine. 29 Mev-2017. Test/Mer, Res. 01 Dec-2017. Wrong Order 17 Mev-2017. Physician Stop 01 Dec-2017. Pending Dider BETUSED COSE. Test/951, Gener. STREAD VIEWS (1/2) CSTREADONS, Meetly Treatine. 29 Mev-2017. Test/Mer, Res. 01 Dec-2017. Wrong Order 17 Mev-2017. Physician Stop 01 Dec-2017. Pending Dider BETUSED COSE. Test/951, Gener. STREAD VIEWS (1/2) CSTREADONS, Meetly Treatine. 29 Mev-2017. Test/Mer, Res. 01 Dec-2017. Wrong Order 17 Mev-2017. Physician Stop 01 Dec-2017. Pending Dider BETUSED COSE. Test/951, Gener. Test/951 VIEWS (1/2) CSTREADONS, VIEWS (1/2) V	n (7/14) CSTSMITH, C	Electrocardiog 16-No	lov-2017		TestUser, Nurse	16-Nov-2017	Assign to anot	16-Nov-2017	Physician Stop	16-Nov-2017	Pending	Order	REFUSED COSL	TestORD, Gen		
CAUL-LIARN_ Arterial Blood_ Whole Blood_ SPECIAL COLLECTION NEQUIRE_ Test/Jsec. Res. 0.1-Dec.2017_ Wrong Order 17.4Nov-2017_ Physician Stop 0.1-Dec.2017_ Pending Discontinue REFUSED COSL_ Test/PET, Gene. Comments Comments atlons ans Receipt	new (0/3) CSTPRODOS,	Notify Treatin 29-No	lov-2017		TestOS, Nurse1	29-Nov-2017	Other (See Co	05-Dec-2017	Physician Stop	29-Nov-2017	Pending	Order	REFUSED COSL	TestOS, Gener		
ys 1/2 ner Massage (1/2) Items (2) Coursets ext Bocumets (2/3) der attions arts Receipti	(7/8) CRUZ-LEARN	Arterial Blood Whole	de Blood, SPI	ECIAL COLLECTION REQUIRE	TestUser, Res	01-Dec-2017	Wrong Order	17-Nov-2017	Physician Stop	01-Dec-2017	Pending	Discontinue	REFUSED COSL	TestPET, Gene		
age (L2) Intexa (Data) 4Documents 4Documents 1decu	110000000															
Serent Message (J.7) Lemes (J.) Decoments Lem Decoments (J.2) Index Liston Brens h h	sages (1/2)															
k(tems(2)) d Documents (cied Documents (2/2)) incidions heres by (pscepts	General Messages (1/2)															
lems (2) iert Documents iert Documents Reations Rems y Recepts																
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iert Documents (27) Index set Katlona Personal P Resigns	d Documents															
ications Items y Recepts	ient Documents (2/3)															
kation Items 9 Recepts	nders															
Receipts	cations															
Recepts																
y Receipts	tems															
dy Security	ih 🔰															
	tify Receipts															

2 Click on the **Enc Type** in the banner bar.



3 The Custom Information screen will appear. You will be able to identify if the patient has been discharged if the **Discharge Date** column is completed.



P Custom Informatio	n: GeneralSurgeonA, Mike						
Encounter Type Inpatient	Location LGH ED Hold ACWR	Admit Date 2018-Jan-24 05:36 PST	Discharg	ate	Encounter # 760000000393	Medical Service General Surgery	Reason for Visit Abdominal Pain
Full Name:	GENERAL GeneralSurgeonA, Mike]		
Reg Date/Time: D.O.S.: Nurse Unit:	2018-Jan-24 05:36 PST 72.6 LGH ED Hold	EMC Phone: Fin Number:	76000000393]		
Room:	ACWR						

4 If there is a discharge date, complete a PSLS Report assigning it to the Handler of the patient location as per the SOP.

Once the appropriate measures are taken to resolve the refused order, the order should drop out of the HIM Refusal Inbox.

ACTIVITY 5 – In Erroring Documents

Learning Objectives

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

In Error a Document

<u>Overview</u>

There may be times when a document needs to be in error'd. This would include when documents are:

- On the wrong patient chart
- On the wrong encounter
- The wrong document type
- Duplicate documents

Cerner is set-up to only allow the author of a document to in error their document. The exception to this rule, is HIM staff (Records Management and Transcription) who have been granted the privilege to in error documents of all authors, including scanned documents, Dynamic Documents and documents that were transcribed using FESR.

Note: Documents that have been transcribed using BESR (Back-End Speech Recognition) should be forwarded to the Transcription Refusal Inbox.

Activity 5.1 – In Erroring Documents (includes scanned documents)

1 In PowerChart, bring up the patient's chart.

Click the **Notes** tab and from the list of documents that appear, double-click on the document you that was created in error from the middle pane. The document will appear in the right pane.

сэтткоогния,	WILMADEMO							
CSTPRODHIM,	WILMADEMO		DOB:26-Jan-1984	MRN:700001770	Code	Status:	Process:	
Allergies: No Know	vn Allergies		Age:33 years Gender:Female	Enc:70000000112 PHN:9878216037	217 Dosin	ia Wt:	Disease: Isolation:	
Menu	ņ	K > - A Not	05					
Notes	Add 🖶			• 11				
Umers	Add	首 台 夠 🇠 📰	< X ≤ , ≤ ∈	₩ # ₩				
Results Review						: 8 out of 8 documents are	e accessible. (All Documents: Selected Encounter Only)	
Documentation	Add	Discharge Documer	ntation		_			
Patient Information		🗄 🗁 Discharge Sumr	mary		Result type: Result date:	Discharge Summary Monday, 02-October-2017 11	1:52 PDT	
Medication List	Add	02-Oct-2017	16:31 PDT - "Discharge Summa 11:52 PDT Smith, John Michael	ry'	Result status:	Anticipated		
Coding Clinical Sum		-X 02-000-2017	11.52 POT Shifti, Soni Wichael	Discharge Summary"	Performed by:	Smith, John Michael on Thur	sday, 30-November-2017 11:52 PST	
Diagnosos and Drohl	ame	02-Oct-2017	10:42 PDT Smith, John Michael	"Discharge Summary"	Encounter info:	7000000011217, LGH Lions	Gate, Inpatient, 02-Oct-2017 - 02-Oct-2017	
Allowice	ems	History and Physica History and Physica	al Reports			*	Preliminary Report *	
Allergies		02-Oct-2017	09:25 PDT TestUser, ManagerSup	ervisor-HIM	This is an antisingt	ad decument		
Histories		Progress Notes			This is an anucipat	ed document.		
5 4 5 FT 1		Urology Progres	is Note 13:53 PDT Poon Christina Irene	- "Urology Progress Not				
Birth Certificate		🗁 Surgical Document	ation					
CareConnect		😑 🗁 Operative Repor	t					
Clinical Research		02-0ct-2017	15:26 PDT Smith, John Michael - 15:26 PDT Poon Christina Irene	- "Operative Report" - "Operative Report"				
ED Summary		- · · · · · · · · · · · · · · · · · · ·						
Form Browser								
Immunizations								
Infusion Documental								
MAR Summary								
		•	m	•				
		@ Putros						
		By status						
		By date						
		Performed by						
		By encounter						

2 From the taskbar, select the In Error icon * .

Menu		< > ᠇ 🛉 Notes		
Notes	🕈 Add	1) 4 m la 2 m la 1 m la 2 m		
Orders	🕂 Add			
Results Review				: 8 out of 8 documents are accessible. (All Documents: Select
Documentation	🖶 Add	Discharge Documentation	Result type:	Discharge Summary
Patient Information		Discharge Summary	Result date:	Monday, 02-October-2017 11:52 PDT
Medication List	🕈 Add		Result status: Result title:	Anticipated Discharge Summary
Coding Clinical Summa		2-Oct-2017 11:41 PDT Smith, John Michael - "Discharge Summary"	Performed by:	Smith, John Michael on Thursday, 30-November-2017 11:52 F
Diagnoses and Problem		U2-Oct-2017 10:42 PD F Smith, John Michael - "Discharge Summary" Hereiter And Physical Reports	Lincounter IIIIO.	1000000011211, Con Lions Gate, Inpatient, 02-Oct-2011 - 02
Allergies		History and Physical		* Preliminary Report *
Histories		02-Oct-2017 09:25 PDT TestUser, ManagerSupervisor-HIM	This is an anticipate	d document.

3 The Result Uncharting window will appear.Enter a reason for the in error and then click OK.



P Result Uncharting - CSTPRODHIM, WILMADEMO - 700001770	23
In Error Comment - Optional	
Comments:	
Document created on the wrong patient.	
·	
OK Cancel	

4 The following dialogue box will appear. To proceed, click **Yes**.



5 The status on the report should change to **In Error Report**.

The staff member and the date/time that the in error occurred is electronically stamped on the report along with any reasons entered in the Comment field.

Once you have refreshed your screen, the document status will also change in the Notes tab.

	: 8 out of 8 documents are accessible. (All Documents: Selected Encounter O
 Discharge Documentation Discharge Summary Q2-Oct-2017 16:31 PDT - "Discharge Summary" Q2-Oct-2017 11:52 PDT Smith, John Michael - "Discharge Summary" Q2-Oct-2017 11:41 PDT Smith, John Michael - "Discharge Summary" Q2-Oct-2017 10:42 PDT Smith, John Michael - "Discharge Summary" History and Physical Reports History and Physical Q2-Oct-2017 09:25 PDT TestUser, ManagerSupervisor-HIM Progress Notes Q2-Oct-2017 13:53 PDT Poon, Christina Irene - "Urology Progress Note Surgical Documentation Operative Report Q2-Oct-2017 15:26 PDT Smith, John Michael - "Operative Report" Q2-Oct-2017 15:26 PDT Poon, Christina Irene - "Operative Report" 	Result type: Discharge Summary Result date: Monday, 02-October-2017 11:52 PDT Result status: In Error Result title: Discharge Summary Encounter info: 700000011217, LGH Lions Gate, Inpatient, 02-Oct-2017 - 02-Oct-2017 Image: Status: Image: Status Status Status Result title: Discharge Summary Encounter info: 700000011217, LGH Lions Gate, Inpatient, 02-Oct-2017 - 02-Oct-2017 Image: Status Status Status Image: Status Status Status Result Comment by Poon, Sylvia on Tuesday, 12-December-2017 17:43 PST Document created on the wrong patient.

Also, under the Documentation tab, you will see a listing of all documents and under Status, it will be marked as In Error.

CSTPRODHIM, WILMADEMO								🔶 List 🔿 🆓 Re
CSTPRODHIM, WILMADEMO	DC Ag)B:26-Jan-1984 e:33 years	MRN:700001770 Enc:7000000011217	Code	Status: Process Disease	:		Location:LGH 6W; 607; 03 Enc Type:Inpatient
Allergies: No Known Allergies	Ge	nder:Female	PHN:9878216037	Dosir	ig Wt: Isolatio			Attending:
Menu 🕈	< 🖂 🔹 者 Documen	tation						(II) Full screen 🛛 🗃
Notes 🕂 Add	Add Sign D For	vard 🔲 Provider Letter 🗌 💕 N	fodify b 2 by D	In Front I	Preview			
Orders 🕂 Add	List	novaci cetter i in						
Documentation 🕂 Add	Dis ay : 📶 👻)						🎓 F
Patient miteri	Service Data (Time T S		T	F	Author Contributor(a)	Charles		Diasharan Summara
Medication List 🛛 🕂 Add	05-Dec-2017 10-24-00 PST_C	onsult Note	Advance Care Planning	LGH Lions Gate	Testliker MedicalStudent	Unauth	Result date:	Tuesday, 28-November-2017 07:47 PST
Coding Clinical Summary	05-Dec-2017 10:23:00 PST A	PSO Note	Advance Care Planning	LGH Lions Gate	TestUser, MedicalStudent	Unauth	Result status:	In Error
Diagnoses and Problems	04-Dec-2017 12:56:00 PST A	llergy Rule	Allergy Rule - Text	LGH Lions Gate	TestUser, MedicalStudent	Auth (Verified)	Result title:	TestUser, MedicalStudent on Tuesday, 28-Nov
Allergies	28-Nov-2017 19:35:00 PST A	dmission H & P	Admission Note Provider	LGH Lions Gate	TestUser, Cardiologist-Physician, MD	Autor (Vennes)	Performed by:	PST
Antigita	28-Nov-2017 07:47:00 PST D	ischarge Summary	Discharge Summary	LGH Lions Gate	TestUser, MedicalStudent	In Error	incounter	700000015611, LGH Lions Gate, Inpatient, 2
Histories	14-Nov-2017 11:57:00 PST D	ischarge Summary	Discharge Summary	LGH Lions Gate	TestUser, Cardiologist-Physician, MD		inito.	
	14-Nov-2017 11:56:00 PST D	ischarge Summary	Discharge Summary	LGH Lions Gate	TestHIM, GeneralMedicine-Physician, MD; TestUser, Cardiologist-Physicia	n, MD Auth (Verified)		* In Error Report *
Birth Certificate	18-Oct-2017 13:00:00 PDT D	ischarge Summary	Discharge Summary	LGH Lions Gate	TestHIM, GeneralMedicine-Physician, MD	Anticipated		in Entri Report
	18-Oct-2017 12:02:00 PDT D	ischarge Summary	Discharge Summary	LGH PF Lab	TestHIM, Cardiologist-Physician, MD	Anticipated	Result Commen	t bv Schneider. Maggie on Tuesdav. 28-Nove



ACTIVITY 6 – 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 6.1 – Quick Reg a Patient

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



From the Citrix StoreFront, click on the PM Office icon

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



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.**

BC PHN: I MRN: Last Name:	
Du Fritti MRN: Last Name:	
MRN: Lest Name:	
Last Name:	
First Name:	
Gender:	
Postal/Zip Code:	
Any Phone Number: No encounters found.	
Encounter #:	
Visit #:	
Historical MRN:	
MPI Search	
	ådd Person

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

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

🕙 Person Search	
BC PHN:	No persons found.
MBN:	
Last Name: RUBBLE	
First Name: BETTY	
D08: 12.Dec.1917	
Gender:	
▼ Postal/Zip Code:	
Any Phone Number:	No encounters found.
Encounter #:	
Visit #:	
Historical MBN:	
Search Reset	
MPI Search	



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

Select the Facility you require then click on OK.

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

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

🕅 External MPI		🐴 External MPI						-	
		MPI Search	Results	1					
		Match Score	Deceased	Name	BC PHN	MRN	Gender	Birth Date	Age
		33		RUBBLE, BETTY	9879897966		Female	27-Sep-1962	55 yea
		4		RUBBLE, BARNEY B	9890614684		Male	05-May-1965	52 yea
		4		Rubble,Barney B	9890798455		Male	05-May-1965	52 yea
Searching External MPI system.									
	\rightarrow								
Cancel Search									
		4 ()////////////////////////////////////							Þ
								Select C	ancel

Correct Patient is Found

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.

							A External MPI				×
Score Decease	A Name	RC DHN	MRN Gende	Birth Date	Age						
33	RUBBLE, BETTY	9879897966	Fema	e 27-Sep-1962	>55 yea						
4	RUBBLE, BARNEY B	9890614684	Male	05-May-1965	52 yea						
4	Rubble, Barney B	9890798455	Male	05-May-1965	52 yea						
								Retrieving person f	from External MPI syst	tem.	
						\longrightarrow					
				\frown	Þ						
				Select	Fancel						
				Select	▶ Cancel						
				Select	▶ Cancel						
				Select	▶ Cancel				\checkmark		
۲۰ Quick Reg				Select	Cancel				\checkmark		
내 Quick Reg				Select	► Cancel				\checkmark		
V Quick Reg	Encounter Number:	of Name:	First Name:	Select	Eancel	Previous Last Name	Date of Binh: 275ep192 ◎ .	Age	Gerder: Femde	BCPHH: 9897997356	
Quick Reg Jo Medical Record Number: 700000859 [All FBTS]: Patient Infor	Encounter Number La Resource Information Linearcen	et Name: URBLE	First Name BETTY	Select	Profemed Na	Previou Last Name	Duter of Binty 275ep1982 💿 💌	Age	Gender: Female	BC PHN • 5073657366	
Quick Reg Medical Record Number: 7000008ecold Number: ALERTS Patient Infor	Encounte Number: La Resulta Information Insurance	ri Nanoc DBBLE Irouance Summy	First Name: BETTY	Select C	Eancel	Per-ion Lat Name	Date of Berly. 275-p-1962	Адж 55У	Gender Fende	6CPH • 9873097366]
Quick Reg Quick Reg Medical Record Number, 700008999 ALERIS Patent Infor Encourier Type:	Encourte Nuebec La Resource Information Insuance Medical Service I	ri Name LIBUE Innuance Summay Reason for Viat	First Name: BETTY	Select C	Eancel	Previou Last Name	Date of Beth 275sp1982	hgg 55У	Gender. Fende	6CP48 • 5075957566	
Y Quick Reg Guick Reg Medical Peccel Number: 700000858 ALERTS Patient Infor Encourter Type: Location Location	Encounter Hanber R Resource Information Insurance Medical Service	rt Name DBLE Insuance Summay Reason for Visit	First Name: BETTY	Select C	Cancel	Per-low Lat Name	Date of Belly, 275ap-1962	Age 557	Gender. Pende	ECPIN. • 9873997366	
V Quick Reg	Encounter Number La Batien Documenter Instance Medical Service U Buddrag U U (DH Lion Gale U	el Nanos UBILE Insuance Summay Reason for Vait	First Name: BETTY Bed Availabilit	Select C	Proteend Not	Per-kau Lait Name	Date of Binh; 275ep1952	} 55¥	Greder Fende	8CP9N • 9873997366	
Quick Reg ded Heddal Record Number: 700000898 Incorter Type: Logation Parity: Light Lines Gate - Care Provide:	Encourse Number: La Mation Encourse Information Insurance Mational Service: Building Dubling Dubling Dubling	er Nanne UBDLE Insuano for Vait Deal/Elnic	First Name: BETTY BEd Available	Select C	Protected National States	Pre-issa Lart Nane	Dun d Binh 275ep1952 ♀ ●	Age 55V	Bandar Fende	0.CPM • 5873897366	
Quick Reg Med-of Record Number: Ya00008989 ALERIS Patent Info Encounter Type: Loation Facility Löht Linns Gate Care Provides Altending Provide:	Encounte Number: La Madeia Service: Diddeg La La Constante Internation Diddeg La Constante Internation Licht Lava Gase . Refereng Provide: .	er Name URBLE Insuance Summay Reason for Visit Ure/Clenic Phinage Case Provider (FPC)	First Name: BETTY Bed Available PCP Vesied?:	Select C	Patered No Bed	Previou Last Name	Date of Birth 275ap-1982	Age 397	Gerde: Pende	€CP48 ► 5875957566	

2 Select the **Encounter Information** tab:

Registration Time: Quick Reg User Name:

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

ALERTS Patient Information E Encounter Type Ustantward Data Stroope Deceased Outside Inages Specimen	Encounter Information) Insurance Insurance Medical Service: Reason for Building: Unit/Clinic: LGH Lions Gate	e Summary	ounter Information Insurance Insurac	su sc	
V Quick Reg					- 3 💌
Add Medical Record Number: Los Name: Los Name: RUBBLE 2000008989 Encounter Number: RUBBLE [ALERTS] Patient Information Encounter Information Insurance). Insur Encounter Type: Medical Service. Respon	e: Fist Name Midde Name arcs Summay new York	Preferred Name: Previous Last Name	z Dyle of Brifs. 275ep1962 Sty 55Y	Gende: EC PH9: Female • 9875957966	
Dala Storage • HIM Documentation • - Location • • • Facility Building Unit/Cli Unit/Cli LGH Linns Gate • • • - Care Providers • • •	inic: Bed Availability	Bed •			
Attending Provider Primary Comment Comment	/ Care Provider (PCP): PCP Verified?:				^ []
Account Data Registration Time: Quick F 13Dec-2017 T T 1236 Peen	Reg User Name:				

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



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

Click **OK** to complete the conversation.



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

Click OK.	
Quick Reg	×
The following LGH Lions Gate Hospital aliases have been assigned for RUBBLE, BETTY: Encounter Number: 700000016610 Visit Id: 700000016610	
ОК	\supset

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.

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.

CPHN:	No persons found from the MPI Search.
RN:	
sst Name:	
UBBLE	
st Name:	
AMM-BAMM	
D8:	
2-Feb-2000 🔶 💌	
ender:	
▼ sstal/Zip Code:	
y Phone Number:	No encounters tound.
ncounter #:	
oit #:	
stoncal MHIN.	
Search Reset	
MPI Search	

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.

* Address type: Home Mail
* Address type: Home Mail
Country:
Address 1:
301 Cobblestone Way Address 2: City: Bedrock
<pre>* Province/State: (Required when country is Canada or USA) Louisiana v Postal code (A#A #A#)/Zip code (#####): 70777</pre>

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

✓ Quick Reg	- 8 - X
😳 🗙 The PHIs Request was accessful	
Medical Record Number Encounter Number Lat Name First Name Midde Name Petered Name	
ALERIS Patient information Encounter Information Insurances Insurances Januares Summary	
Encounter Type Medical Service Research In Vial	
- Lookin	
Fedry Balding Unk/Clinic: Room: Bed LDH1Lines faster - End Analability - -	
- Cae Povides -	
Attending Provide: Primery Care Provide (PD) PD/ Verified?	
- Connerl	
Connect	A
- 4000 TA	*
Registration Late Registration Time Quick Reg Use Name 142ee-2017	



5 Select the **Encounter Information** tab:

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

_	ALERTS F Encounter Data Stor Deceased Outside Im Specimen	Patient Information	Incounter Information Medical Service: Building: LGH Lions Gate	Reason fo	ce Summary or Visit: ::		Encounter Informa Medical Service: HIM Documenta Gynecology Hematology HIM Documenta Hospitalist Medic Medical Imaging	tion insurance Insu tion Rease			
🐓 Quick Reg											- 0 -
3											
🕲 🗙 The PHN Request w	as successful.										
Medical Record Number: 700008961 ALERTS Patient Information	Encounter Number:	Last Name: RUBBLE	First Name: BAMM-BAMM	Middle Name:	Preferred Name:	Previous Last N	me: Date of Birth: 22-Feb-2000	Age:	Gender: Male	BC PHN: 9876405925	
Encounter Type: Data Storage	Medical Service: • HIM Documentation	Reason for Visit									
Facility: LGH Lions Gate	Building: LGH Lions Gate	Unit/Clinic:	Bed Availability	Room:	▼ Bed:	•					
Attending Provider:	Referring Provider:	Primary Care Provider (P	CP) PCP Verified?:	•							
Comment:											* *
Account Data Registration Date: 14-Dec-2017	Registration Time:	Quick Reg User Name:									

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

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

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

