User Manual

CDI Work Queue Monitor Workbook

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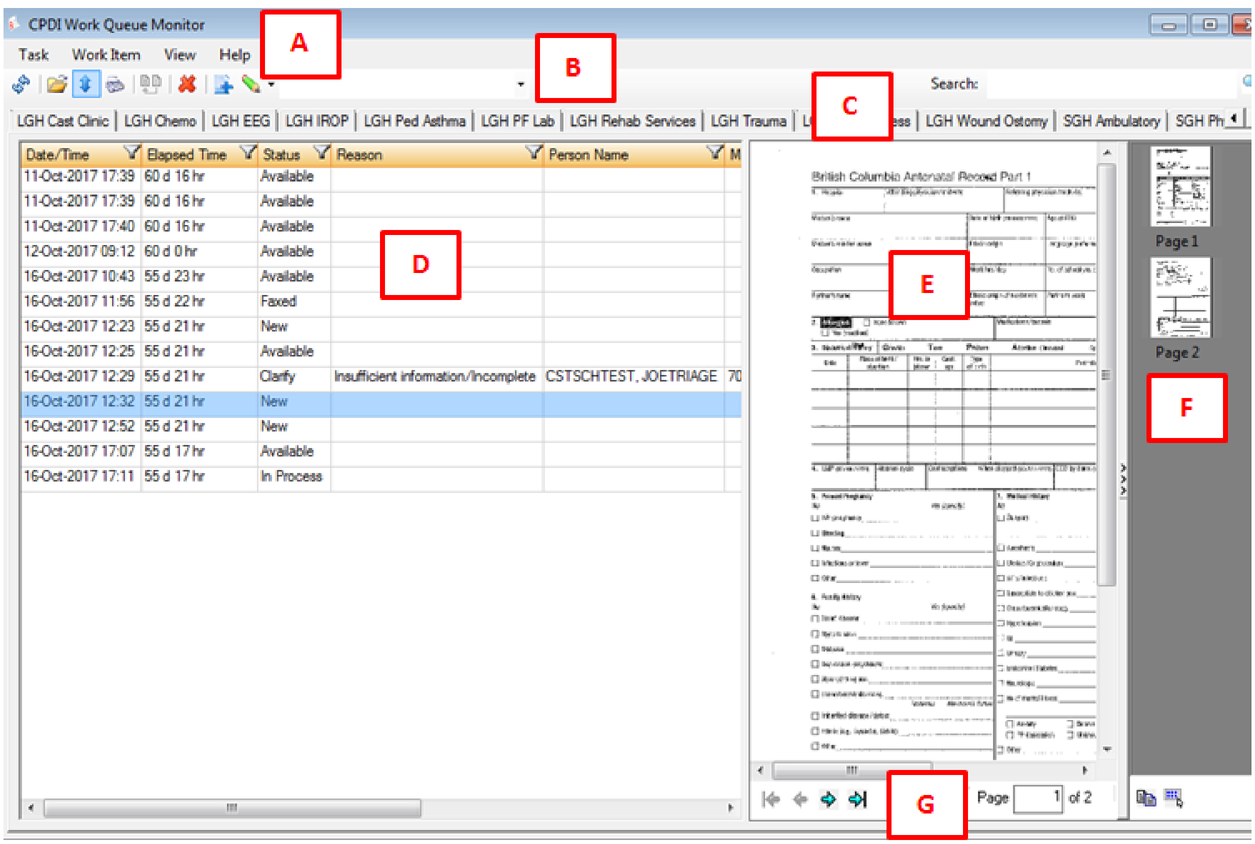
Overview: Work Queue Monitor (WQM)

With the CST implementation, all paper referrals and documents that are faxed to a clinic will be accessed in **Work Queue Monitor (WQM)**. Faxes will no longer be printed on paper.

Work Queue Monitor (WQM) is a document management solution that enables scanned/faxed documents to be routed to specific queues for review. From WQM, you can associate documents to patients and visits, making them available in the patient's chart. This will streamline departmental processes by automatically populating work queues for processing and also eliminate the need to print and scan documents.

Below is a screenshot of the **Work Queue Monitor** home page with a brief description of each section.



A. **Menu Bar**: Includes Task, Work Item, View and Help options.

B. **Toolbar**: Includes buttons or other window elements (such as Refresh, Open, Route, Fax, Delete, New and Edit options).

C. **Clinic WQM Queues**: Each tab is for individual clinic's WQM queue. When a new fax comes in, it goes directly to a specific clinic's WQM queue.

D. **A List of all Faxes**: Displays all the faxes received in a specific clinic with information on date/time, status, owner, encounter type etc.

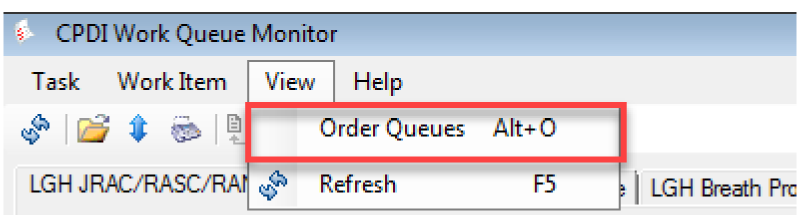
E. **Faxed Document Image**: Displays the individual document if selected in the displayed faxed images.

F. **All Page View Bar:** Displays each page of a document separately on the right hand side of the screen. By clicking on a specific page number, the page displays in the faxed document image area.

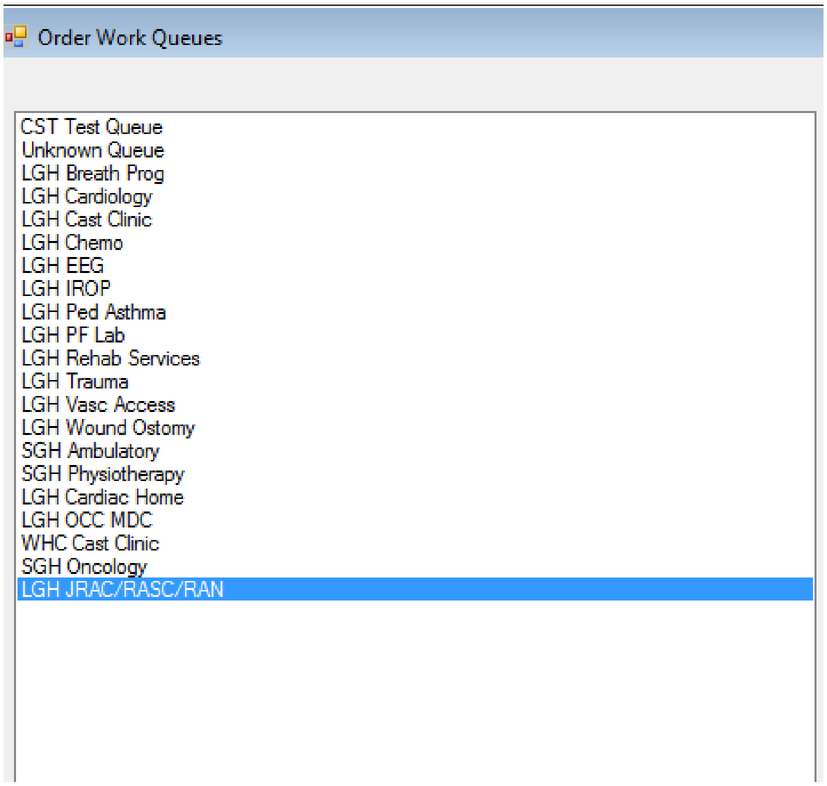
G. **Task Bar:** Includes functions such as Printer, Scanner, Page Navigation, Copy, Zoom in/out etc.

Reorder Clinic Queue/s in WQM

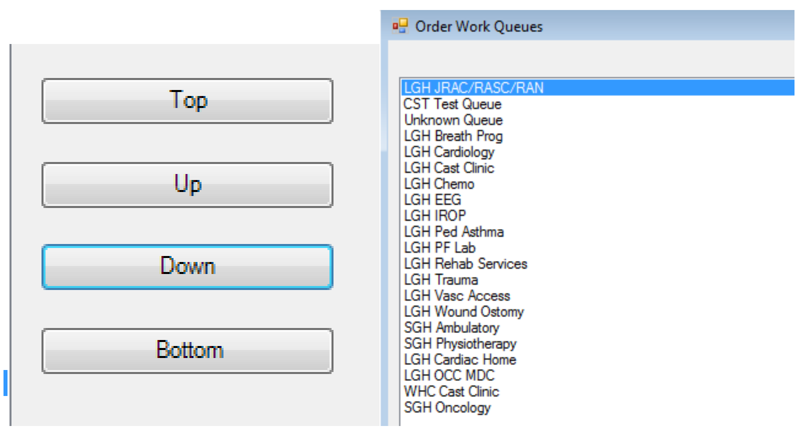
1. Click **View** from the WQM Menu. Click on **Order Queues**.



2. Clinic on the clinic name that needs to be moved.



3. Click on the **Top** button to move it to the very beginning. Click on the **Down** button to move it to the very end. Click on **Up** or **Down** buttons to move one position at a time until the desired order is reached.

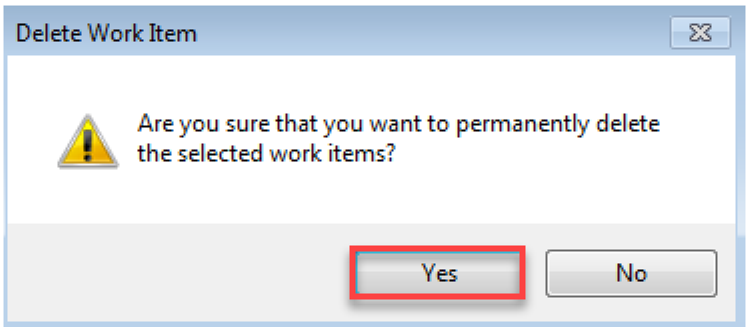


Delete a Document in WQM

If a document on the queue is not appropriate to link to any patient chart, it can be deleted. Follow the steps below to delete the document from the queue.

1. Right-click on the document that you would like to delete.
2. Click the **Delete** button to remove the fax from the queue. The **Delete Work Item** window will pop up.

3. Click **Yes**.



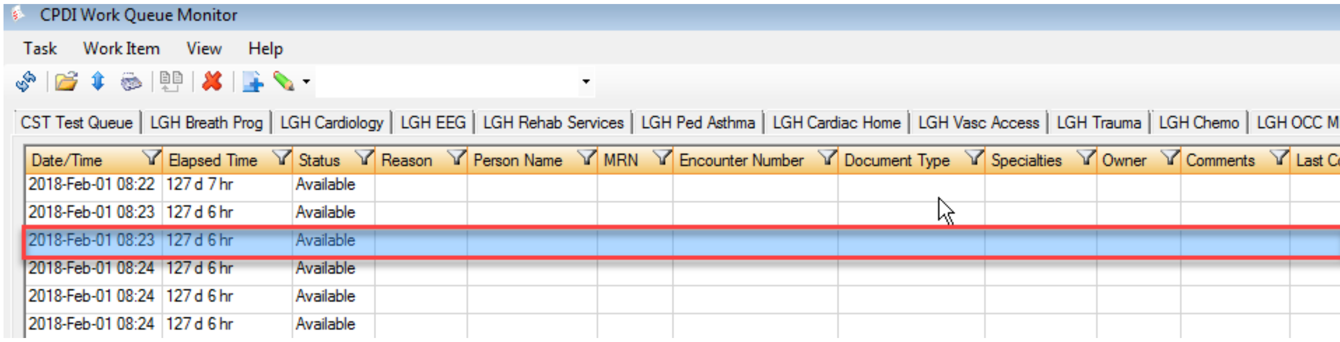
NOTE: The Delete function **permanently** deletes the documents from WQM; it is same as putting your paper fax in a paper shredder.

Re-Routing a Document to Another Clinic in WQM

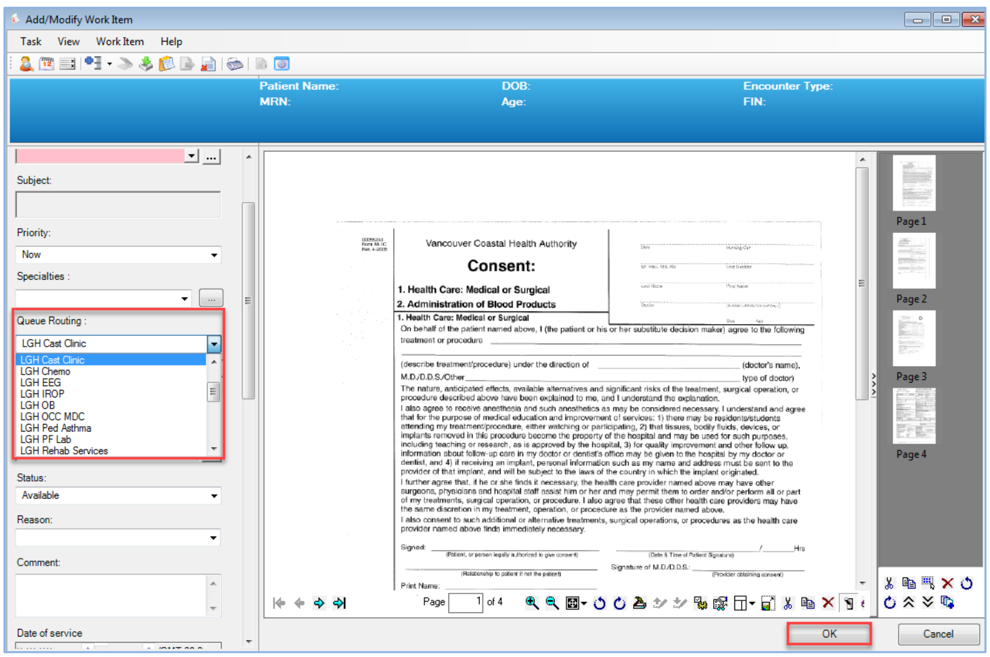
Queues in **WQM** are the equivalent of fax lines. It is therefore possible for a document to end up on the wrong clinic queue. Follow the steps below to re-route the document to the intended clinic/departmental queue.

NOTE: It is best practice to notify the Referring Provider's office of the error so it is not repeated.

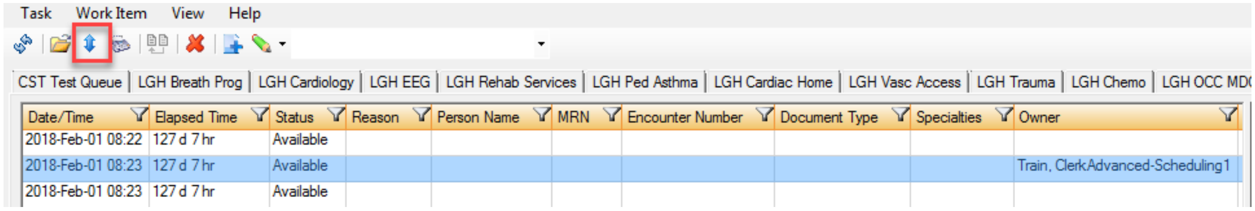
1. Open **CDI Work Queue Monitor.**
2. **Double click** on the work item needing re-routing. The **Add/Modify Work Item** window will open.



3. In the **Add/Modify Work Item** window, select the correct clinic/departmental queue from the **Queue Routing** drop-down list.
4. Click **OK** to close the **Add/Modify Work Item** window. WQM will automatically return to the **CPDI Work Queue Monitor** landing page with the work item highlighted on the original clinic/departmental queue.



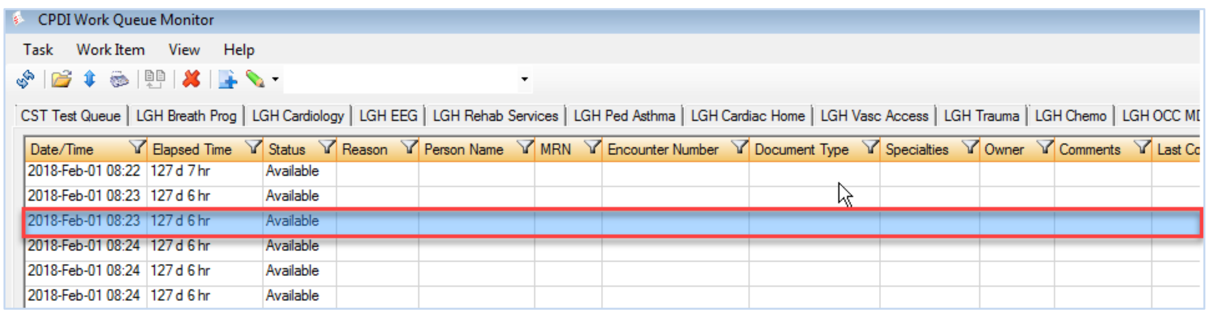
5. Click the **Route** icon on **Toolbar** to forward it to the correct clinic queue. Once it has been e-routed, it should fall off the original queue.



Fax Documents from WQM Queue to Non-WQM Faxe Numbers

Queues in WQM are the equivalent of fax lines. It is therefore possible for a document to end up on the wrong clinic queue which may require it to be re-faxed to a non-WQM fax number. Follow the steps below to fax the document to the intended fax number.

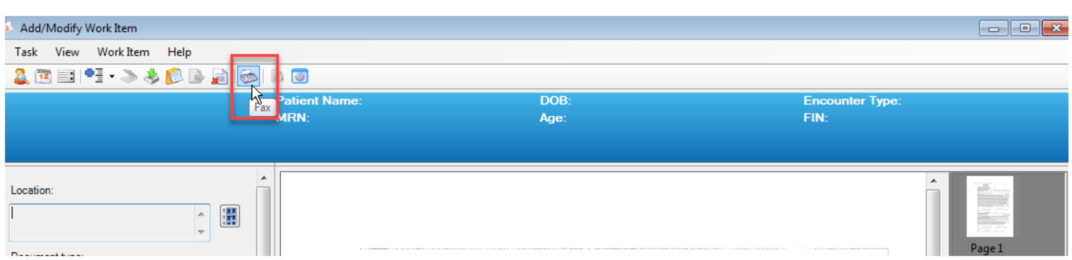
1. Open **Work CDI Work Queue Monitor**. 
2. **Click** on the work item needing to be faxed to non-WQM fax number.



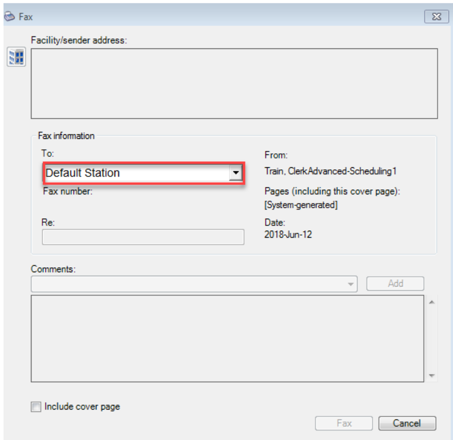
3. **Click** on the fax icon  in the **Toolbar**. The **Fax** window will be pop up.

NOTE: You can also fax from the **Add/Modify Work Item** window by:

I. Double click on the work item needing to be faxed to non-WQM number. The **Add/Modify Work Item** window will be displayed.
II. Click on the Fax icon.
III. Continue with below listed steps 4-7.



4. Select **Default Station** from the drop down menu in the **To** field. The **Remote Report Distribution Selection** window will pop up.

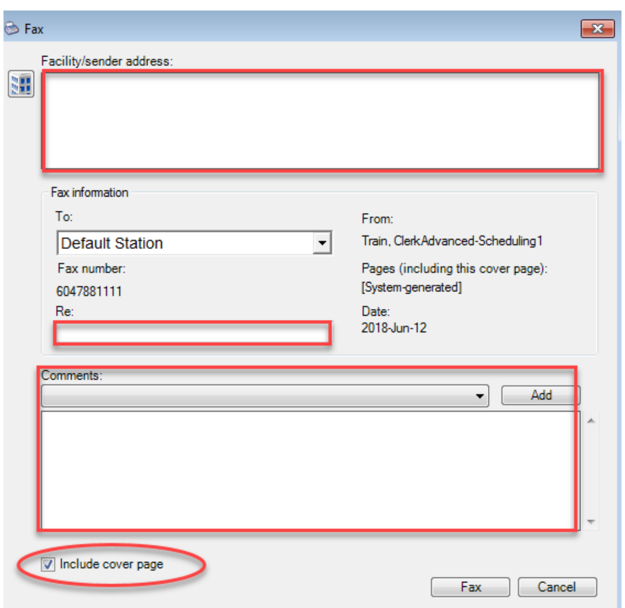


5. In the **Remote Report Distribution Selection** window enter the *destination fax number*.

   Enter the fax number including the <u>area code with no spaces or dashes</u>.

   - If you want to send the fax immediately, leave the **Transmit Date / Time** as *Non-Scheduled*, as that is the default with the current date/time.
   - If you want to delay sending the fax, click on the **Scheduled** radio button and enter the *date/time* you want to fax the document.
   - Click **Ok**. The **Fax** window will pop up.

6. In the **Fax** window, select **Include cover page** to include a cover page. Once this is selected you can add text to **Facility/Sender address**; **Re** and **Comments** fields.



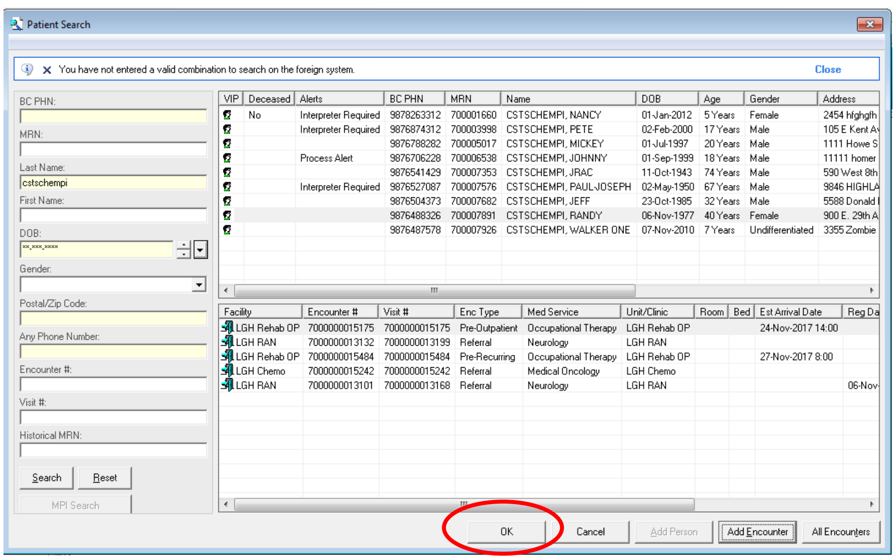
7. Click **Fax**.

Scan a Paper Document to a Patient Chart

Paper documents that are received or generated during a patient’s visit need to be attached to the patient’s chart. This will be done by faxing the document to your **own clinic queue**.

Follow the steps below to fax a document into **WQM**:

1. From a fax machine, fax the document to the correct fax number for the clinic.
2. Log into **CDI Work Queue Monitor.** 
3. Click on the appropriate clinic queue/tab.
4. Double-click on appropriate row in the queue to open the **Add/Modify Work Item** window.
5. With the referral open in the **Add/Modify Work Item,** click on the **Select Patient** icon. 
6. Search for the patient by entering the **PHN** then click **OK** (if you do not have a PHN, search by partial Last Name and First Name or Date of Birth and Gender).
7. If you have found the correct patient, click only <ins>**ONCE**</ins> on their name, select the Encounter for the patient’s <ins>current visit</ins> and select **OK.** Do <ins>not</ins> create a new Encounter.



8. In order to complete indexing, complete the below fields in **Add/Modify Work Item** window:

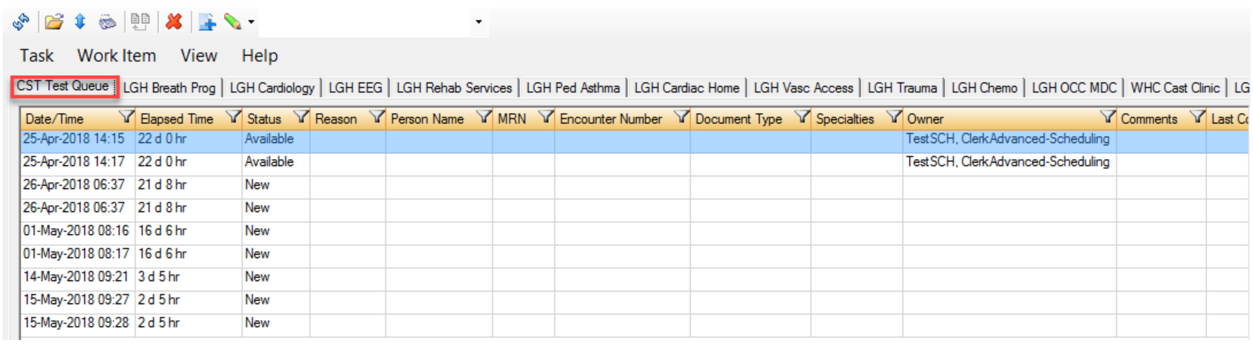
    Document Type: Choose the appropriate option from the list (it is possible to leave this field blank if the type is not known)
    Status: *Complete*

Performing Provider: *Scanned, Document*

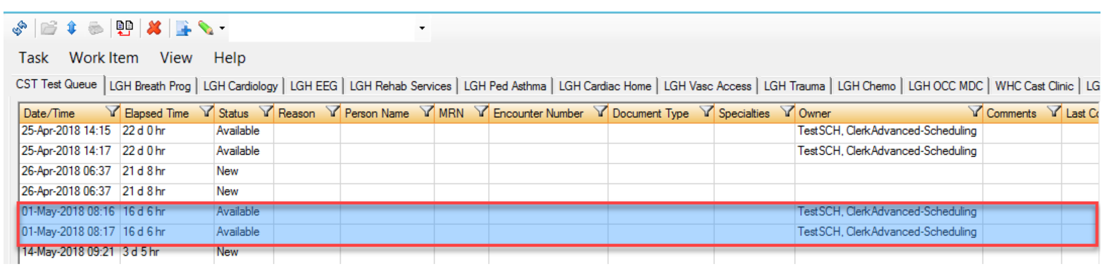
9. Click **OK** to close the **Add/Modify Work Item** screen and the document will drop off the clinic's **WQM** queue.
10. All scanned documents are to be stamped **scanned** and bundled together daily with a **Clinic Scanning Cover Sheet** on top and forwarded to **HIM** (Health Records Department) for auditing and storage for pre-destruction. This includes any documents that were manually faxed into **Work Queue Monitor** as they follow the same processes as single document scanning.

Merge Documents in Work Queue Monitors

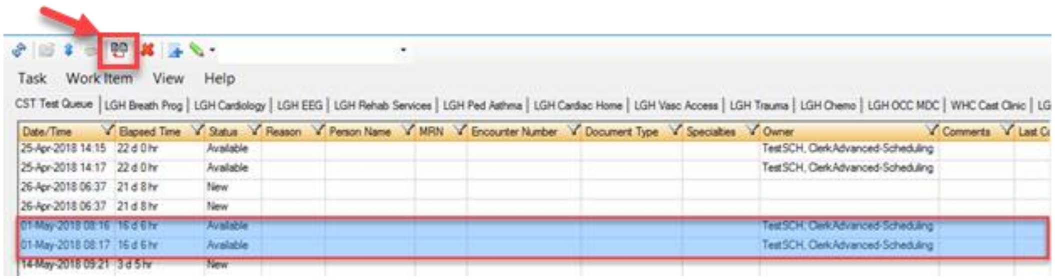
1. Open the appropriate queue in **CDI Work Queue Monitor**.



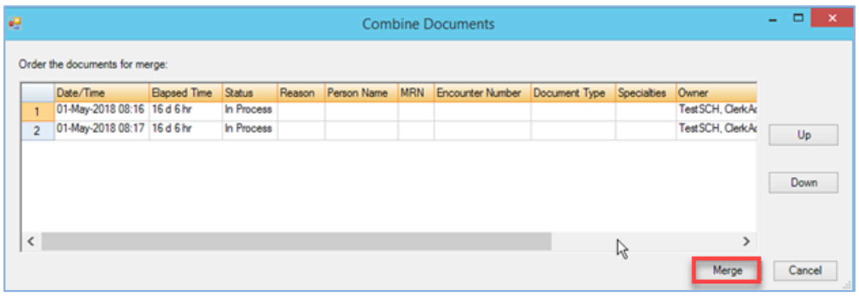
1. Highlight the items that need to be merge by:
   i. **Click** on the first document to select it.
   ii. **Hold** the **Ctrl** key on your keyboard **select** the next document(s) that need to be combined.



2. Click the **Combine** icon  from the top toolbar. The **Combine Documents** window will pop up showing the sequence of all the highlighted documents that will be merged together.



3. Click **Merge**.



NOTE: When you are selecting multiple documents, make sure to highlight them in the order that you would like them to be combined together. Do not use the up or down buttons to adjust the order of the documents in this window.

Open a Document in WQM

Follow the steps below to open a faxed document in WQM:

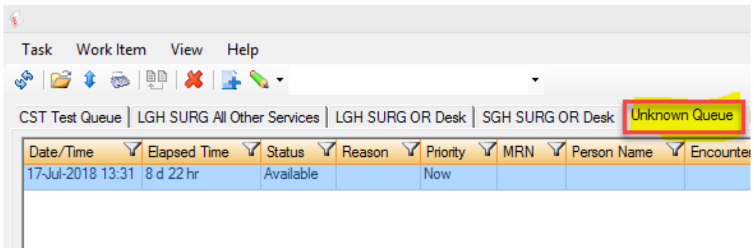
1. Log into **CDI Work Queue Monitor**.
2. Click on the appropriate clinic queue/tab.
3. Double-click on the appropriate row in the queue. The document will appear in **Add/Modify Work Item** window.

NOTE 1: If you incorrectly open a document; click **Cancel** Cancel in the **Add/Modify Work Item** window.

Closing the **Add/Modify Work Item** window after opening a document will forward the document to the **Unknown Queue**. To prevent this, you can:

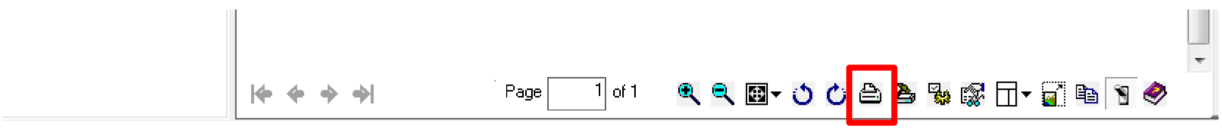
a. select your own clinic/department queue in the **Queue Routing** field before exiting out the window or simply b. click on the **Cancel** button.

NOTE 2: If you are unable to find a faxed document in your clinic/department queue, always check the **Unknown Queue.**

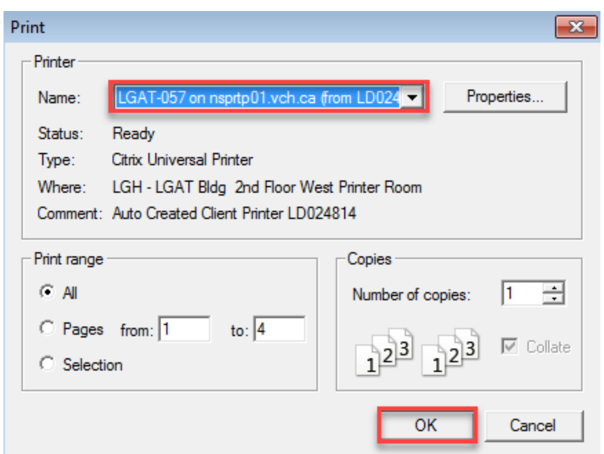


Print a Document from WQM

1. Click on the document that needs to be printed.
2. Click on the **Printer** icon located at the bottom-right side of the screen. The **Print** window will pop up.



3. Select the appropriate printer from the drop down menu. Click **OK**.



Link a Document to a Patient/Encounter

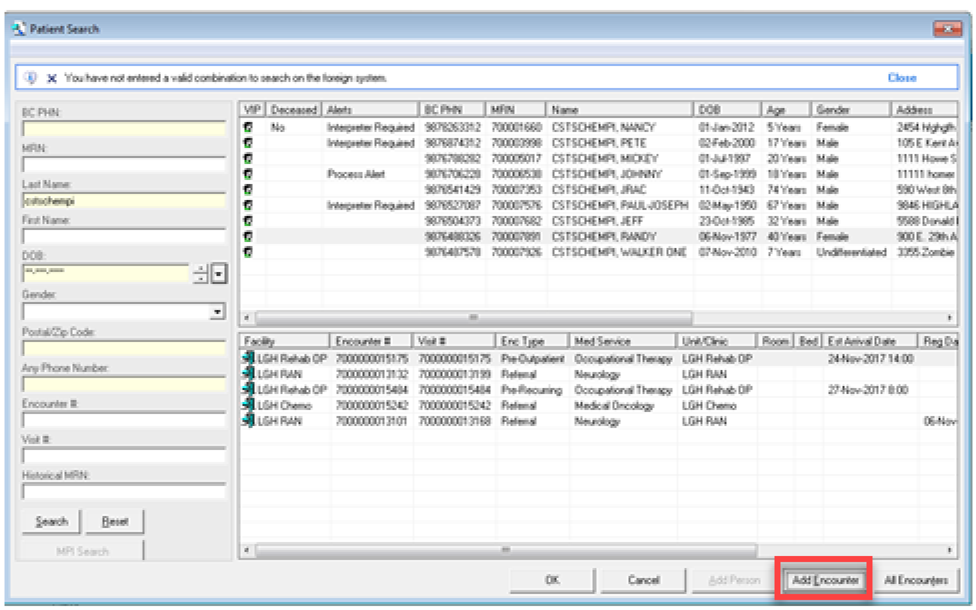
1. With the referral open in the **Add/Modify Work Item**, click on the **Select Patient** icon.


2. Search for the patient by entering the **PHN** then click **OK** (if you do not have a PHN, search by partial Last Name and First Name or Date of Birth and Gender).

3. If you have found the correct patient, click only <u>ONCE</u> on their name to select, then click **Add Encounter**.

NOTE: The patient may already have an existing encounter that is appropriate for this document to be attached to. For example:

- If information is arriving after the original referral package was received, there may already be a **Referral** encounter.
- If an appointment has already been booked, there will be a **Pre-Outpatient** encounter.
- In the above cases, you would select an *existing* encounter from the Encounter list.



4. The **Organization** window appears.
5. Select the *Facility Name* in **Organization** window and click **OK**.
6. The EMPI window briefly launches to open the **Referral Management** conversation window.
7. Click the **Encounter Information** tab to complete the below mandatory fields:

Encounter Type: *Referral* (auto-defaults)
Medical Service: *Select an option from the list*
Reason for Visit: *Add a reason for the visit*
Referring Provider: *Select a Referring Provider*

8. Click the **Referral Info** tab to complete the below mandatory fields:

Referral Received Date: *Type **T** for today's date*
Referral Status: *Select an appropriate status from the list*

NOTE 1: Selecting a **Referral Status** of *Ready for Triage* drops the patient to the Triaging Provider's Dynamic Worklist in **PowerChart** for review.

NOTE 2: If additional action steps are required before the referral can be forward to Triage, set the **Referral Status** to *Referral Received*.

9. Click the **Complete** button to close the **Referral Management** conversation.
10. The **Referral Management** window opens with an Encounter Number and Visit ID.
11. Click **OK** to close the **Referral Management** window.

Index a Document in WQM

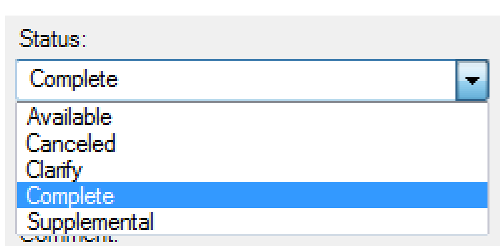
All documents received in WQM **<u>MUST</u>** be indexed with an appropriate **Document Type** and **Status** so they can be stored appropriately in the Patient's chart.

1. If sufficient information is provided to link the document to a patient/encounter, it is appropriate to **Complete** the document. This will take it off the queue and save it in the patient's chart.
    i. In order to complete indexing, enter the below fields in **Add/Modify Work Item** window and click **OK**.

Document Type: *Choose the appropriate option from the list*

Status: *Complete*

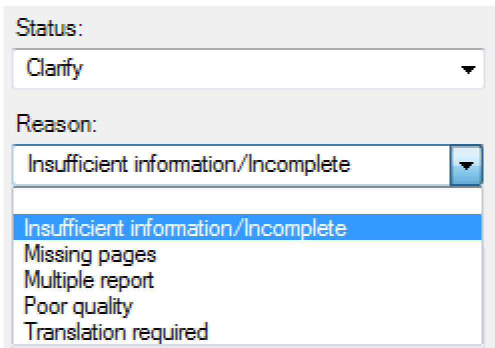
Performing Provider: *Scanned, Document*



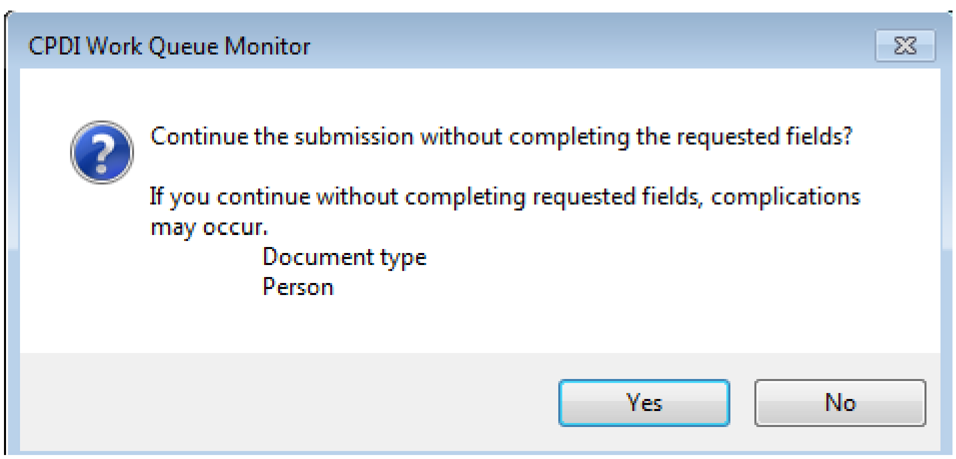
2. If there is not enough information to complete the document, the **Status** should be set to <u>*Clarify*</u>. This will keep the document in the queue until sufficient information is obtained.

   i. Enter the below fields in the **Add/Modify Work Item** window and click **OK**.

      Document Type: Choose the appropriate option from the list (it is possible to leave this field blank if the type is not known)
      Status: *Clarify*
      Reason: Choose the appropriate reason. For example:
      - Select *Insufficient information/Incomplete* if the patient's name is not listed
      - Select *Missing pages* if an order is missing
      - Select *Poor quality* if the reports are illegible

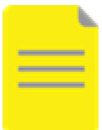


   ii. The below **CPDI Work Queue Monitor** pop-up window may appear. Click **Yes** to continue.

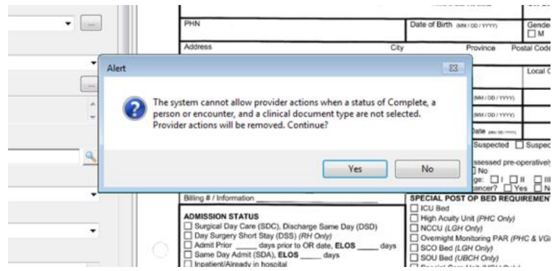


NOTE 1: Contact **the Records Management Department** if you accidently index documents to an incorrect document/encounter/patient.

NOTE 2: Contact the **Records Management Department** if you forgot to select *Scanned, Document* in the **Performing Provider** field.



NOTE: An **Alert Message** pops-up in **WQM** anytime you change the **Complete** status to any other status such as **In Progress/Pending,** etc. If you click **Yes**, it will close out that window and there will only be changes to the indexing if you had already added a provider to sign off on the document. In this case, the provider actions would be removed.



Split Document in WQM

When a multi-page fax is received that includes different documents types (ex: Lab Results, Consent Forms, Imaging Reports, etc.), the clerk must **split** the document. This involves dividing the document into different sections, linking each section/document to a **Patient/Encounter** and indexing each section/document with the appropriate **Document Type** in **WQM**.

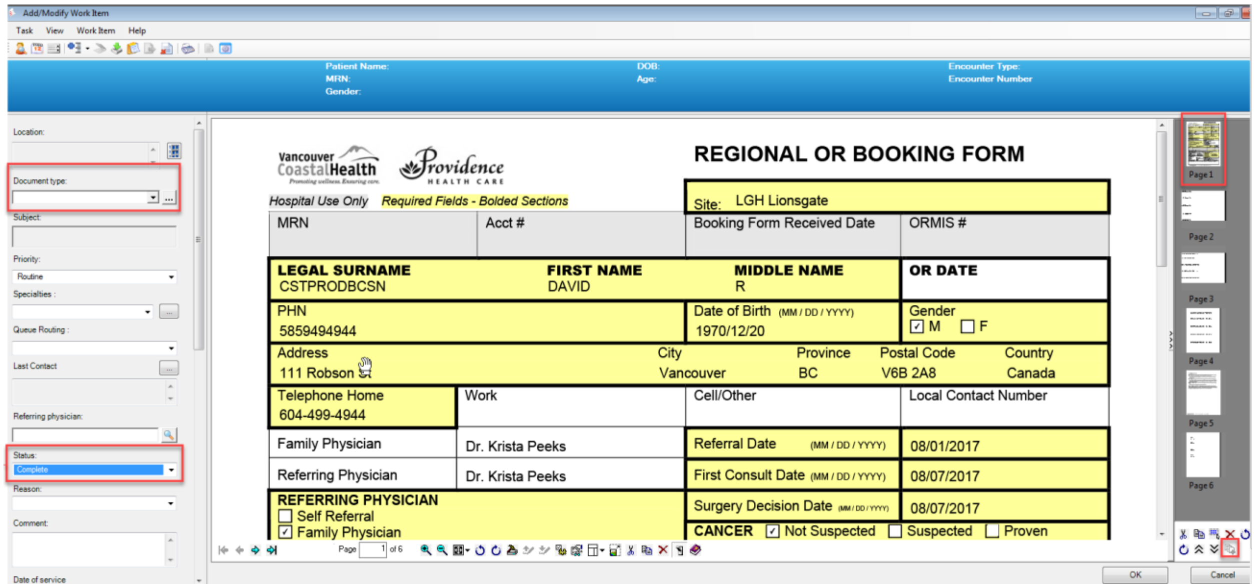
The document may also need to be split when multiple referrals for multiple patients have been faxed in one package. The scheduler would need to split out each patient's referral and link it to the appropriate patient and encounter.

1. Follow the steps in the **Link a Document to a Patient/Encounter** section to link all pages of the received fax to a patient/encounter.

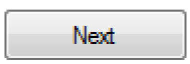
   In order to finish the indexing & splitting of the documents, complete the below steps in the **Add/Modify Work Item** window:

2. In the **Add/Modify Work Item window**, select the first document preview located on the far top right-hand side of the screen then click the **Split** icon from the Toolbar (located at the bottom of the right-hand side of the screen). The non-selected pages will be

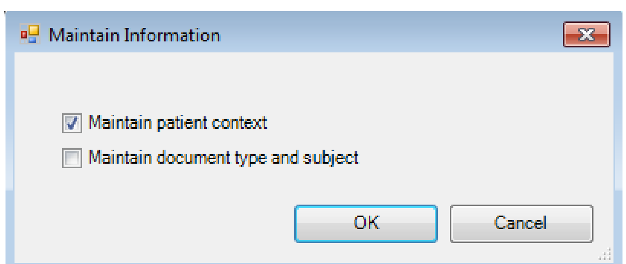
removed from the current work item and placed in a new work item, which will be processed later.



3. Process the current item by selecting the appropriate **Document Type** from the dropdown list and update the status to **Complete**.

4. Click the  button in the lower left corner.

5. The **Maintain Information** window will appear. If the documents are for the same patient, then select **Maintain Patient Context,** if the next document type is also the same, select **Maintain Document Type and Subject.** Click **OK**.



NOTE 1: If the next document is for a different patient, *unselect* the **Maintain patient context** checkbox and follow the steps outlined in Link a Document to a Patient/Encounter to link to a different patient/encounter.

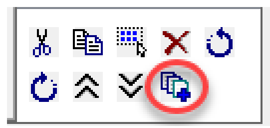
NOTE 2: If the next document is a different type, *unselect* the **Maintain document type and subject** checkbox. In the **Add/Modify Work Item** window, select the appropriate **Document Type**.

6. Continue to split documents until all the documents are processed.
7. Click **OK** to close the **Add/Modify Work Item** screen.
8. The referral will drop off the clinic's WQM queue.

Troubleshooting Tips in Work Queue Monitor (WQM)

Q: Where do I see the split icon  in Work Queue Monitor (WQM)?

A: Double click on a fax received in WQM to open. Check on the bottom right-hand side of the screen of the opened document to find the split icon.



Q: Can I create a Pre-outpatient or Pre-recurring encounter from WQM?

A: No, you can only create **Referral** encounter in WQM.

Q: Can you route a document to another LGH/SGH outpatient clinic?

A: Yes, double click to open the fax →select a location in **Queue Routing** →Click **OK** → select **Yes** to send the document without linking it to a patient → click **Route** on the toolbar to reroute the document.

Q. What if I accidentally deleted a fax from my queue?

A: Once you delete a fax from your clinic's queue, it **permanently** removes it from the queue. You will need to request it to be re-faxed from where it came from.

Q. What do I do if I unintentionally indexed a fax to a wrong patient's chart?

A: You will need to contact **Health Records Management** to remediate the issue.

Q. What if I selected a wrong encounter (instead of creating a Referral encounter) during indexing to a patient's chart?

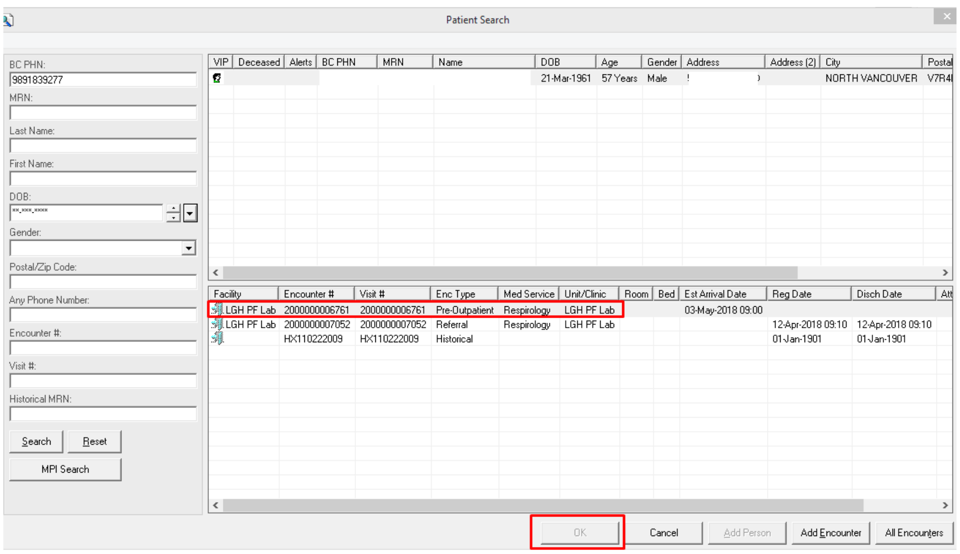
A: In PowerChart, all indexed documents appear right across the board irrespective of the type of encounters you select. So, if you select a wrong encounter instead of creating a **Referral** encounter during indexing, you will need to go to **Referral Management Conversation** in PMOffice to create a **Referral** encounter and set it to the correct status.

Q. What do I do if I cannot find the patient that I just created a referral for in WQM?

A: Go to **Referral Management Worklist** in PMOffice to find all the referrals that are open for your clinic. You will be able to see your patient on this list.

Q: Why can't I select the existing pre-outpatient or referral encounter after I searched for my patient (encounters and Ok buttons are all dithered out)?

A: WQM window has been idle for longer than 30 mins. Log out and log back in to the application again to be able to select an existing encounter.

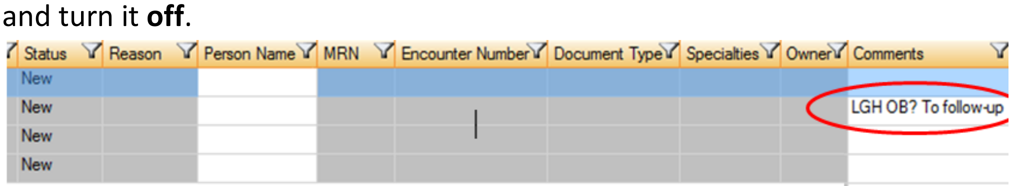


Q: Where do I find the document that disappeared from my clinic's WQM queue? (e.g. during the splitting process for indexing document to the patient's chart)

A: Check the **Unknown Queue** in WQM to find your document and route it back to your clinic's queue.

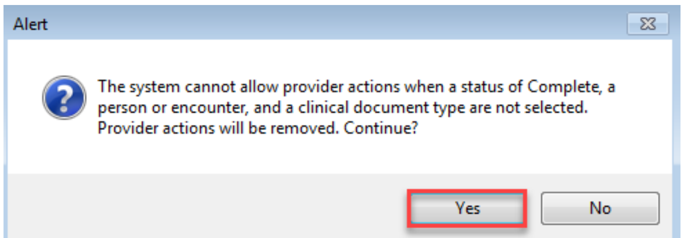
Q: How do I quickly add a comment in WQM?

A: Click on the drop-down list of Edit Mode  and select **On**. Click on the **Comment** field to add a comment (fields that are marked as white are editable). Click on the **Edit Mode** again and turn it **off**.



Q: During splitting a multi-page document to be indexed to multiple patients, an alert message appears just after indexing a set of selected pages prior to viewing the next set of pages to be split/indexed for the next patient. What actions need to be taken?

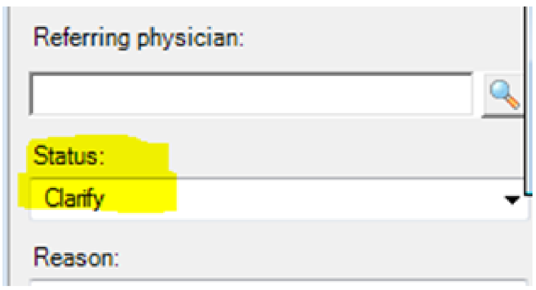
A: Check that the indexing steps of the first set of split pages has been done correctly (i.e. patient encounter has been selected and fields completed: **Document Type**, **Priority**, **Status**, **Performing Provider**). If so, click **Yes** in the **Alert** box below.



Appendix A – Work Queue Monitor (WQM)

Status Updates

CPDI Work Queue Monitor allows user to select a status on a work item. Status can drive workflow from rule based routing. You cannot add or remove values from this field.



The Various **Statuses** are listed below:

a. **New:** Only new items entering WQM are displayed in a new status.
b. **In Process**: This status is generated by the system when a work item is opened in Work Queue Monitor or Scheduling.
c. **Available:** The system automatically changes a status from **New** to **Available** when the work item has been opened by the End User. End Users can also select this status in the **Add/Modify** dialog box.
d. **Clarify:** This status can be selected in the **Add/Modify** dialog box, but it requires a **Status Reason**.
e. **Faxed:** The system generates this status when a work item is faxed outbound.
f. **Complete**: Once this status is selected in the **Add/Modify** dialog box, and you click **OK**, the item is released to the patient's record. The item is no longer viewable in WQM.
g. **Canceled:** When you select this status, a **Status Reason** is required.