





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.

CPDI Work Queue Monitor]	
Task Work Item View Help		
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LGH Cast Clinic LGH Chemo LGH EEG LGH IF	OP LGH Ped Asthma LGH PF Lab LGH Rehab Services LGH Trauma L	ess LGH Wound Ostomy SGH Ambulatory SGH Ph
Date/Time Papsed Time Status 11-Oct-2017 17:39 60 d 16 hr Available 11-Oct-2017 17:39 60 d 16 hr Available 11-Oct-2017 17:39 60 d 16 hr Available 11-Oct-2017 17:39 60 d 16 hr Available	Reason V Person Name V M	rilish Columbia Antonatal Record Part 1
12-Oct-2017 09:12 60 d 0 hr Available 16-Oct-2017 10:43 55 d 23 hr Available 16-Oct-2017 11:56 55 d 22 hr Faxed	D Ga	All read and the second
16-Oct-2017 12:23 55 d 21 hr New 16-Oct-2017 12:25 55 d 21 hr Available 16-Oct-2017 12:29 55 d 21 hr Oarly	Insufficient information/Incomplete CSTSCHTEST, JOETRIAGE 70	Logical Number Velocity train Contraction Contreaction Contraction <t< td=""></t<>
16-Oct-2017 12:32 55 d 21 hr New 16-Oct-2017 12:52 55 d 21 hr New 16-Oct-2017 17:07 55 d 17 hr Available		Financial Extension - Tributer -
16-Oct-201717:11 55 d 17 hr in Process		Non-Strageny ms (arcs): Non-Strageny ms (arcs): Bindy bindy
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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.

🚽 Order Work Queues	
CST Test Queue	
Unknown Queue	
LGH Breath Prog	
LGH Cardiology	
LGH Cast Clinic	
LGH IBOP	
LGH Ped Asthma	
LGH PF Lab	
LGH Rehab Services	
LGH Trauma	
LGH Vasc Access	
LGH Wound Ostomy	
SGH Ambulatory	
SGH Physiotherapy	
LGH Cardiac Home	
LGH OCC MDC	
SCH Opening	
LGH JBAC/BASC/BAN	
Carronales na accordance	

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.

	🖳 Order Work Queues
Top Up	LGH JRAC/RASC/RAN CST Test Queue Unknown Queue LGH Breath Prog LGH Cardiology LGH Cardiology LGH Cardiology LGH Pet Clinic LGH EEG LGH IROP LGH Ped Astrona
Down Bottom	LGH PF Lab LGH Rehab Services LGH Trauma
	LGH Vasc Access LGH Wound Ostomy SGH Ambulatory LGH Cardiac Home LGH OCC MDC WHC Cast Clinic SGH Oncology

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.

Date/Time V Bapsed Time V Status V Reason V Pen	on Name V MRN	Y Encounter Number	V Document Type	V Specialties	V Owner V	Comments	Via
19-Oct-2017 15:06 ,49 d 19 hr New	8	Open Route Fax					
		Set Status to 🔹	1				
		Combine	1				
		Unlock					
	35	Delete					

3. Click Yes.

Delete Wo	rk Item
<u>^</u>	Are you sure that you want to permanently delete the selected work items?
	Yes No

NOTE: The Delete function **<u>permanently</u>** 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.

🚯 CPDI Work Queue Monit	or							
Task Work Item View	Help							
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CST Test Queue LGH Breat	h Prog LGH Cardiolog	JY LGH EEG LGH	H Rehab Services LGH	HPed Asthma LGH Card	liac Home LGH Vasc	Access LGH Trai	uma LGH Chemo	LGH OCC MI
Date/Time 🛛 Elapsed	Time 🏹 Status 🏹	Reason 🔽 Perso	on Name 🔽 MRN 🛛	Encounter Number 🛛	Document Type 💙	Specialties 💙 Ov	wner 🏹 Comment	s 🛛 Last Co
2018-Feb-01 08:22 127 d 7	hr Available							
2018-Feb-01 08:23 127 d 6	hr Available				1			
2018-Feb-01 08:23 127 d 6	hr Available							_
2018-Feb-01 08:24 127 d 6	hr Available							
2018-Feb-01 08:24 127 d 6	hr Available							
2018-Feb-01 08:24 127 d 6	hr Available							

- 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.

	Task Work Item	View Hel	lp								
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(ST Test Queue	GH Breath Prog	LGH Cardiolo	gy LGH EEG	LGH Rehab Serv	rices LGH	Ped Asthma LGH Card	liac Home LGH Vaso	Access	Trauma LGH Chemo LGH	OCC MD
	Date/Time 🏾 🏹	Elapsed Time	V Status V	Reason V	Person Name 🛛	MRN 🍸	Encounter Number 💙	Document Type 💙	Specialties 💙	Owner	Y
	2018-Feb-01 08:22	127 d 7 hr	Available								
	2018-Feb-01 08:23	127 d 7 hr	Available							Train, ClerkAdvanced-Sched	uling1
	2018-Feb-01 08:23	127 d 7 hr	Available								

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.

CPDI Work Queue Monitor						
Task Work Item View Help						
🔄 😂 🛊 🐵 🔮 🖊 📑 💊	-	-				
CST Test Queue LGH Breath Prog LG	GH Cardiology LGH EEG	LGH Rehab Service	es LGH Ped Asthma LGH C	ardiac Home LGH Vasc	Access LGH Trauma	LGH Chemo LGH OCC MI
Date/Time V Elapsed Time V	Status 💙 Reason 💙	Person Name 🛛 🛛	MRN 🏹 Encounter Number	V Document Type V	Specialties 🔽 Owner	Comments V Last Co
2018-Feb-01 08:22 127 d 7 hr	Available					
2018-Feb-01 08:23 127 d 6 hr	Available			h.		
2018-Feb-01 08:23 127 d 6 hr	Available					
2018-Feb-01 08:24 127 d 6 hr	Available					
2018-Feb-01 08:24 127 d 6 hr	Available					
2018-Feb-01 08:24 127 d 6 hr	Available					

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:

- Ι. 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.

Add/Modify Work Item				- • ×
Task View WorkItem Help				
Fax	³ atient Name: MRN:	DOB: Age:	Encounter Type: FIN:	
Location:				Page 1

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

Facility/sender address:	
Pac information To: Default Station Fax number: Re:	From: Train, Clerk-Advanced-Scheduling 1 Pages (including this cover page): [System-generated] Dete: 2018-Jun-12
Comments:	v Add
Include cover page	

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

Enter the fax number including the area code with no spaces or dashes.

- 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.

Fax Facility/sender address:	
Fax information To: Default Station v Fax number: 6047881111 Re:	From: Train, ClerkAdvanced-Scheduling1 Pages (including this cover page): [System-generated] Date: 2018-Jun-12
Comments:	▼ Add
V Include cover page	Fax Cancel

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.
- With the referral open in the Add/Modify Work Item, click on the Select Patient icon.
 2
- 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).
- If you have found the correct patient, click only <u>ONCE</u> on their name, select the Encounter for the patient's <u>current visit</u> and select OK. Do <u>not</u> create a new Encounter.

HN:	VIP	Deceased	Alerts	BC PHN	MBN	Name	DOB	Age	Gender	Address
	2	No	Interpreter Required	9878263312	700001660	CSTSCHEMPI, NANCY	01-Jan-2012	5 Years	Female	2454 hfghgf
	Ø		Interpreter Required	9876874312	700003998	CSTSCHEMPI, PETE	02-Feb-2000	17 Years	Male	105 E Kent
	Ø			9876788282	700005017	CSTSCHEMPI, MICKEY	01 Jul-1997	20 Years	Male	1111 Howe
Mama	Ø		Process Alert	9876706228	700006538	CSTSCHEMPI, JOHNNY	01-Sep-1999	18 Years	Male	11111 hom
nkampi	2			9876541429	700007353	CSTSCHEMPI, JRAC	11-0ct-1943	74 Years	Male	590 West 8
chempi	2		Interpreter Required	9876527087	700007576	CSTSCHEMPI, PAULJOSE	PH 02-May-1950	67 Years	Male	9846 HIGH
Name:	8			98/65043/3	700007682	USTSCHEMPI, JEFF	23-Uct-1985	32 Years	Male	5588 Donal
	2			9876488326	700007891	CSTSCHEMPI, RANUY	Ub-Nov-19/7	40 Years	Female	900 E. 29th
	2			38/648/5/8	700007926	USTSCHEMPI, WALKER UI	NE 074N0V-2010	7 Tears	Undirferentiated	3300 Z 0MD
ler.										
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al/Zip Code:					,	1				
	Facil	ity	Encounter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room Be	d Est Arrival Dat	e Regl
Phone Number:	- Mire	GH Rehab OP	700000015175	700000001517	5 Pre-Outpati	ient Occupational Therapy	LGH Rehab OP		24-Nov-2017	(4:00
Tono Hombor.	SIL	GH RAN	700000013132	700000001319	B Referral	Neurology	LGH RAN			
	3110	GH Rehab OP	700000015484	70000001548	Pre-Recurri	ing Occupational Therapy	LGH Rehab OP		27-Nov-2017	3:00
unter #:	San Contraction	iH Uhemo	700000015242	70000001524	2 Referral	Medical Uncology	LGH Chemo			00.11
	Struct	ah ran	700000013101	70000001316	3 Referral	Neurology	LGH RAN			06-N
#:	-									
rical MRN:										

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**.

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Task Work It	em View	Help										
CST Test Queue	GH Breath Prog LC	GH Cardiolog	y LGH EEG	LGH Rehab Serv	ices LGH	l Ped Asthma LGH (Cardiac Home LC	GH Vasc Acc	cess LGH Tr	auma LGH Chemo LGH OCC N	DC WHC Ca	ast Clinic LG
Date/Time V	Elapsed Time 🛛	Status 🏹	Reason 🍸	Person Name 🛛	MRN 🗅	Encounter Number	V Document T	/pe 🔽 Spe	ecialties 🍸	Owner	Comments	s 🛛 Last Co
25-Apr-2018 14:15	22 d 0 hr	Available								TestSCH, ClerkAdvanced-Scheduli	ng	
25-Apr-2018 14:17	22 d 0 hr	Available								TestSCH, ClerkAdvanced-Scheduli	ng	
26-Apr-2018 06:37	21 d 8 hr	New										
26-Apr-2018 06:37	21 d 8 hr	New										
01-May-2018 08:16	16 d 6 hr	New										
01-May-2018 08:17	16 d 6 hr	New										
14-May-2018 09:21	3 d 5 hr	New										
15-May-2018 09:27	2 d 5 hr	New										
15-May-2018 09:28	2 d 5 hr	New										

- **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.

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Task	Work It	em View	Help												
CST Test (Queue L(GH Breath Prog LC	GH Cardiolog	gy LGH EE	G LGH Rehab Se	vices l	.GH Ped Ast	thma LGH C	ardiac Home	LGH Vaso	c Access LG	iH Trauma	LGH Chemo LGH OCC MD	C WHC Cas	t Clinic LG
Date/Tim	ne V	Elapsed Time 💙	Status 🖌	Reason	Person Name	MRN	Y Encou	nter Number	V Document	Type 🖌	Specialties	V Owner	2	Comments	V Last Co
25-Apr-20)18 14:15	22 d 0 hr	Available									TestSC	H, ClerkAdvanced-Scheduling		
25-Apr-20	18 14:17	22 d 0 hr	Available									TestSC	H, ClerkAdvanced-Scheduling		
26-Apr-20	18 06:37	21 d 8 hr	New												
26-Apr-20	018 06:37	21 d 8 hr	New												
01-May-20	018 08:16	16 d 6 hr	Available									TestSC	H, ClerkAdvanced-Scheduling		_
01-May-20	018 08:17	16 d 6 hr	Available									TestSC	H, ClerkAdvanced-Scheduling		
14-May-20	018 09:21	3 d 5 hr	New												

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.

8 16 8 6	편 🗶 👍 🕅	à •		-	•								
Task Work It	em View	Help											
CST Test Queue L	GH Breath Prog I	GH Cardiok	gy LGH E	G LGH Rehab S	ervices 1	GH Per	Aathma LGH (andiac Home LGH	Vasc Ac	cess LGH	Trauma LGH Onemo LGH OCC M	DC WHC	Cast Clinic
Date/Time	Bapsed Time	Satur	Reason	Person Name	V MRN	VE	counter Number	V Document Type	Vs	eciaties	/ Owner	Commen	ta V Lar
25-Apr-2018 14:15	22 d 0 hr	Available	-								TestSCH, OlerkAdvanced-Schedulin	9	
25-Apr-2018 14:17	22 d 0 hr	Available									TestSCH, OerkAdvanced-Schedulin	0	
26-Apr-2018 06:37	21 d 8 hr	New											
26-Apr-2018 06:37	21 d 8 hr	New											
01-May-2018-08-16	150512	Available	5								TestSCH: OerkAdvanced-Schedulin	a :	
01-May-2018 08:17	15 d 6 hr	Available									TestSCH. OerkAdvanced-Schedulin	a l	
14-May-2018 09-21	3d5hr	New	-		_	-			-				_

3. Click Merge.

8					Comi	bine D	ocuments				-	• ×
Order	the documents for me	irge:										
	Date/Time	Bapsed Time	Status	Reason	Person Name	MRN	Encounter Number	Document Type	Specialties	Owner		
1	01-May-2018 08:16	16 d 6 hr	In Process							TestSCH, ClerkAr		
2	01-May-2018 08:17	16 d 6 hr	In Process							TestSCH, ClerkAr		Un
												Down
<									R	> Merge		Cancel

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** 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. **s**elect 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.**

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Task Work Iten	n View H	elp							
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CST Test Queue I	.GH SURG AII C	ther Se	ervices	LGH SURG O	R Desk SC	GH SURG C	OR Desk	Unknow	n Queue
Date/Time V	Elapsed Time	V St	atus 🏹	Reason V	Priority 💙	MRN V	Person N	lame 🍸	Encounter
17-Jul-2018 13:31	8 d 22 hr	Av	ailable		Now				
17-Jul-2018 13:31	8 d 22 hr	Av	ailable		Now				

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**.

Print	X
Printer	
Name: LGAT-057 on nsprtp01.vch.ca (fi	rom LD024 Properties
Status: Ready	
Type: Citrix Universal Printer	
Where: LGH - LGAT Bldg 2nd Floor West	t Printer Room
Comment: Auto Created Client Printer LD024	814
Print range	Copies
@ All	Number of copies: 1
C Pages from: 1 to: 4	
C Selection	123 123 M Collate
	OK Cancel

Link a Document to a Patient/Encounter

- With the referral open in the Add/Modify Work Item, click on the Select Patient icon.
 2
- 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.

😒 Patient Search												
(i) x You have not entered a valid combination	ion to s	earch on the I	loreign system.								Close	
EC PHN:	MP	Deceased	Alets	BC PHN	MEN	Nane		008	Age	Gender	Add	e00
	2	No	Interpreter Required	9878263312	700001660	CSTSCHEMPI, NANO	Y	01-Jan-2012	5Years	Female	2454	Nghgh
MRN:	2		Interpreter Required	9876874312	700003998	CSTSCHEMPI, PETE		02Feb-2000	17 Years	Male	1051	KerkA
	8		Descent lint	9076700292	700005017	CSTSCHEMPI, MOU	EY .	01-Jul-1997	20 Years	Male	1111	Howe S
Last Name:	ě		Process Men	9070541429	200002353	CSTSCHEMPLUBAC		11/0-41943	74 Years	Main	5901	Alant Re-
ostuchempi	0		Interpreter Required	9876527087	700007576	CSTSCHEMPI, PAUL	JOSEPH	02-May-1950	67 Years	Male	9846	HIGHLA
First Name:	2			9876504373	700007682	CSTSCHEMPI, JEFF		23-0xt-1985	32 Years	Male	5588	Donald
	2			9076400326	700007991	CSTSCHEMPI, RAND	217	06-Nov-1977	40 Years	Female	9001	E. 29h.A
D08:	0			9076407570	700007926	CSTSCHEMPI, WALK	CER ONE	07-Nov-2010	7Years	Undifferentiated	3355	Zonbie
Gender.												_
	20							_				-
Postal/Zip Code:					1						_	
	Facil	ły	Encounter #	Vieit II	Enc Type	Med Service		n//Cinic	Room Br	nd Est Anival Dat	e	RegDa
Any Phone Number:	20	SH Rehab OF	· 200000015175	7000000015175	Pre-Outpat	ent Occupational Th	verapy LI	GH Rehab OP		24-Nov-2017	14:00	
	30	SH Rubah OF	200000015634	70000001519	Performinal Performinal	Neurology Decemptional Th	Lineare Li	GH Rahah OP		27.May 2017	8.00	_
Encounter R	30	SH Cheno	200000015342	2000000115242	Releval	Medical Drocky	w II	GH Cherro		271121-2017	0.00	
	4 0	SH RAN	200000013101	7000000013168	Refenal	Neurology	U	GH RAN				06-Nov
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MPI Search	1								_	_		•
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						ACan	C6	Bod Person	Add	Tuconates 1	d Enco	vivleis.

- 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 MUST be indexed with an appropriate Document Type and

Status so they can be stored appropriately in the Patient's chart.

- 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

Status:	
Complete	-
Available Canceled Clarify	
Complete	
Supplemental	

- 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

Status:
Clarify 🔹
Deserve
Reason:
Insufficient information/Incomplete
Insufficient information/Incomplete
Missing pages
Multiple report
Poor quality
Translation required

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

CPDI Work	Queue Monitor	23
?	Continue the submission without completing the requested fields? If you continue without completing requested fields, complications may occur. Document type Person	
	Yes No	

=

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.

🐔 Add/Modify Work Item					
Task View Work Item Help					
🚨 📧 📑 🎴 • 🔈 🎄 🚺 🕒 📄 🚳 🗈 💿					
	Patient Name: MRN: Gender:	DOB: Age:		Encounter Type: Encounter Number	
Location:	Vancouver CoastalHealth	ence	REGIONAL OR BOO	KING FORM	Page 1
	Hospital Use Only Required Fields	- Bolded Sections	Site: LGH Lionsgate		1 <u>-</u>
Subject E	MRN	Acct #	Booking Form Received Date	ORMIS #	Page 2
Priority: Routine	LEGAL SURNAME CSTPRODBCSN	FIRST NAME DAVID	MIDDLE NAME R	OR DATE	
Specializes : Queue Routing :	PHN 5859494944		Date of Birth (MM/DD/YYYY) 1970/12/20	Gender ☑ M □ F	Page 3
Last Contact	Address 111 Robson	City Van	Province Po couver BC V6	stal Code Country B 2A8 Canada	Page 4
Referring physician:	Telephone Home 604-499-4944	Work	Cell/Other	Local Contact Number	Page 5
Status:	Family Physician [Dr. Krista Peeks	Referral Date (MM / DD / YYYY)	08/01/2017	2 2
Complete	Referring Physician	Dr. Krista Peeks	First Consult Date (MM/DD/YYYY)	08/07/2017	Page 6
reason:	REFERRING PHYSICIAN		Surgery Decision Date (MM (DD / YYYY)	08/07/2017	rigeo
-		• 3 6 A ジ ジ % 愛 🗆 • 🖬 X % × 🤋	CANCER V Not Suspected	Suspected Droven	- <u>∦</u> № ≒×0 0 ≈ ×

- 3. Process the current item by selecting the appropriate **Document Type** from the dropdown list and update the status to **Complete**.
- 4. Click the Next 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, <u>unselect</u> the **Maintain patient context** checkbox and follow the steps outlined in <u>Link a Document to a</u> <u>Patient/Encounter</u> to link to a different patient/encounter.

NOTE 2: If the next document is a different type, <u>unselect</u> 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 ¹ 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 \rightarrow select a location in **Queue Routing** \rightarrow Click **OK** \rightarrow select

Yes to send the document without linking it to a patient \rightarrow click **Route** ^{\ddagger} 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.

S)						Patient Sea	rch									×
BC PHN:	VIP Decea	sed	Alerts	BC PHN	N MBN	Name	[00B	Age	G	ender	Address	Address (2)	City		Postal
MRN:	U						4	21-141-1301	57 166	13 M	ale	. ,		NUNI	H VANCOUVEN	V/D9
Last Name:																
First Name:																
DOB:																
Gender:																
Postal/Zip Code:	<											1				>
Any Phone Number:	Facility	E	Incoun	ter #	Visit #	Enc Type	Med Servi	ice Unit/C	linic F	Room	Bed	Est Arrival Date	Reg Date		Disch Date	Att
	LGH PF L	ab 2	200000	0006761	200000006761	Pre-Outpatient	Respirolog	J LGH P	FLab			03-May-2018 09:00	10.4 001	00.10	10.4 2010.00	10
Encounter #:	STLLGH PF L	.ao 2	4×1102	22009	H×110222009	Historical	Hespirolog	ру санте	r Lab				01-Jan-190	1	01-Jan-1901	10
Visit #:																
Historical MRN:																
Search Reset																
MPI Search																
	<						_									>
								OK		C	ancel	Add Perso	Add	<u>E</u> ncour	All Enco	unters

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**.

7	Status	Y	Reason	Y	Person Name	MRN	Y	Encounter Number	Document 1	Type 🖌	Specialties V	Owner	Comments V
	New												
	New							1				$\boldsymbol{<}$	LGH OB? To follow-up
İ	New							1					
ĺ	New												

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.

Referring physician:	
	4
Status:	
Clarify	۰
Reason:	

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.