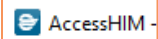


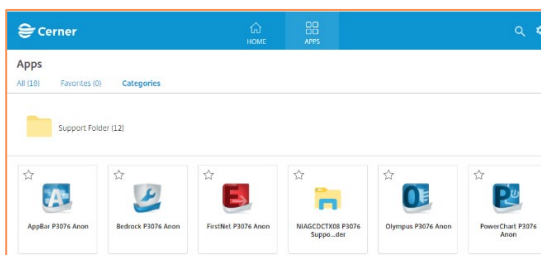


REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

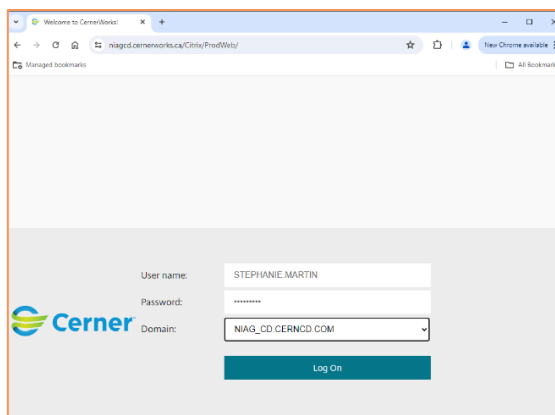
ALL HIM ROLES

HIM - Release of Information: Request Management Process Request (4A)

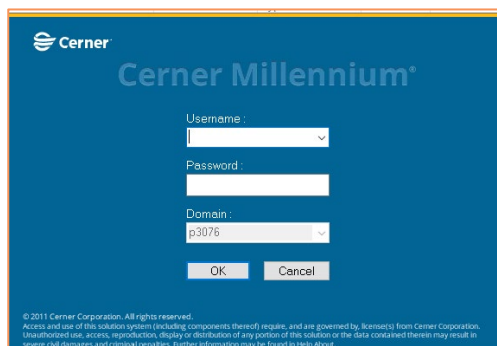
1. Log into the **Cerner Storefront** and select **AccessHIM** 



2. Log in **AccessHIM** as a **HIM-Tech**.



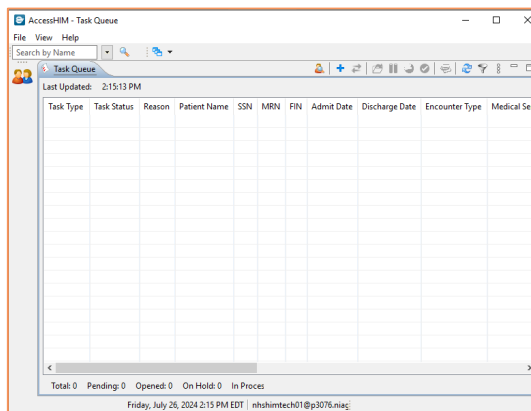
3. Open application on **Cerner Millennium** using your **log-in credentials for HIM**.



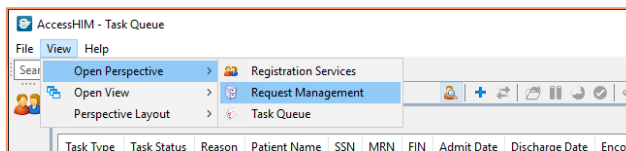


REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

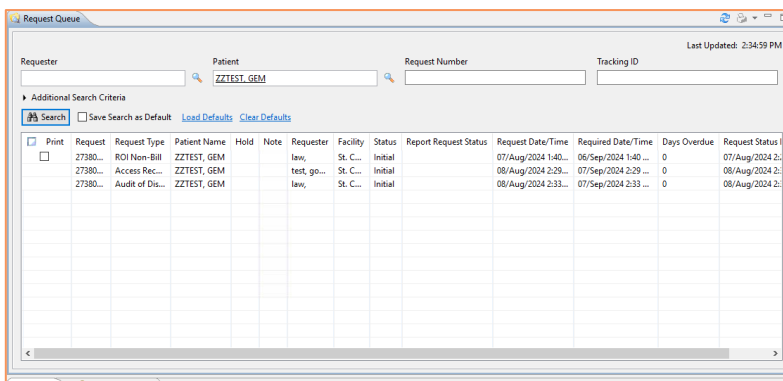
4. AccessHIM opens.



5. Open the Request Management Perspective by selecting View tab, click Open Perspective, the Request Management.



6. Navigate to the Request Queue tab and enter search criteria (Request Number, Requester, patient, Tracking ID). Click search.



Note: if choosing to search Patient or requester the will prompted a secondary window with advance search criteria if necessary.



REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

7. Highlight the appropriate request.

Request	Request Type	Patient Name	Hold	Note	Requester	Facility	Status	Report Request Status	Request Date/Time	Required Date/Time	Days Overdue	Request Status
27380...	ROI Non-Bill	ZZTEST, GEM			law, St. C...	St. C...	Initial		07/Aug/2024 1:40...	06/Sep/2024 1:40...	0	07/Aug/2024 2:...
27380...	Access Rec...	ZZTEST, GEM		test, go...	law, St. C...	St. C...	Initial		08/Aug/2024 2:29...	07/Sep/2024 2:29...	0	08/Aug/2024 2:...
27380...	Audit of Dis...	ZZTEST, GEM			law, St. C...	St. C...	Initial		08/Aug/2024 2:33...	07/Sep/2024 2:33...	0	08/Aug/2024 2:...

8. Navigate to the Request tab to review the request details.

Request Number: 273806356 | Request Type: ROI Non-Bill | Facility: St. Catharines Site | Requester: law

Patient Information
 Patient Name: ZZTEST, GEM
 Date of Birth: Sunday, January 1, 1950 | MRN: | Sex: Male
 Privacy Status: zzNot on File

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

Address Information

Print	Bill To	Mail To	Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City
<input type="checkbox"/>			Thir...	5357	test test	test test		Niagara F...

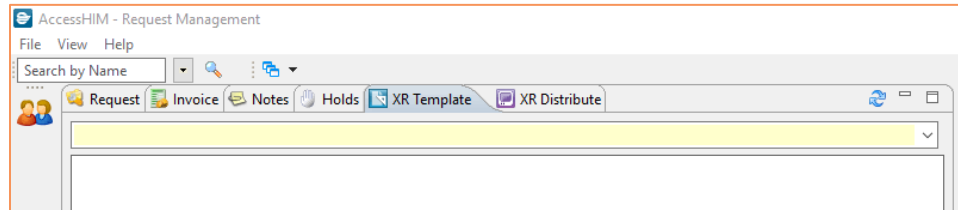
Accounting of Disclosure
 AOD Required
 Purpose: legal test | Description: log a request test test

Request Information
 Request Reason: Other | Implied Consent: | Request Status: Initial
 Rejection Reason: Chart Unavailable to Provide | Request Date: 07/Aug/2024 | Request Time: 1:40 PM
 Duplicate Request | Required Date: | Required Time: |

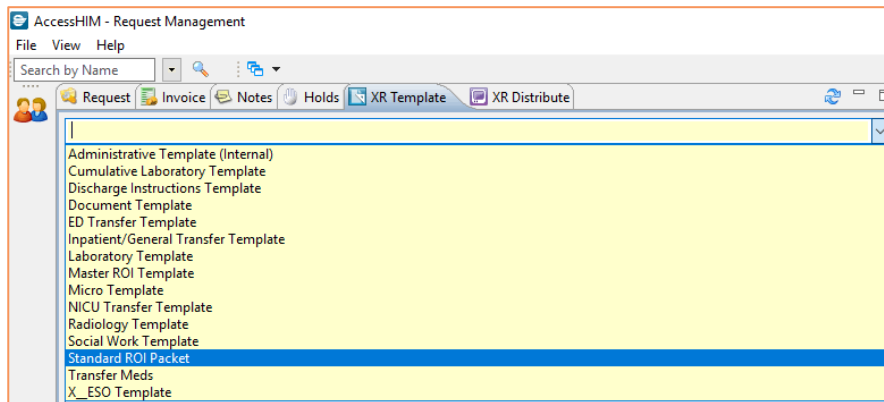
REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

9. Click on the **XR Template** tab.

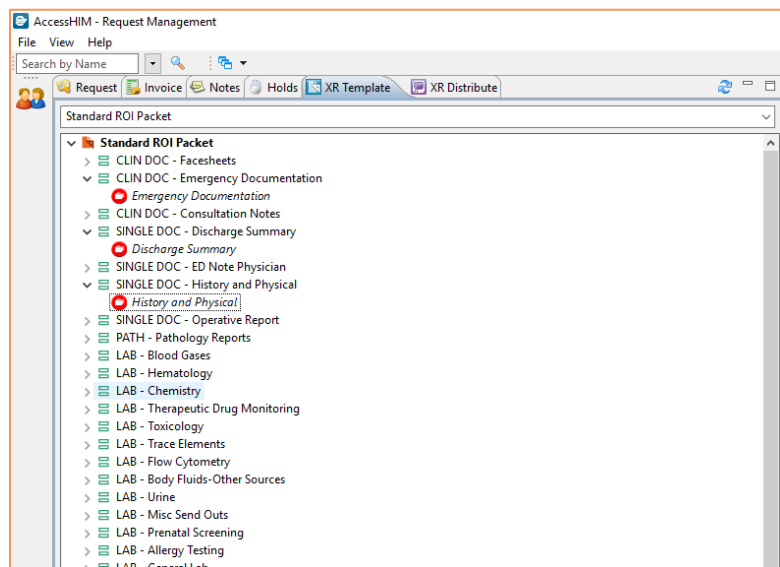


10. Select the appropriate **XR template**.



Note: *Templates are based on position security. Users can set a default in Request Management/Template Preferences.*

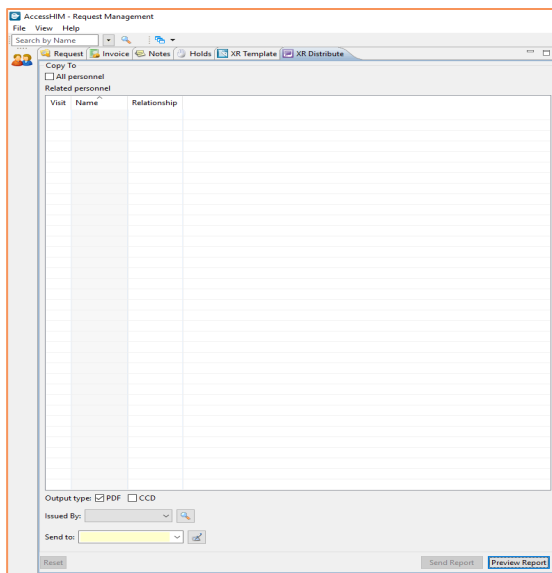
11. Select individual sections (if applicable).





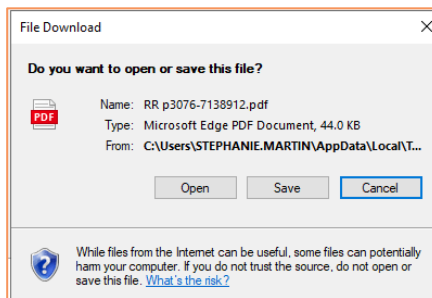
REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

12. Select the **XR Distribution** tab and click **Preview Report**.



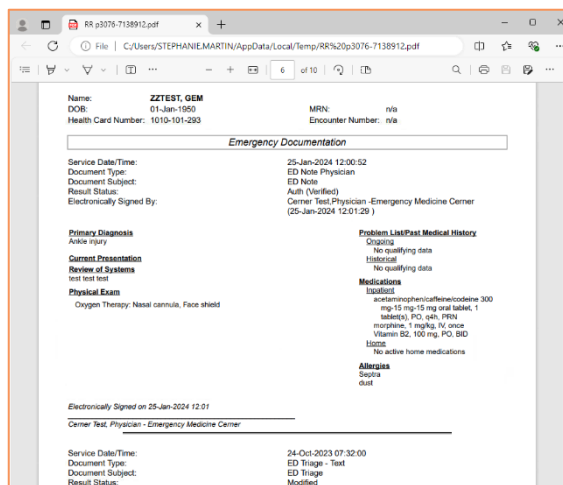
13. Click **Open** to preview report only.

Note: AVOID PRINTING OR SAVING CHARTS THROUGH THE PDF READER, AS IT REMOVES THE AUDIT TRAIL NEEDED FOR THE DISCLOSURE REPORT.



Clinical Reporting- Report request

Note: Default Clinical Reporting settings are Encounter-level scope and Verified. Users can customize these defaults if needed.





REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

- Click the **modify request icon** at the top of the screen, then update the **Request status** to **“Waiting for Pickup.”** (or as applicable)

The screenshot shows the 'AccessHIM - Request Management' window. The 'Request Information' section is expanded, and the 'Request Reason' dropdown menu is open, showing the following options: Canceled, Complete, Completed - Expedited, Completed Over the Time Extension, Completed - Partial Access Provided, Completed with Extension, Complete - Fess Waived in Part, Complete - Fess Waived in Full, Initial, Processing, Rejected, **Waiting for Pickup**, and Initial. The 'Request Reason' is currently set to 'Other'.



REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

15. Select a **distribution method** from the **delivery method** drop-down menu.

Patient Name: ZZTEST, GEM MRN: _____
 Date of Birth: Sunday, January 1, 1950 Sex: Male
 Privacy Status: zz/Not on File

Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility	Attending P
ZZTEST, GEM						

▼ Paper Documents for ZZTEST, GEM
 ▼ Delivery Information
 Delivery Method
 Mail (selected)
 Certified Mail
 Courier
 Delivery of Subpoena Records
 DIVS/CD Courier
 E-Delivery
 Email with PHI
 Express Post
 Fax
 FedEx
 Mail
 On Site Audit
 Patient Portal
 Patient View Access Record
 SFTP
 USB
 USB Courier
 Walk-in/Pick-up

Billable Pre-Bill

Address 2: test test Street Address 3: Street Address 4: City: Niagara F...
 Description: log a request test test

16. Update the **Request Status** to **Complete** and click the **Save Request** icon.

AccessHIM - Request Management
 File View Help
 Search by Name

*Request Invoice Notes Holds XR Template XR Distribute

Patient Name: ZZTEST, GEM MRN: _____
 Date of Birth: Sunday, January 1, 1950 Sex: Male
 Privacy Status: zz/Not on File

Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility	Attending P
ZZTEST, GEM						

▼ Paper Documents for ZZTEST, GEM
 ▼ Delivery Information
 Delivery Method: Mail
 Billable Pre-Bill

▼ Address Information

Print	Bill To	Mail To	Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Thir...	5357	test test	test test		Niagara F...

▼ Accounting of Disclosure
 AOD Required
 Purpose: legal test Description: log a request test test

▼ Request Information
 Request Reason: Other Authorization Required Request Status: Complete (selected)
 Rejection Reason: Chart Unavailable to Provide Request Date: 07/Aug/2024
 Duplicate Request Required Date: 06/Sep/2024
 Harmful To Individuals/Others Days Overdue: 0

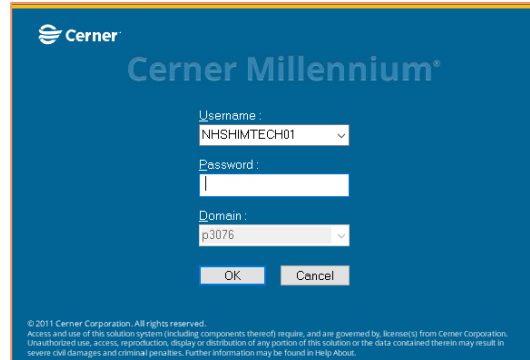
Request Status dropdown options:
 Complete
 Canceled
 Completed
 Completed - Expedited
 Completed Over the Time Extension
 Completed - Partial Access Provided
 Completed with Extension
 Complete - Fess Waived in Part
 Complete - Fess Waived in Full
 Complete - Rebuttal
 Rejected
 Waiting for Pickup



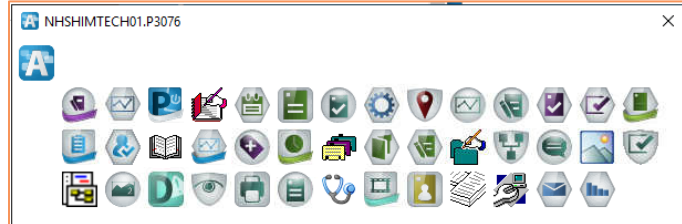
REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

HIM - RELEASE OF INFORMATION: REQUEST MANAGEMENT: REVIEW CHART(4B)

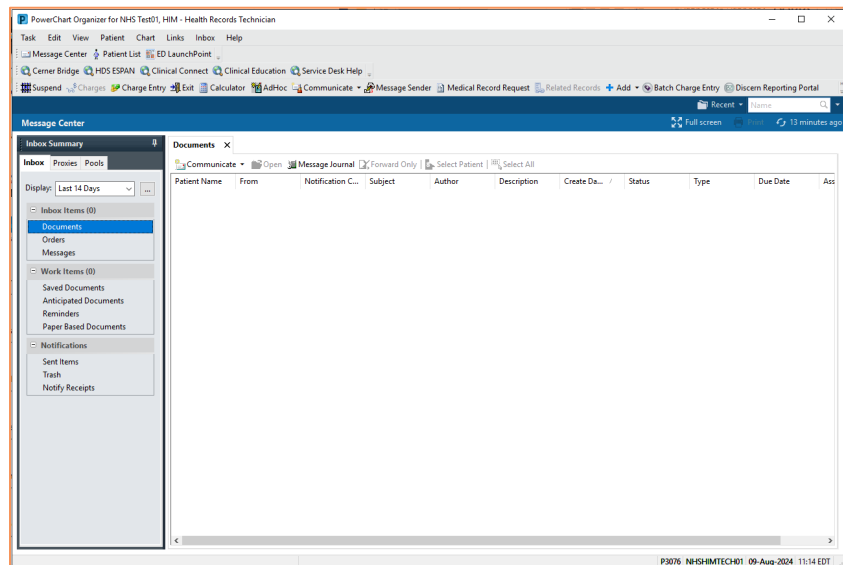
1. Sign in to get access to the **AppBar**.



2. AppBar opens. Select the **PowerChart.exe**  app.



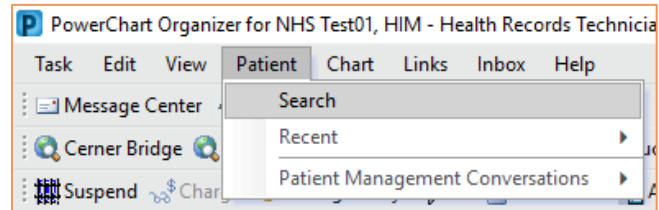
3. **PowerChart** Opens.



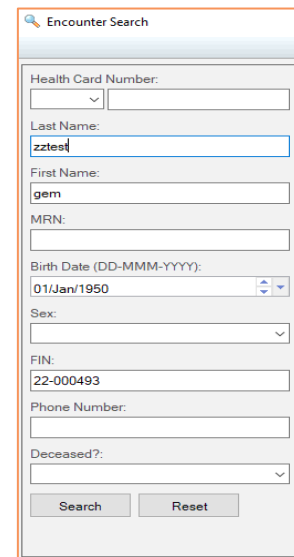
REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

- Click on the **patient tab** and select **search**.



- The Encounter Search Opens. Type in the patient's information (**DOB, Name, Encounter number, etc.**). Click **Search** or press **Enter**.



Encounter Search

Health Card Number: [dropdown]

Last Name:

First Name:

MRN:

Birth Date (DD-MMM-YYYY):

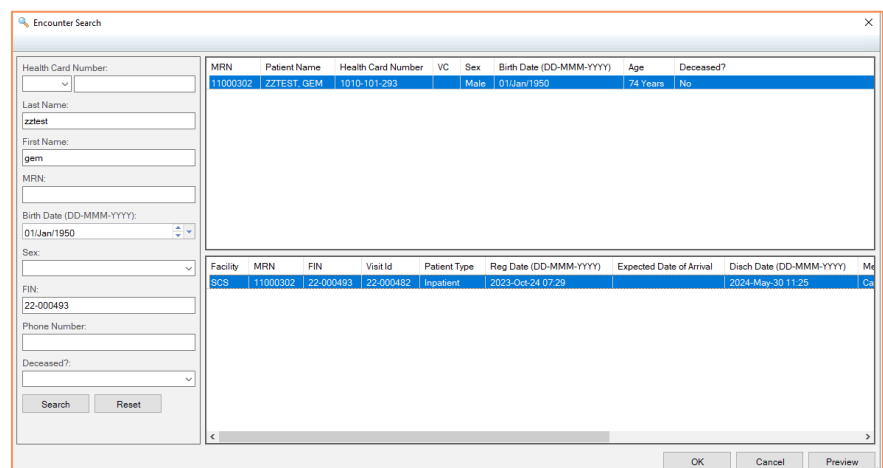
Sex: [dropdown]

FIN:

Phone Number:

Deceased?: [dropdown]

- Select the **patient** and **encounter** and click **OK**.



Encounter Search

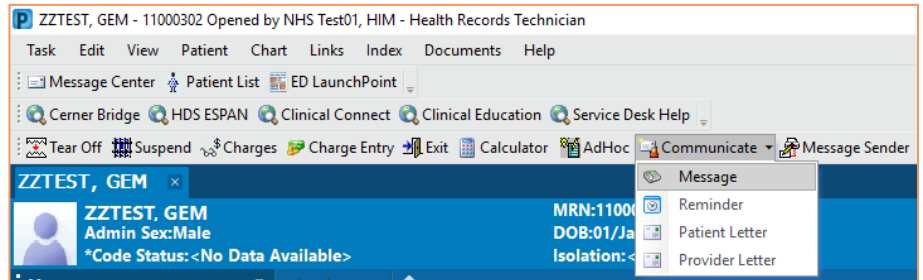
MRN	Patient Name	Health Card Number	VC	Sex	Birth Date (DD-MMM-YYYY)	Age	Deceased?
11000302	ZZTEST_GEM	1010-101-293		Male	01/Jan/1950	74 Years	No

Facility	MRN	FIN	Visit Id	Patient Type	Reg Date (DD-MMM-YYYY)	Expected Date of Arrival	Disch Date (DD-MMM-YYYY)	Md
SCS	11000302	22-000493	22-000482	Inpatient	2023-Oct-24 07:29		2024-May-30 11:25	Ca

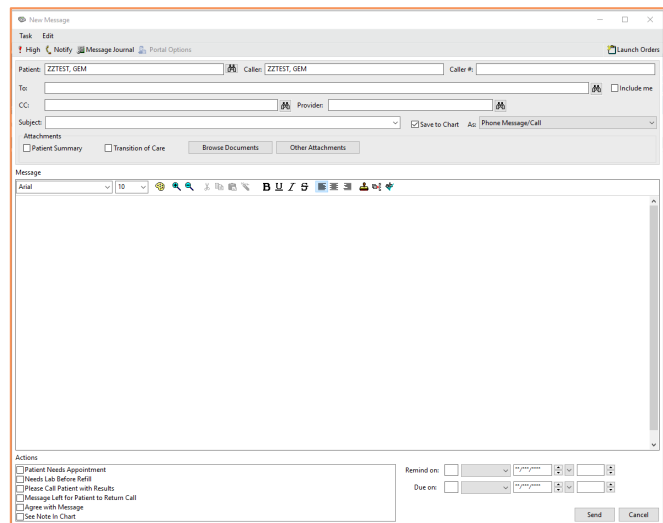


REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

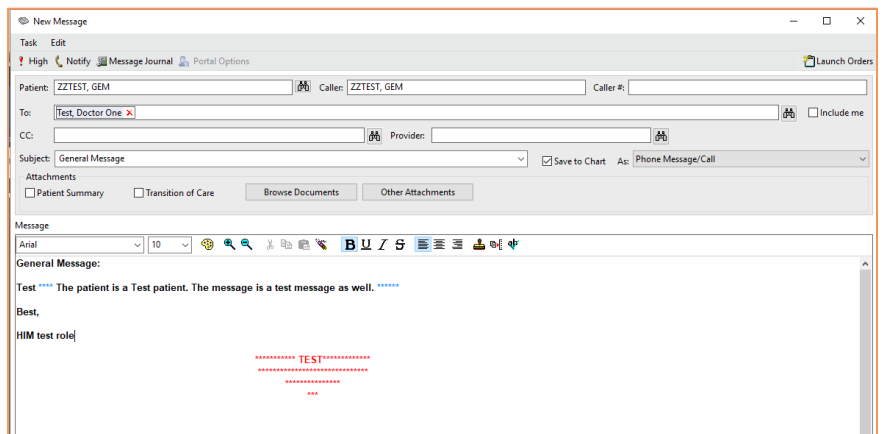
7. Click on the **Communicate** tab and select **message** from the menu.



8. **New Message** window opens. Enter the **Provider Name** in the **To** field or use the **Address book**.



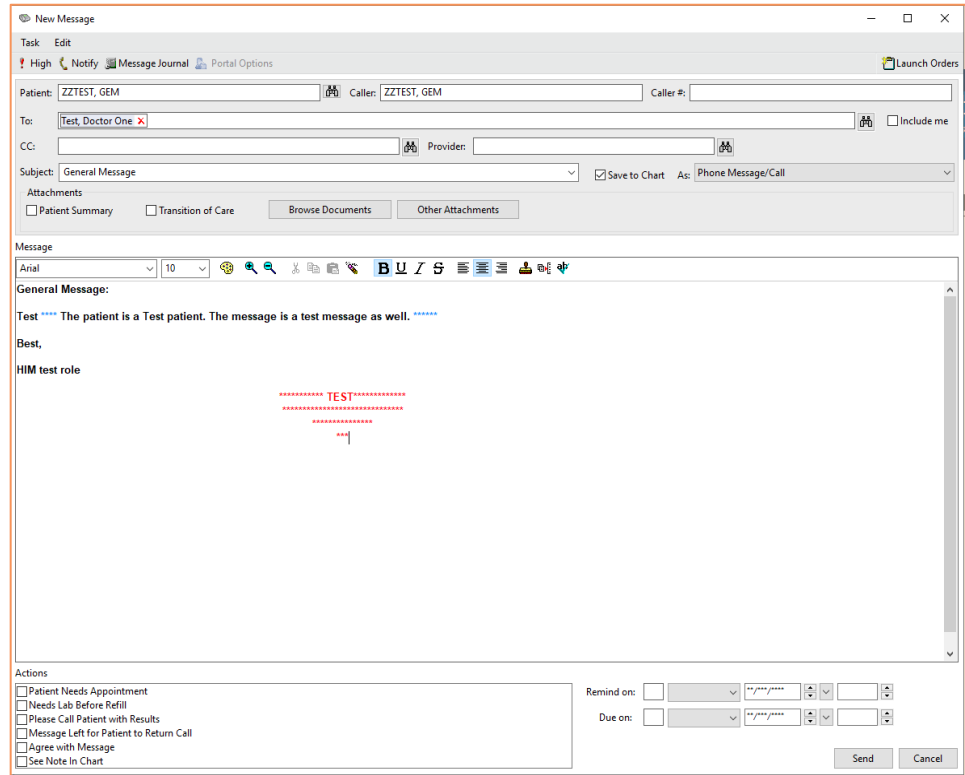
9. Select **General Message** in the **Subject** field and enter comments in the message body.



REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

10. Any documents awaiting **completion** or a **signature** can be attached to this message. Click **Send** when finished.



New Message

Task Edit

High Notify Message Journal Portal Options Launch Orders

Patient: ZZTEST, GEM Caller: ZZTEST, GEM Caller #:

To: Test, Doctor One Include me

CC: Provide:

Subject: General Message Save to Chart As: Phone Message/Call

Attachments: Patient Summary Transition of Care Browse Documents Other Attachments

Message

Arial 10

General Message:

Test **** The patient is a Test patient. The message is a test message as well. ****

Best,

HIM test role

***** TEST*****

Actions

Patient Needs Appointment

Needs Lab Before Refill

Please Call Patient with Results

Message Left for Patient to Return Call

Agree with Message

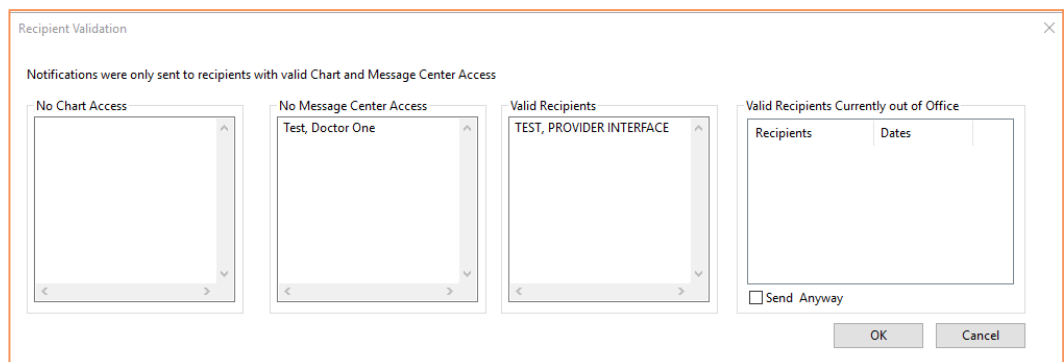
See Note in Chart

Remind on: [] [] [] [] [] []

Due on: [] [] [] [] [] []

Send Cancel

11. **Recipient Validation** window opens. **Verify** and click **OK** to send.



Recipient Validation

Notifications were only sent to recipients with valid Chart and Message Center Access

No Chart Access

No Message Center Access

Test, Doctor One

Valid Recipients

TEST, PROVIDER INTERFACE

Valid Recipients Currently out of Office

Recipients Dates

Send Anyway

OK Cancel

Note: the message will populate to the prescriber's Message Center. Follow-up with a phone call as needed, per policy.

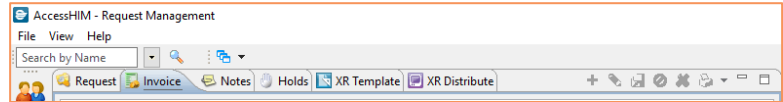


REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET

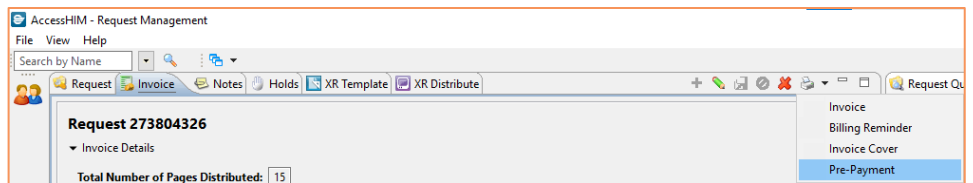
HOSPITAL INFORMATION SYSTEM (HIS)

HIM - RELEASE OF INFORMATION: REQUEST MANAGEMENT: INVOICE PRE-BILLABLE

1. Navigate to AccessHIM and click the Invoice tab.

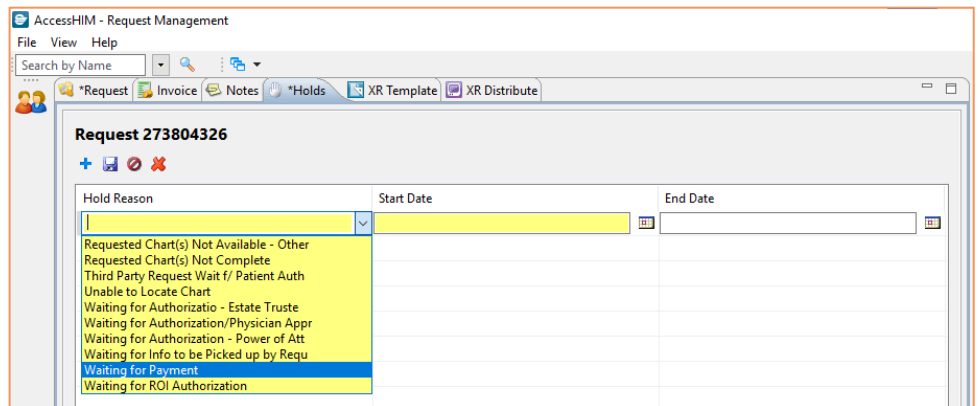


2. Select the down arrow next to the Print icon and select Pre-payment letter and invoice.

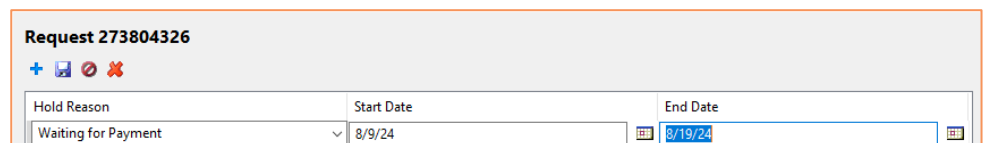


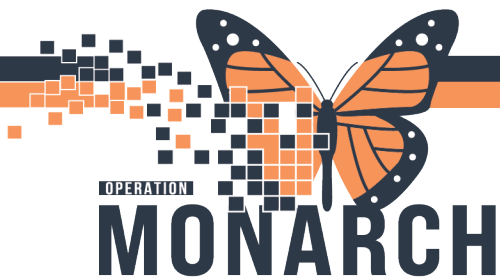
3. Send letters to requester.

4. Select the Holds tab and click Add Hold icon. Place the Request on Hold with hold reason "Waiting for payment."



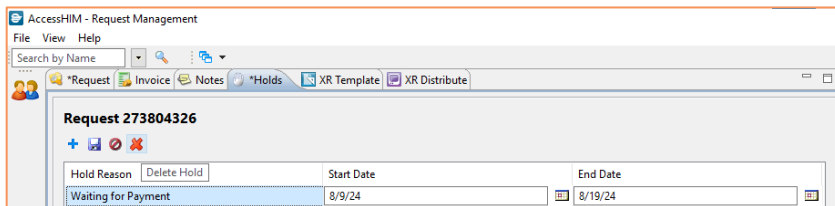
5. Select the Start Date and End Date the click Save.



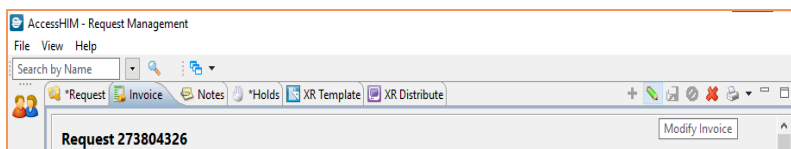


REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

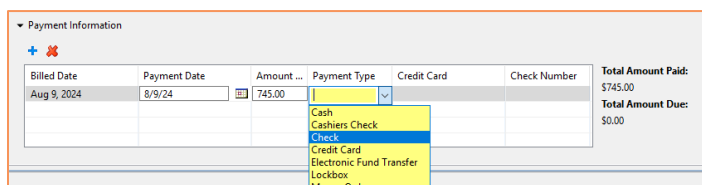
- If the payment has been received, remove the Hold on the Request.



- Select the Invoice tab and click the modify invoice icon. Click add Payment and update Amount Paid.

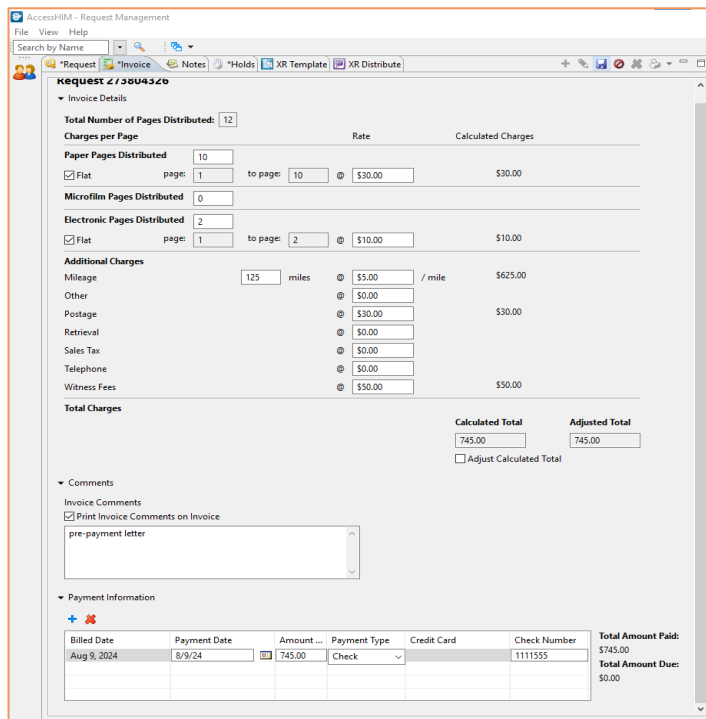


- Select Payment Type and if applicable select Credit Card type or enter Check.



Note: Finance Department then send the receipt of payment to the HIM ROI department. Then HIM ROI Department send the receipt back to the finance department.

- Click Save Invoice to complete.

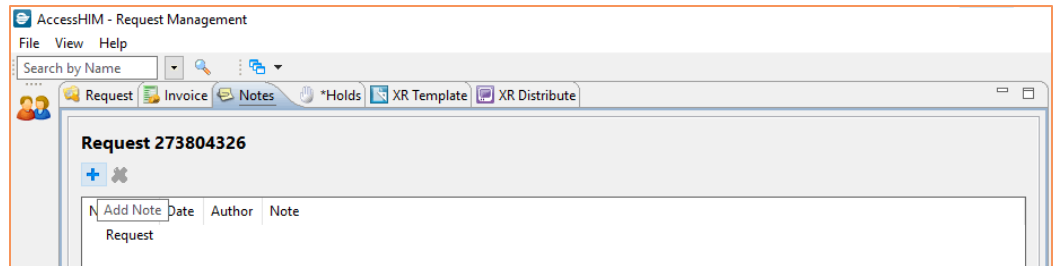




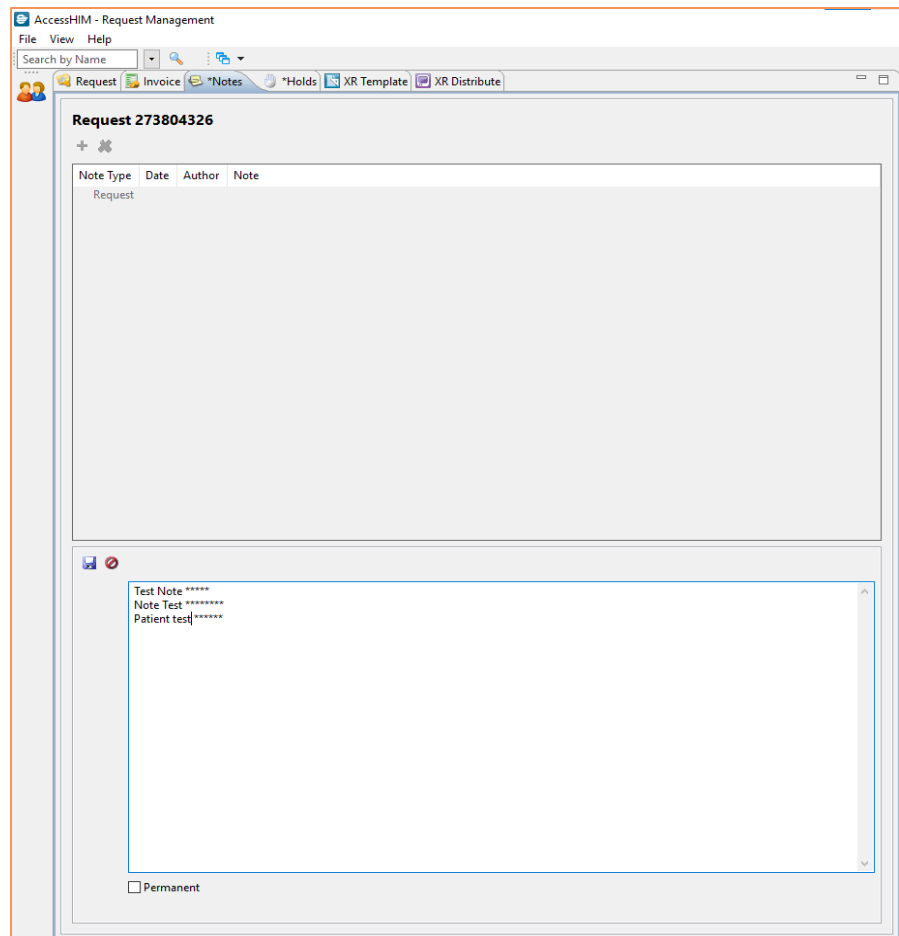
REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

HIM - RELEASE OF INFORMATION: REQUEST MANAGEMENT ROI HOLD(4E)

1. In AccessHIM select the Notes tab and click Add Note.



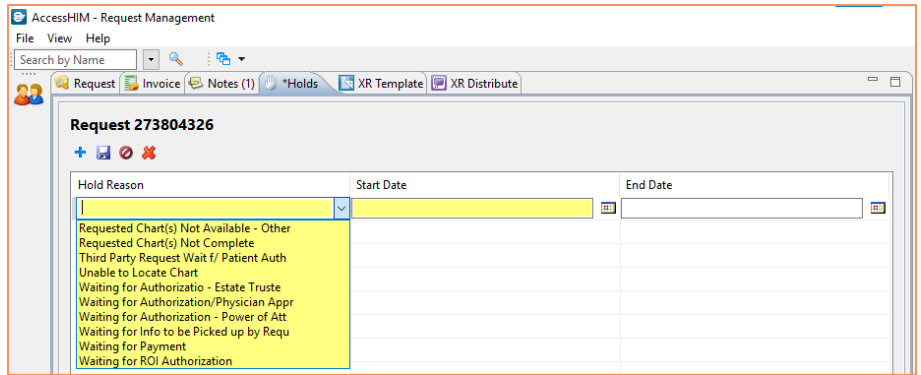
2. Enter Comments below. Click the save Notes icon.



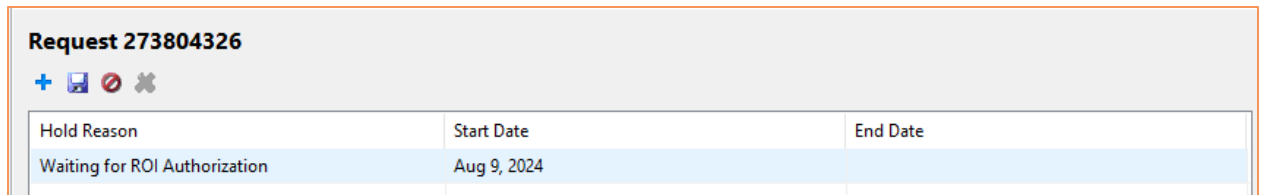


REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

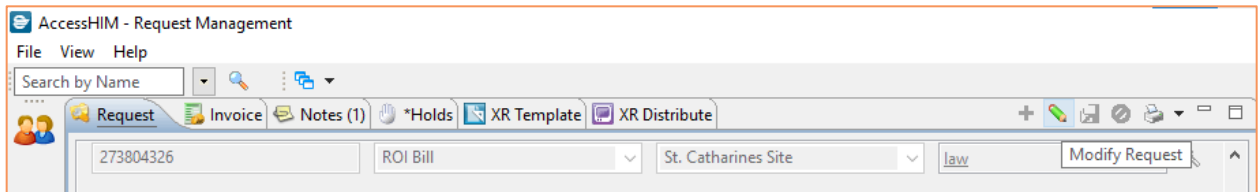
3. Select the Holds tab and click Add Hold.



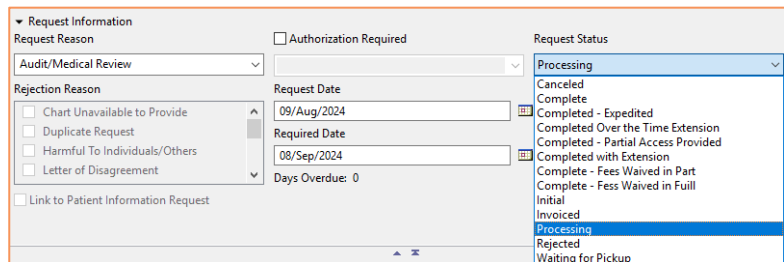
4. Select the Holds reason and enter a Start Date then click Save Request.

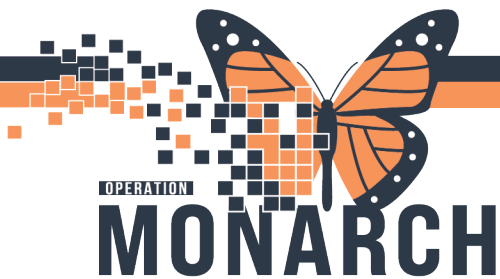


5. Select the Request tab then click on modify request icon.



6. Update the request to processing, then click Save Request.





REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

AccessHIM - Request Management

File View Help

Search by Name

*Request Invoice Notes (1) *Holds XR Template XR Distribute

Patient Name

Patient Name: ZZTEST, GEM MRN: 11000302
Date of Birth: Sunday, January 1, 1950 Sex: Male
Privacy Status:

Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility	Attending Physician
ZZTEST, GEM						

Paper Documents for ZZTEST, GEM

Delivery Information
Delivery Method
Walk-in/Pick-up Billable Pre-Bill

Address Information

Print	Bill To	Mail To	Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City	State	Country
<input checked="" type="checkbox"/>			Thir...	5357	test test	test test		Niagara F...	Onta...	Canada

Accounting of Disclosure
 ADD Required

Purpose: test Description: testing

Request Information

Audit/Medical Review: Authorization Required: Request Status: Processing

Rejection Reason: Chart Unavailable to Provide Duplicate Request Harmful To Individuals/Others Letter of Disagreement

Request Date: 09/Aug/2024 Request Time: 1:34 PM
Required Date: 08/Sep/2024 Required Time: 1:34 PM
Days Overdue: 0

Link to Patient Information Request

Last Updated By

Note: review Holds daily.

- When the Hold is ready to be processed, select the Holds tab, Highlight the hold and select an End date.

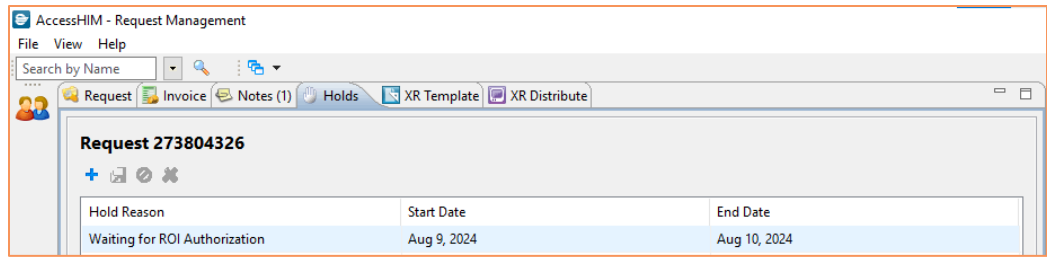
Request 273804326

Hold Reason: Waiting for ROI Authorization Start Date: 8/9/24 End Date: 8/10/24

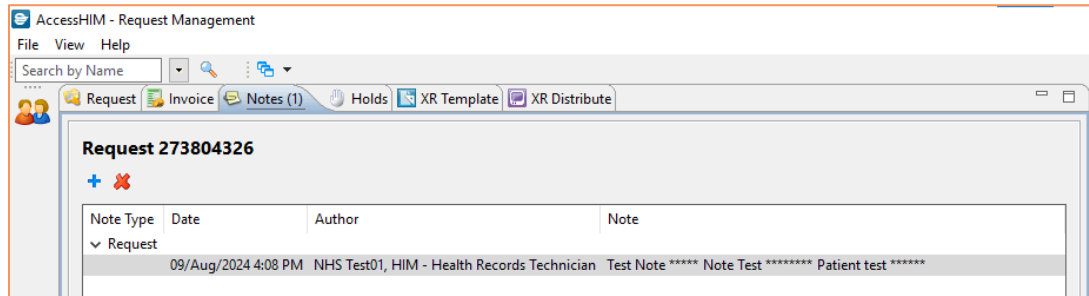


REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

8. Click Save Holds.



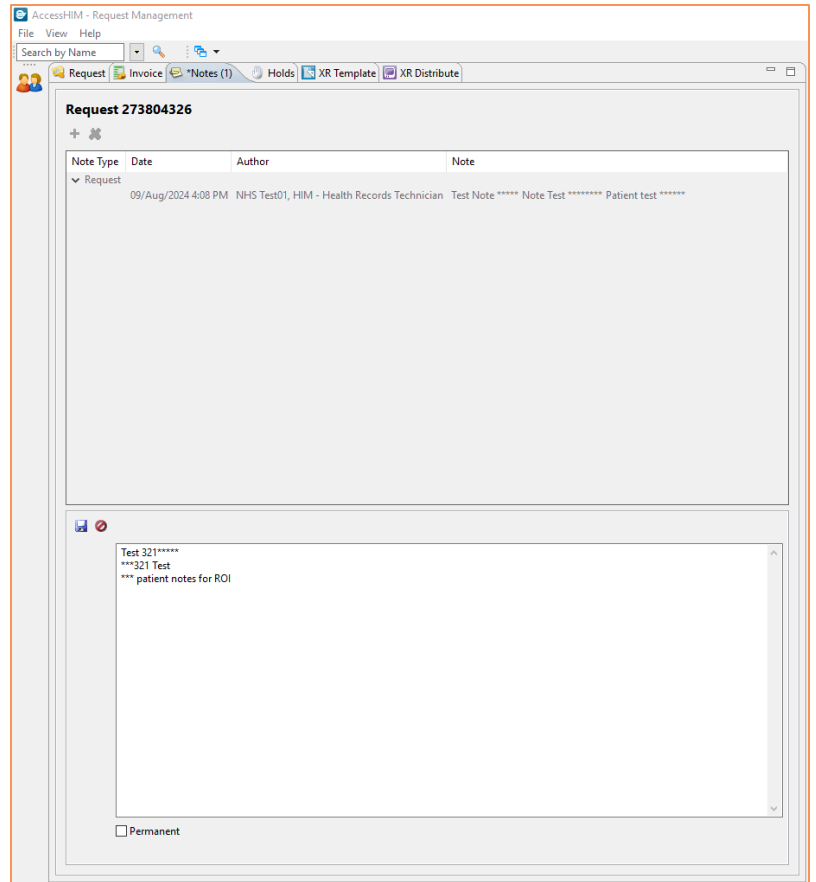
9. Select the Notes tab.





REQUEST MANAGEMENT ROI PROCESS REQUESTS (4A-E) TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

10. Click Add notes and enter comments, then click save Note



11. Note is saved.

