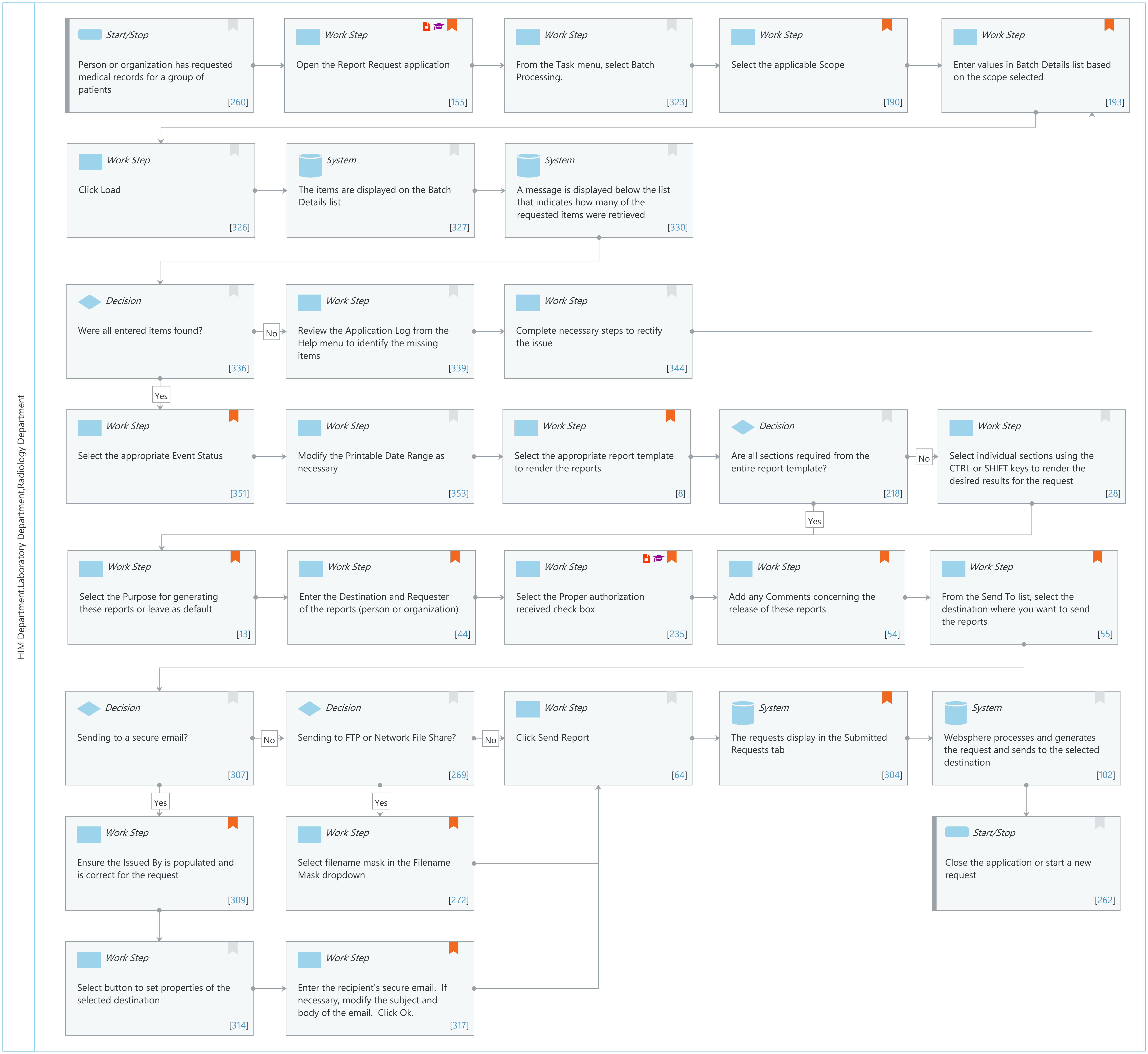
Future State: Clinical Reporting - Report Request - Batch Request

Cerner Workflow ID: 40719 (v. 1.0) Client Workflow ID: 971

Last updated by Idris Ajiboye, Apr 11, 2024 11:53am (UTC -4 hours)



Workflow Details:

Workflow Name: Clinical Reporting - Report Request - Batch Request
Workflow State: Future State
Workstream: Other
Venue: Acute Care
Ambulatory
Long Term Care
Post Acute
Client Owner:
Cerner Owner:
Standard: Yes
Related Workflow(s):
Tags:

Workflow Summary:

Service Line:
Related Solution(s): Clinical Reporting XR
Project Name: Niagara Health System:OPT-0297674:NIAG_CD Niagara HIS RFP
TestBuilder Script(s):
Cerner Workflow ID: 40719 (v. 1.0)
Client Workflow ID: 971
Workflow Notes: For the steps to follow and configure the workflow, see Understand Batch Request Workflow .

This workflow can assist the end user in releasing a batch of medical records in one process as opposed
to doing individual requests.
Introduced By: WS 4
Validated By: WS 6

Swim Lane:

Role(s): HIM Department
Laboratory Department
Radiology Department
Department(s): Health Information Management
Laboratory
Patient Accounting
Radiology
Security Position(s):

Start/Stop [260]

Description: Person or organization has requested medical records for a group of patients

Work Step [155]

Description: Open the Report Request application

Step Impact: Policy/Procedure
Training

Work Step [323]

Description: From the Task menu, select Batch Processing.

Work Step [190]

Description: Select the applicable Scope

Comments: Available options include Encounter, Accession, or Document. Only one scope can be selected.

Work Step [193]

Description: Enter values in Batch Details list based on the scope selected

Comments: Each value must be on its own line. The following values are required for the selected scope:
- Encounter Scope: Enter a list of encounter IDs (not FIN or MRN)

- Accession Scope: Enter a list of unformatted accession numbers
- Document Scope: Enter a list of event IDs

Work Step [326]

Description: Click Load

System [327]

Description: The items are displayed on the Batch Details list

System [330]

Description: A message is displayed below the list that indicates how many of the requested items were retrieved

Decision [336]

Description: Were all entered items found?

Work Step [339]
Description: Review the Application Log from the Help menu to identify the missing items

Work Step [344]
Description: Complete necessary steps to rectify the issue

Work Step [351]
Description: Select the appropriate Event Status
Comments: Verified Only - Includes all published results considered authenticated, verified, or modified.

Verified and Pending - Includes all published results considered verified, modified, in-progress, unauthenticated, transcribed, or transcribed-corrected.

All Results - Includes all published results in any defined status including In Error.

Note: If a document scope is selected, the Event Status box becomes unavailable and is set to All Results. No other event status may be selected for a report with a document scope. This allows all documents for an encounter or person to display for selection.

Work Step [353]
Description: Modify the Printable Date Range as necessary

Work Step [8]
Description: Select the appropriate report template to render the reports
Comments: The user will see the templates that have been granted to their position through Template Security.

Decision [218]
Description: Are all sections required from the entire report template?

Work Step [28]
Description: Select individual sections using the CTRL or SHIFT keys to render the desired results for the request

Work Step [13]

Description: Select the Purpose for generating these reports or leave as default

Comments: Available list is driven by Code Set 14211 (Request Reason).

Work Step [44]

Description: Enter the Destination and Requester of the reports (person or organization)

Comments: If the "XR Requester and Destination" privilege is granted, this becomes a required field. If the privilege is denied and the field is not required, it is recommended to still populate for the use of the Disclosure Audit Report.

Work Step [235]

Description: Select the Proper authorization received check box

Step Impact: Policy/Procedure
Training

Comments: Not all requests require authorization to release the chart. Refer to your organizations policy to determine when it is necessary.

Work Step [54]

Description: Add any Comments concerning the release of these reports

Comments: The maximum number of characters is 1000. These comments will only be viewable/printable in the Disclosure Audit Report

Work Step [55]

Description: From the Send To list, select the destination where you want to send the reports

Comments: These can include a printer, fax, CD/DVD, FTP location, secure email, file share location, and contributor system.

Decision [307]

Description: Sending to a secure email?

Decision [269]

Description: Sending to FTP or Network File Share?

Work Step [64]

Description: Click Send Report

System [304]

Description: The requests display in the Submitted Requests tab

Comments: Each report in the batch will generate its own chart and display as a separate row with its own Report Request ID.

System [102]

Description: Websphere processes and generates the request and sends to the selected destination

Work Step [309]

Description: Ensure the Issued By is populated and is correct for the request

Comments: This will be the Sender of the chart. It must be configured with a valid secure email.

Work Step [272]

Description: Select filename mask in the Filename Mask dropdown

Comments: Configurable filename masks can help end users identify report request files saved to a network file share or FTP location. The " Allow Filename Mask Report Request" privilege allows the selection of the published filename mask to be available in Report Request.

Start/Stop [262]

Description: Close the application or start a new request

Work Step [314]

Description: Select button to set properties of the selected destination

Work Step [317]

Description: Enter the recipient's secure email. If necessary, modify the subject and body of the email. Click Ok.

Comments: The entered email address does not have to be the address associated to the recipient's account. However, it must be provisioned as a secure email in HISP.

The ability modify the subject and body of the email with free text is granted by the "
Allow Secure Email Modification" privilege. If denied, these elements are populated with what is defined in XR Configuration Manager.