Future State: Clinical Reporting - Report Request - Document/Accession

Cerner Workflow ID: 32009 (v. 6.0) Client Workflow ID: 972

Last updated by Debbie Begin, Apr 05, 2024 11:24am (UTC -4 hours)

HIM Department,Laboratory Department,Radiology Department

Start/Stop — Person or organization has requested a specific document or result (accession) from a patient's visit. [260]

Work Step — Open the Report Request application (reportrequest.exe) [155]

Decision — What Report Scope is needed? [289]

Document

Work Step — Select Document from Report Scope drop down menu [291]

Work Step — Search for and select the patient whose report you want to generate [193]

Work Step — Click "Select Document" to use the Document search window [322]

Work Step — Select the needed document(s) and OK [325]

System — The selected document(s) will display in the document box [321]

Accession

Work Step — Select Accession from Report Scope drop down menu [299]

Decision — Do you know the accession number needed? [305]

Yes

Work Step — Use the Accession search field to input the formatted accession number. Click Search. [310]

System — All procedures included on the selected accession(s) will display in the accession box [317]

No

Work Step — Search for and select the patient whose report you want to generate [303]

Work Step — Click "Select Accession" to use the Accession search window [313]

Work Step — Select the needed accession(s) and OK [315]

Work Step — Select the appropriate Event Status [5]

Work Step — Ensure the "All Dates" box is checked [331]

Work Step — Select the appropriate report template to render your report [8]

Work Step — Select the Purpose for generating this report or leave as default [13]

Work Step — Enter the Destination and Requester of the report (person or organization) [44]

Work Step — Select the Proper authorization received check box [235]

Work Step — Add any Comments concerning the release of this report [54]

Decision — Preview Request? [56]

Yes

Work Step — Click Preview Report [355]

System — The request displays in the Submitted Requests tab [356]

System — Websphere processes and generates the request and displays it as a PDF. [57]

Work Step — Review content and close the PDF [72]

No

Work Step — From the Send To list, select the destination where you want to send the report [55]

Decision — Sending to a secure email? [365]

Yes

Work Step — Ensure the Issued By is populated and correct for the request [368]

Work Step — Select button to set properties of the selected destination [370]

Work Step — Enter the recipient's secure email. If necessary, modify the subject and body of the email. Click Ok. [372]

No

Decision — Sending to FTP or Network File Share? [269]

Yes

Work Step — Select filename mask in the Filename Mask dropdown [272]

No

Work Step — Click Send Report [64]

System — The request displays in the Submitted Requests tab [360]

System — Websphere processes and generates the request and sends to the selected destination [102]

Start/Stop — Close the application or start a new request [262]

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Workflow Details:

Workflow Name:	Clinical Reporting - Report Request - Document/Accession
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:	32009 (v. 6.0)
Client Workflow ID:	972
Workflow Notes:	For the steps to configure and follow the workflow, see Understand Report Request Document & Accession Workflow . Report Request can meet the varying needs of individual users for releasing patient charts without having to access the patient's electronic record. This workflow can assist the end user in releasing a full medical record, an abbreviated record consisting of only pertinent information, and/or multiple charts at once. Further, it can be used to release charts with different scopes, such as Encounter, Document, and Accession. It also provides the ability to limit the information on the chart by a date range in the event of long visits.
Introduced By:	WS 4
Validated By:	WS 6

Swim Lane:

Role(s):	HIM Department Laboratory Department Radiology Department
Department(s):	Health Information Management

Laboratory
Radiology

Security Position(s):

Start/Stop [260]

Description: Person or organization has requested a specific document or result (accession) from a patient's visit.

Work Step [155]

Description: Open the Report Request application (reportrequest.exe)

Step Impact: Policy/Procedure
Training

Decision [289]

Description: What Report Scope is needed?

Work Step [291]

Description: Select Document from Report Scope drop down menu

Work Step [193]

Description: Search for and select the patient whose report you want to generate

Comments: You may search for the patient by:
- Name
- Medical Record Number (MRN)
- Financial Number (FIN)

Work Step [322]

Description: Click "Select Document" to use the Document search window

Comments: All available documents for the patient will be displayed in the Document Search window. If the patient was selected using the FIN, or a visit was selected from the Visits panel, only documents from that visit will display.

Work Step [325]

Description: Select the needed document(s) and OK

Comments: Multiple documents may be selected at once using the CTRL key.

System [321]

Description: The selected document(s) will display in the document box

Work Step [299]

Description: Select Accession from Report Scope drop down menu

Decision [305]

Description: Do you know the accession number needed?

Work Step [310]

Description: Use the Accession search field to input the formatted accession number. Click Search.

System [317]

Description: All procedures included on the selected accession(s) will display in the accession box

Work Step [303]

Description: Search for and select the patient whose report you want to generate

Comments: You may search for the patient by:
Name
Medical Record Number (MRN)
Financial Number (FIN)
Formatted Accession Number

Work Step [313]

Description: Click "Select Accession" to use the Accession search window

Comments: All available accessions for the patient are displayed in the Accession Search window. If the patient was selected using the FIN, or a visit was selected from the Visits panel, only accessions from that visit will display.

Work Step [315]

Description: Select the needed accession(s) and OK

Comments: Multiple Accessions may be selected at once using the CTRL key. If an accession includes multiple procedures, only one row needs to be selected.

Work Step [5]

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 [331]

Description: Ensure the "All Dates" box is checked

Work Step [8]

Description: Select the appropriate report template to render your report

Comments: For Accession Scope: use a template that contains sections for the applicable procedure type:
- General Lab, Blood Bank, and Microbiology procedures: Laboratory Template.
- Anatomic Pathology Reports: Anatomic Pathology Template or Anatomic Pathology Billing Template
- Radiology Reports:
Radiology Template or Radiology Billing Template

For Document Scope, use a template that contains only document sections: Document Template, Document Template with Tracked Changes, Discharge Instructions Template

Work Step [13]

Description: Select the Purpose for generating this report 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 report (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 this report

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

Decision [56]

Description: Preview Request?

Comments: The ability to Preview the chart is granted by the "Preview Clinical Reports" privilege. If the user's position does not have the privilege granted, they will not have the Preview button available.

Work Step [355]

Description: Click Preview Report

System [356]

Description: The request displays in the Submitted Requests tab

Comments: If multiple documents or accessions were selected, each will generate it's own chart and display as a separate row with it's own Report Request ID.

System [57]

Description: Websphere processes and generates the request and displays it as a PDF.

Comments: If multiple documents or accession were selected, the PDF renderings will not automatically display. To display the charts, select the applicable row from the Submitted Requests tab, right-click and select Preview.

Work Step [72]

Description: Review content and close the PDF

Comments: Do not print or save the chart through the PDF Reader. Doing so eliminates the audit trail of the release which is used for capturing the release details in the disclosure audit report.

Work Step [55]

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

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

Decision [365]

Description: Sending to a secure email?

Decision [269]

Description: Sending to FTP or Network File Share?

Work Step [64]

Description: Click Send Report

System [360]

Description: The request displays in the Submitted Requests tab

Comments: If multiple documents or accessions were selected, each will generate it's own chart and display as a separate row with it's own Report Request ID.

System [102]

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

Work Step [368]

Description: Ensure the Issued By is populated and 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 [370]

Description: Select button to set properties of the selected destination

Work Step [372]

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.