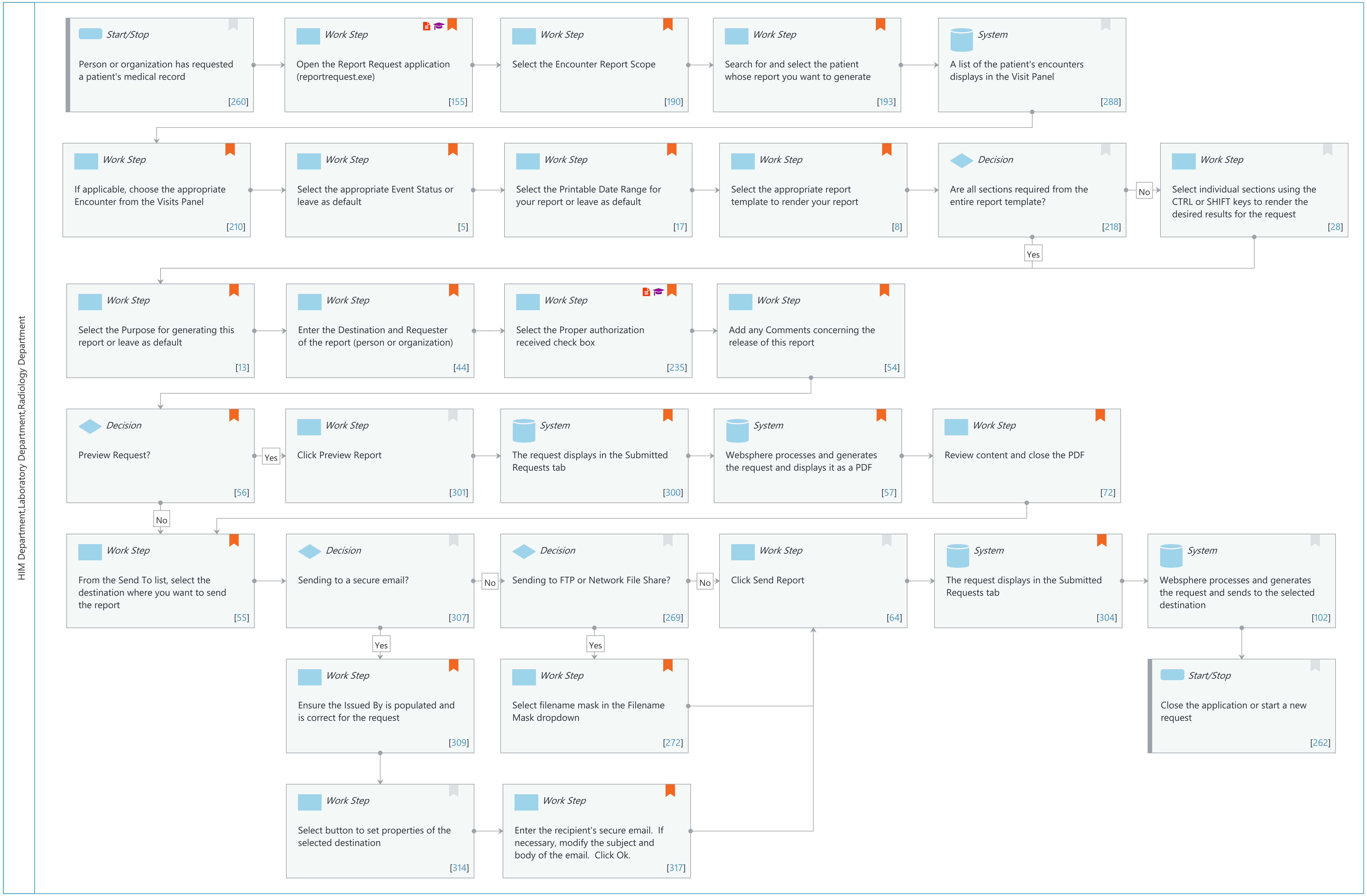
Niagara Health System

Oct 16, 2024

Future State: Clinical Reporting - Report Request - Encounter

Cerner Workflow ID: 9230 (v. 17.0) Client Workflow ID: 973

Last updated by Debbie Begin, Apr 05, 2024 11:28am (UTC -4 hours)



Workflow Details:

Workflow Name: Clinical Reporting - Report Request - Encounter
Workflow State: Future State
Workstream: Discharge/Check Out
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: 9230 (v. 17.0)
Client Workflow ID: 973
Workflow Notes: For the steps to configure and follow the workflow, see Understand Report Request Encounter 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 help you release a full medical record, an abbreviated record consisting of only pertinent information, as well as multiple charts for a single patient. This workflow 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

Patient Accounting
Radiology

Security Position(s):

Start/Stop [260]

Description: Person or organization has requested a patient's medical record

Work Step [155]

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

Step Impact: Policy/Procedure
Training

Work Step [190]

Description: Select the Encounter Report Scope

Comments: Person - Produces charts that contain result information for all encounters associated with the specified patient. This scope facilitates monitoring the condition of patients who are admitted to your institution more than once.

Cross-Encounter - Produces a chart that includes selected encounter information from the user. This scope is used by audiences who require specific patient encounters using the medical record number or financial number.

Encounter - Produces charts that include all the result information that has been verified throughout a patient's encounter. This scope is used by audiences who require comprehensive records of a patient's stay.

Accession - Produces a chart that contains the results for a single accession number.

Document - Produces a chart that contains the selected document or documents.

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 [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)

System [288]

Description: A list of the patient's encounters displays in the Visit Panel

Work Step [210]

Description: If applicable, choose the appropriate Encounter from the Visits Panel

Comments: If FIN was used to search, the visit will already be selected.

Multiple visits can be selected by using the CTRL key.

Work Step [5]

Description: Select the appropriate Event Status or leave as default

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 [17]

Description: Select the Printable Date Range for your report or leave as default

Comments: Clinical Range - Results will qualify that were clinically significant for the selected date range.

Posting Range - results will qualify that were
posted to the data base for the selected date range.

Work Step [8]

Description: Select the appropriate report template to render your report

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 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 [301]

Description: Click Preview Report

System [300]

Description: The request displays in the Submitted Requests tab

Comments: If multiple encounters 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 encounters 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 [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 request displays in the Submitted Requests tab
Comments: If multiple encounters 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 [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.