Niagara Health System

Oct 16, 2024

Future State: HIM - Deficiency Management: Analysis

Cerner Workflow ID: 219 (v. 20.0)   Client Workflow ID: 492   Last updated by **Debbie Begin, Mar 11, 2024 3:43pm (UTC –4 hours)**

System Automation

Off Page Reference
Transitions - Inpatient Discharge
[25088]

→

System
Deficiency Analysis
Analysis task is created
[25082]

HIM Specialist

Start/Stop
Log in to AppBar.exe
[15994]

→ **Work Step** *Deficiency Analysis* — Click Patient Deficiency Analysis [24753]

→ **Work Step** *Deficiency Analysis* — Click Analysis Queue [24755]

→ **Work Step** *Deficiency Analysis* — Select appropriate Task Type and click OK [24787]

→ **System** *Deficiency Analysis* — Tasks appear based on the user's preferences, sort order, and filters [24889]

Work Step *Deficiency Analysis* — Double-click on the first pending task to open the encounter in Patient Deficiency Analysis [15995]

→ **System** *Deficiency Analysis* — Electronic, transcribed, and scanned deficiency documents display in the Document Pane (if applicable) [24811]

→ **System** *Deficiency Analysis* — System generated anticipated document(s) display in the Document Pane (if applicable) [25039]

→ **System** *Deficiency Analysis* — Pending order cosignatures display in the Order Pane (if applicable) [24806]

→ **System** *Deficiency Analysis* — Visit allocation date displays in the blue banner bar and based on deficiency created date [24809]

Work Step *PowerChart* — Select PowerChart to open the patient's chart [24816]

→ **Work Step** *PowerChart* — Move PowerChart to the second monitor [25042]

→ **Work Step** *PowerChart* — Review documentation and orders (if applicable) [24882]

Work Step *Deficiency Analysis* — Click on Add... [16003]

→ **Work Step** *Deficiency Analysis* — Select the deficient personnel from the Personnel Quick Pick or by searching using the Provider Selection tool [24791]

→ **Work Step** *Deficiency Analysis* — Select the document type [24897]

→ **System** *Deficiency Analysis* — Deficiency status automatically displays as "Document" [24900]

Decision
Based on organization's analysis policies and procedures, are any documents missing?
[24722]

— **Yes** →

Work Step *Deficiency Analysis* — Repeat steps for additional anticipated documents (if applicable) [24800]

→ **Work Step** *Deficiency Analysis* — Click OK and click Close [24903]

→ **System** *PowerChart* — Anticipated document(s) populates provider's Message Center [24857]

→ **Off Page Reference** *PowerChart* — HIM - Deficiency Management: Letters (Deficiency Review) [24782]

No →

Decision *Deficiency Analysis* — Are there any scanned deficiency documents present? [24710]

— **Yes** → **Off Page Reference** — HIM - Deficiency Management: Analysis (Scanned Documents) [25062]

— **No** →

Decision *PowerChart* — Are there any documents that need a correction (wrong document type, encounter, scanning error, etc)? [24741]

— **Yes** → **Off Page Reference** — Chart Completion: Documentation Correction [24742]

— **No** →

Work Step *Deficiency Analysis* — Are there any deficiencies that need to be reassigned to a different provider? [24842]

— **Yes** →

Work Step *Deficiency Analysis* — Click on the providers's name in the Document Pane for the applicable deficiency [24846]

→ **Work Step** *Deficiency Analysis* — Click Remove under the Personnel box [24849]

→ **Work Step** *Deficiency Analysis* — Select the correct provider from the Personnel Quick Pick or Provider Selection tool [24851]

→ **Work Step** *Deficiency Analysis* — Click Add under the Personnel box [24853]

Work Step *Deficiency Analysis* — Update the Status and the allocation date in the Document Pane (if necessary) and click Submit [24855]

→ **System** *PowerChart* — Document is removed from the original provider's Message Center [24919]

→ **System** *PowerChart* — Document populates new provider's Message Center [24921]

→ **Off Page Reference** — HIM - Deficiency Management: Letters (Deficiency Review) [25067]

— **No** →

Decision *Deficiency Analysis* — Are there any documents missing an element (blanks in transcription, missing data on scanned doc, etc)? [25073]

— **Yes** → **Off Page Reference** — HIM - Deficiency Management: Analysis (Missing Elements) [25075]

— **No** →

Decision *Deficiency Analysis* — Are there questions for an analysis manager, or corrections needed to encounter type or demographics? [24749]

— **Yes** → **Off Page Reference** *Deficiency Analysis* — HIM - Deficiency Management: Analysis (Pass on Task) [24878]

— **No** →

Work Step *Deficiency Analysis* — Click Complete Analysis Task [24871]

→ **Work Step** *Deficiency Analysis* — Click OK [24875]

→ **Work Step** *PowerChart* — Close PowerChart [25046]

→ **Start/Stop** *Deficiency Analysis* — Click Next Task (blue arrow) to repeat process for the next task [16005]

Future State: HIM - Deficiency Management: Analysis

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Workflow Details:

Workflow Name: HIM - Deficiency Management: Analysis
Workflow State: Future State
Workstream: Post-Discharge/Post-Visit
Venue: Acute Care
Emergency Medicine
Perioperative
Client Owner:
Cerner Owner:
Standard: Yes
Related Workflow(s):
Tags:

Workflow Summary:

Service Line:
Related Solution(s): Health Information Management
Project Name: Niagara Health System:OPT-0297674:NIAG_CD Niagara HIS RFP
TestBuilder Script(s):
Cerner Workflow ID: 219 (v. 20.0)
Client Workflow ID: 492
Workflow Notes: For the steps to configure and follow the workflow, see Understand Deficiency Management Analysis Workflow .

HIM specialists use analysis task queues in Patient Deficiency Analysis to identify encounters to be reviewed for missing documents. For any encounters with missing documents, deficiencies are assigned to the appropriate physician based on a list of predefined deficiency documents. These deficiencies are displayed as anticipated documents in the physician's Message Center. When a deficiency is resolved, the deficiency status is updated automatically in Patient Deficiency Analysis. Deficiency analysis allows for timely and accurate coding and billing, and ensures the medical record is complete in accordance to regulatory requirements.

Introduced By: WS 1
Validated By: WS 2

Swim Lane:

Role(s): System Automation
Department(s): Health Information Management
Security Position(s): DBA

Future State: HIM - Deficiency Management: Analysis

Off Page Reference [25088]

   Workflow Link: Transitions - Inpatient Discharge

System [25082]

   Description: Analysis task is created

   Method: Deficiency Analysis

   Comments: Tasks are created in task queues based on qualifiers such as encounter type and facility.

   Swim Lane:

   Role(s): HIM Specialist

   Department(s): Health Information Management

   Security Position(s): HIM - Specialist

Start/Stop [15994]

   Description: Log in to AppBar.exe

   Value Impact: Quality

Work Step [24753]

   Description: Click Patient Deficiency Analysis

   Method: Deficiency Analysis

Work Step [24755]

   Description: Click Analysis Queue

   Method: Deficiency Analysis

Work Step [24787]

   Description: Select appropriate Task Type and click OK

   Method: Deficiency Analysis

   Comments: If you analyze multiple encounter types, you will need to check your task type prior to analyzing.

System [24889]

   Description: Tasks appear based on the user's preferences, sort order, and filters

   Method: Deficiency Analysis

   Comments: Recommendation is to sort discharge date descending.

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Work Step [15995]

Description: Double-click on the first pending task to open the encounter in Patient Deficiency Analysis

Method: Deficiency Analysis

System [24811]

Description: Electronic, transcribed, and scanned deficiency documents display in the Document Pane (if applicable)

Method: Deficiency Analysis

Step Impact: Training

Comments: Validate all filters under "Show" are selected.

System [25039]

Description: System generated anticipated document(s) display in the Document Pane (if applicable)

Method: Deficiency Analysis

Comments: Automated anticipated documents may include: History and Physical created on admission, Discharge Summary created on discharge, Operative Report created for Outpatient Surgery patients.

System [24806]

Description: Pending order cosignatures display in the Order Pane (if applicable)

Method: Deficiency Analysis

Comments: If orders tracking is turned on in HIM System Parameters, unsigned phone and verbal orders appear in the Order Pane.

System [24809]

Description: Visit allocation date displays in the blue banner bar and based on deficiency created date

Method: Deficiency Analysis

Comments: Model recommendation is to begin visit aging based on the discharge date.

Work Step [24816]

Description: Select PowerChart to open the patient's chart

Method: PowerChart

Future State: HIM - Deficiency Management: Analysis

Work Step [25042]

    Description: Move PowerChart to the second monitor

    Method: PowerChart

Work Step [24882]

    Description: Review documentation and orders (if applicable)

    Method: PowerChart

    Comments: Review nursing peri-operative notes or anesthesia record to determine if an Operative Report is missing. Validate the physician assigned to any missing History and Physical and Discharge Summary against the Admit Order and Discharge Order. If applicable, review Consult Orders to add an anticipated document for a Consultation Note.

Work Step [16003]

    Description: Click on Add...

    Method: Deficiency Analysis

Work Step [24791]

    Description: Select the deficient personnel from the Personnel Quick Pick or by searching using the Provider Selection tool

    Method: Deficiency Analysis

Work Step [24897]

    Description: Select the document type

    Method: Deficiency Analysis

System [24900]

    Description: Deficiency status automatically displays as "Document"

    Method: Deficiency Analysis

    Comments: The default deficiency status should be set to "Document" in View > Options > Settings.

Decision [24722]

    Description: Based on organization's analysis policies and procedures, are any documents missing?

    Step Impact: Policy/Procedure

    Comments: Majority of clients review the encounter for missing History and

Future State: HIM - Deficiency Management: Analysis

Physical, Discharge Summary, and Operative Reports. Some clients review for missing Consultation Notes.

Work Step [24800]

Description: Repeat steps for additional anticipated documents (if applicable)

Method: Deficiency Analysis

Work Step [24903]

Description: Click OK and click Close

Method: Deficiency Analysis

System [24857]

Description: Anticipated document(s) populates provider's Message Center

Method: PowerChart

Off Page Reference [24782]

Workflow Link: HIM - Deficiency Management: Letters (Deficiency Review)

Method: PowerChart

Off Page Reference [25062]

Workflow Link: HIM - Deficiency Management: Analysis (Scanned Documents)

Decision [24710]

Description: Are there any scanned deficiency documents present?

Method: Deficiency Analysis

Decision [24741]

Description: Are there any documents that need a correction (wrong document type, encounter, scanning error, etc)?

Method: PowerChart

Off Page Reference [24742]

Workflow Link: Chart Completion: Documentation Correction

Work Step [24846]

Description: Click on the providers's name in the Document Pane for the applicable deficiency

Method: Deficiency Analysis

Work Step [24849]

    Description: Click Remove under the Personnel box

    Method: Deficiency Analysis

Work Step [24851]

    Description: Select the correct provider from the Personnel Quick Pick or Provider Selection tool

    Method: Deficiency Analysis

Work Step [24853]

    Description: Click Add under the Personnel box

    Method: Deficiency Analysis

    Comments: The provider's name populates under the applicable deficiency in the Document Pane

Work Step [24842]

    Description: Are there any deficiencies that need to be reassigned to a different provider?

    Method: Deficiency Analysis

Work Step [24855]

    Description: Update the Status and the allocation date in the Document Pane (if necessary) and click Submit

    Method: Deficiency Analysis

System [24919]

    Description: Document is removed from the original provider's Message Center

    Method: PowerChart

System [24921]

    Description: Document populates new provider's Message Center

    Method: PowerChart

Off Page Reference [25067]

    Workflow Link: HIM - Deficiency Management: Letters (Deficiency Review)

Decision [25073]

    Description: Are there any documents missing an element (blanks in transcription, missing data on scanned doc, etc)?

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          Method: Deficiency Analysis

Off Page Reference [25075]
   Workflow Link: HIM - Deficiency Management: Analysis (Missing Elements)

Off Page Reference [24878]
   Workflow Link: HIM - Deficiency Management: Analysis (Pass on Task)
          Method: Deficiency Analysis

Decision [24749]
   Description: Are there questions for an analysis manager, or corrections needed to encounter type or demographics?
          Method: Deficiency Analysis

Work Step [24871]
   Description: Click Complete Analysis Task
          Method: Deficiency Analysis

Work Step [24875]
   Description: Click OK
          Method: Deficiency Analysis

Work Step [25046]
   Description: Close PowerChart
          Method: PowerChart

Start/Stop [16005]
   Description: Click Next Task (blue arrow) to repeat process for the next task
          Method: Deficiency Analysis