HIM Clerk

- **Off Page Reference** — HIM - Deficiency Management: Letters (Deficiency Review) [18384]
- **Start/Stop** — Log into AppBar.exe and open Letters Preference Tool [18355]
- **Work Step** — Select the New Changes tab [18354]
- **Work Step** — Click Load [18357]

- **Decision** — Do you receive an alert that "No personnel with new changes are found"? [18363]
  - No → **System** — Providers with new email addresses or fax numbers will appear [18359]
  - **Work Step** — For each provider, select either Email, Fax, or Paper [18367]
  - **Work Step** — Click Save All [18369]
  - Yes ↓

- **Work Step** — From the AppBar, open Letters [18194]
- **Work Step** — Select Letter type [18196]
- **Work Step** — Update check boxes/radio button letter options as needed [18209]
- **Work Step** — Select Facility or default "All Facilities" [18198]
- **Work Step** — Click Retrieve Physicians [18345]

- **System** — Providers that qualify for letters based on the "Letter Details" filters appear [18347]
- **Work Step** — Highlight provider(s) that should not receive a letter [18207]
- **Work Step** — Click Move to send the providers to the "Do not print letters for:" section [18213]
- **Work Step** — Review distribution methods (Email, Fax, Paper) and adjust if needed [18350]

- **System** — For providers with Paper preference, the letter will print to the HIM Specialist's default printer [18227]
- **Work Step** — Send provider letter via mail, certified mail, interoffice, etc. [18233]

- **Work Step** — Select Distribute Letters [18218]
- **System** — For providers with Fax preference, a fax will be sent to their fax address built in Destination Routing [18221]
- **Decision** — Did the fax process through RRD? [18231]
  - Yes → **System** — Letters distribute [18393]
  - No
- **Work Step** — Click Print List to keep a paper list of providers and the letters that were sent [18425]

- **System** — For providers with Email preference, an email will be sent to their email address built in HNA User [18224]
- **Decision** — Was the email address valid? [18225]
  - Yes →
  - No ↓
- **Work Step** — Bounce-back emails or replies will send to the email listed in the "Return email address field" in HIM Letter Template [18235]

- **Decision** — Do policy and procedures include keeping a copy of the letter? [18275]
  - No → **Start/Stop** — Repeat steps for each letter type [18403]
  - Yes → **Work Step** — Change preferences for all providers to paper (if not already set to paper) [18276]
    - **Work Step** — Select Distribute Letters [18278]
    - **Start/Stop** — File letters and purge letters per policy [18291]

HIM Department

- **Work Step** — Update email address in HNA User [18270]
- **Work Step** — Periodically review fax failures in RRD Report Queue where the status is "Error" [18248]
- **Start/Stop** — Notify HIM Manager to resubmit letter [18266]

Future State: HIM - Deficiency Management: Letters (Send to Providers)

Cerner Workflow ID: **9991 (v. 14.0)**   Client Workflow ID: **501**   Last updated by Debbie Begin, Feb 13, 2024 5:21pm (UTC -4 hours)

Workflow Details:

Workflow Name: HIM - Deficiency Management: Letters (Send to Providers)
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: 9991 (v. 14.0)
Client Workflow ID: 501
Workflow Notes: For the steps to configure and follow the workflow, see Understand Letters Send to Providers Workflow .

With this workflow, deficiency letters are generated and sent to physicians. Deficiency letters
can be printed, faxed, or emailed and a default distribution method
can be set for each individual physician. Physicians automatically
qualify for a letter depending on the parameters that are
configured for the deficiency letters. Before distributing letters,
you can determine which physicians will not receive a letter (for
example, a physician on vacation).

Deficiency letters should be sent to physicians to assist
with timely documentation and to avoid suspension, according to
policies and procedures. While physicians are notified of their
deficiencies in Message Center, sending letters via paper, fax, or
email provides a secondary means of notification. It is important
to review failure steps and re-send letters when applicable.

Introduced By: WS 1
Validated By: WS 2

Cerner Workflow ID: 9991 (v. 14.0)   Client Workflow ID: 501   Last updated by Debbie Begin, Feb 13, 2024 5:21pm (UTC -4 hours)

Swim Lane:

Role(s): HIM Clerk [Custom]
Department(s): Health Information Management
Security Position(s): HIM - Specialist

Off Page Reference [18384]

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

Value Impact: Quality

Start/Stop [18355]

Description: Log into AppBar.exe and open Letters Preference Tool

Work Step [18354]

Description: Select the New Changes tab

Work Step [18357]

Description: Click Load

Decision [18363]

Description: Do you receive an alert that "No personnel with new changes are found"?

System [18359]

Description: Providers with new email addresses or fax numbers will appear

Work Step [18367]

Description: For each provider, select either Email, Fax, or Paper

Comments: Paper: Will print to the default printer that is selected in the
Print Setup of Letters.
Fax: Will be faxed to the the provider's fax number built in the Destination
Routing Wizard.
Email: Will send to the provider's email address in HNAUser.exe.

If the fax or email radio button are dithered (disabled), the provider's fax or email is
not configured in the above tools.

Work Step [18369]

Description: Click Save All

Future State: HIM - Deficiency Management: Letters (Send to Providers)

Work Step [18194]

Description: From the AppBar, open Letters

Work Step [18196]

Description: Select Letter type

Comments: Model letters include:
Incomplete Letter
Reminder Letter
Suspension Letter

Work Step [18209]

Description: Update check boxes/radio button letter options as needed

Comments: If using visit level letters and the email feature, un-check "Print deficiencies" to send a letter without PHI.

Work Step [18198]

Description: Select Facility or default "All Facilities"

Work Step [18345]

Description: Click Retrieve Physicians

System [18347]

Description: Providers that qualify for letters based on the "Letter Details" filters appear

Comments: Letter details are configured in HIMLetterTemplate.exe

Work Step [18207]

Description: Highlight provider(s) that should not receive a letter

Work Step [18213]

Description: Click Move to send the providers to the "Do not print letters for:" section

Work Step [18350]

Description: Review distribution methods (Email, Fax, Paper) and adjust if needed

Comments: Letter preferences should be maintained using HIMLettersPreference. exe but can be adjusted if needed.

Future State: HIM - Deficiency Management: Letters (Send to Providers)

System [18227]
Description: For providers with Paper preference, the letter will print to the HIM Specialist's default printer

Work Step [18233]
Description: Send provider letter via mail, certified mail, interoffice, etc.

Work Step [18218]
Description: Select Distribute Letters

System [18221]
Description: For providers with Fax preference, a fax will be sent to their fax address built in Destination Routing

Comments: Device Cross Reference was replaced by Core - Clinical Reporting: Clinical Reporting Destination Routing Bedrock wizard on 2018.06 code.

Decision [18231]
Description: Did the fax process through RRD?

Comments: Failures can include that the fax line was busy or that the receiving fax machine was off.

System [18393]
Description: Letters distribute

Work Step [18425]
Description: Click Print List to keep a paper list of providers and the letters that were sent

System [18224]
Description: For providers with Email preference, an email will be sent to their email address built in HNA User

Comments: Current functionality does not allow the letter to be sent via Cerner Direct/Secure Messaging or to Message Center. Test all email addresses prior to use.

Decision [18225]
Description: Was the email address valid?

Decision [18275]

Description: Do policy and procedures include keeping a copy of the letter?

Step Impact: Policy/Procedure

Comments: Step more common for suspension workflows.

Work Step [18235]

Description: Bounce-back emails or replies will send to the email listed in the "Return email address field" in HIM Letter Template

Start/Stop [18403]

Description: Repeat steps for each letter type

Work Step [18276]

Description: Change preferences for all providers to paper (if not already set to paper)

Work Step [18278]

Description: Select Distribute Letters

Start/Stop [18291]

Description: File letters and purge letters per policy

Swim Lane:

Role(s): HIM Department

Department(s): Health Information Management

Security Position(s): HIM - IT

Work Step [18270]

Description: Update email address in HNA User

Work Step [18248]

Description: Periodically review fax failures in RRD Report Queue where the status is "Error"

Comments: RRD Report Queue includes all fax transmissions for the organization. Refer to the Report Title column to differentiate between the source and destinations of each fax transmission.

Start/Stop [18266]

Description: Notify HIM Manager to resubmit letter