



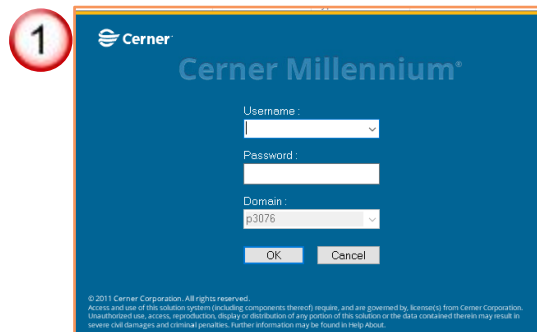
REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HIM ROI ROLES

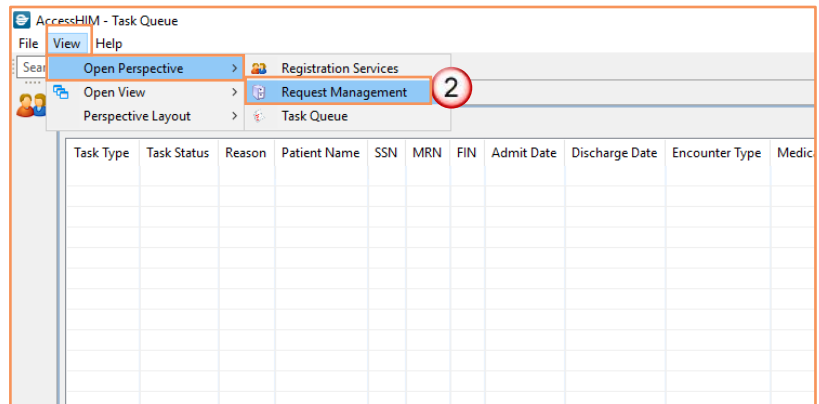
HOSPITAL INFORMATION SYSTEM (HIS)

HIM - Release of Information: Request Management (Log a Request): This workflow is used if a request needs to be processed or rejected, which the rejection can be specified and printed.

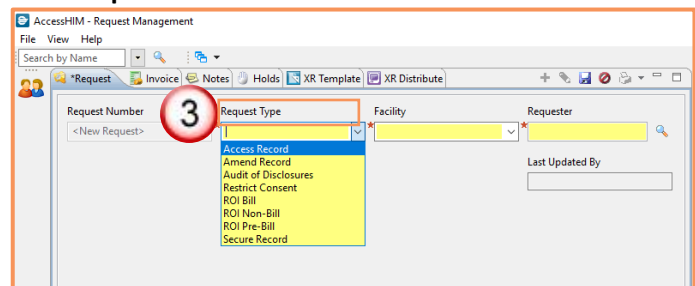
1. Log into **AccessHIM** application.



2. Select the **Request** tab and click **Add Request**.



3. Select the request type (ROI Bill, ROI Non-Bill, ROI Pre-Bill) **Niagara Health and HDS will only use "Pre-bill" request type unless processing a WSIB request.**



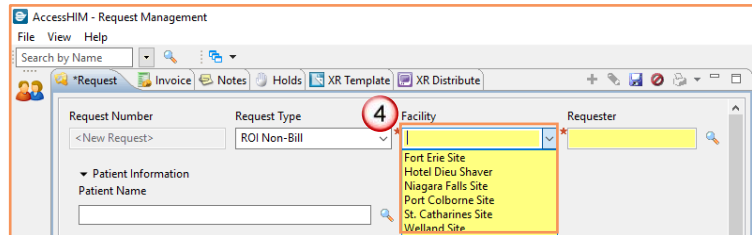


REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

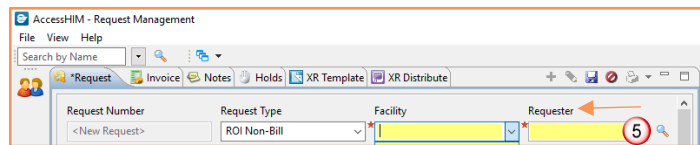
HOSPITAL INFORMATION SYSTEM (HIS)

4. Select a **Facility**.

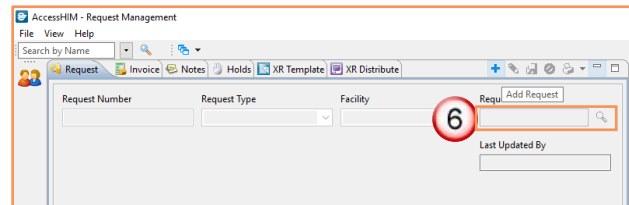
Note: only one facility can be selected at a time.



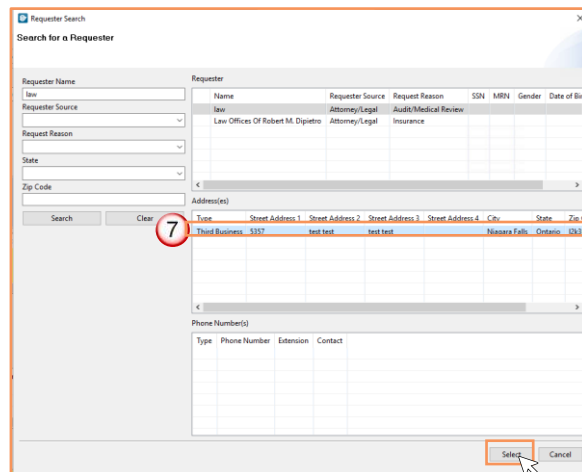
5. Click on the **Requester Search**.



6. Type the **Requester's** name using minimum of 3 characters. Click **Search** (or click enter).



7. **Highlight the Requester** that you want to release the information to, and click **Select**.



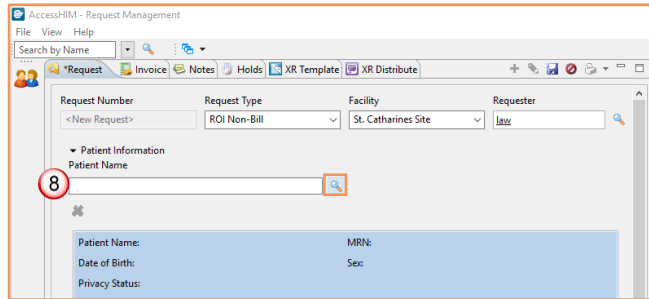


REQUEST MANAGEMENT ROI LOG

A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

8. Click on **Patient Search**.

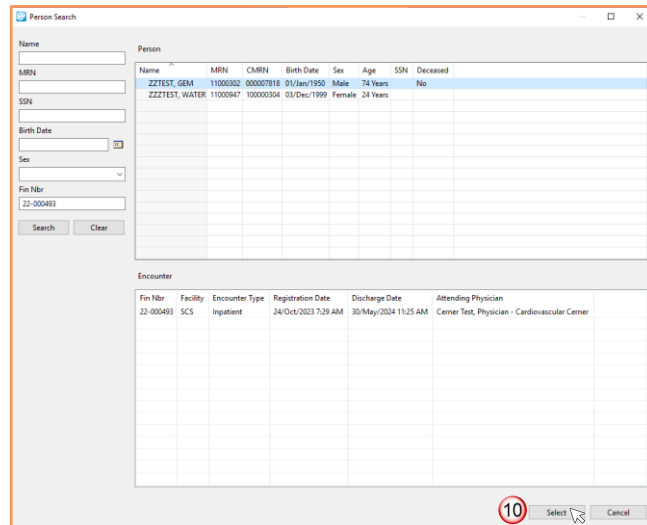


9. Enter the patient's **DOB, MRN, FIN, HCN** (if applicable) and **Name** and click **Search**.



10. Then click **Select**.

Note: Has the patient been found? If not, follow workflow, Request Management ROI-Patient Not Found.





REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

11. **Highlight the encounters.** If no encounters are selected the request will processed on a person level.

11

Patient Name: ZZTEST, GEM		MRN: 11000302				
Date of Birth: Sunday, January 1, 1950		Sex: Male				
Privacy Status:						
Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility	Attending P
> ZZTEST, GEM						

12. If applicable select **Paper document**.

AccessHIM - Request Management

File View Help

Search by Name

*Request Invoice Notes Holds XR Template XR Distribute

Patient Name: ZZTEST, GEM MRN: 11000302

Date of Birth: Sunday, January 1, 1950 Sex: Male

Privacy Status:

Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility	Attending P
> ZZTEST, GEM						

12 Paper Documents for ZZTEST, GEM

Select: [All](#) [None](#)

- Clinic Report
- Consultation Report
- Discharge Summary
- Free Text
- H&P
- Imaging



REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

13. Validate and update the **Delivery Method**.

Patient Name: ZZTEST, GEM MRN: 11000302
Date of Birth: Sunday, January 1, 1950 Sex: Male
Privacy Status:

Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility
> ZZTEST, GEM					

Paper Documents for ZZTEST, GEM
select: [All](#) [None](#)

- Clinic Report
- Consultation Report
- Discharge Summary
- Free Text
- H&P
- Imaging

ABC test

13 Delivery Information
Delivery Method: **Mail** Billable Pre-Bill

Address 2	Street Address 3	Street Address 4
	test test	

Description

14. Validate and update the **Billable or Pre-Bill check box** (if applicable). Validate the correct address is checked for Bill To (if Billable) and Mail To (if Mailing) or both.

AccessHIM - Request Management
File View Help
Search by Name

Request Number: <New Request> Request Type: ROI Non-Bill Facility: St. Catharines Site Requester: lauz

Patient Information
Patient Name:

Patient Name: ZZTEST, GEM MRN: 11000302
Date of Birth: Sunday, January 1, 1950 Sex: Male
Privacy Status:

Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility	Attending PI
> ZZTEST, GEM						

Paper Documents for ZZTEST, GEM
select: [All](#) [None](#)

- Clinic Report
- Consultation Report
- Discharge Summary
- Free Text
- H&P
- Imaging

ABC test

Delivery Information
Delivery Method: Walk-in/Pick-up Billable Pre-Bill **14**

Address Information

Print	Bill To	Mail To	Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Thir...	5357	test test	test test		Niagara F...

Accounting of Disclosure
 ADD Required



REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

15. Ensure **AOD** is checked off and **Enter AOD purpose**.

Note: this is required to be PHIPA compliant with the handling and disclosure of patient information.

Accounting of Disclosure

AOD Required **15**

Purpose: [Empty field]

Description: [Empty field]

Request Information

Request Reason: Audit/Medical Review

Authorization Required:

Request Status: Initial

Rejection Reason: [None selected]

Request Date: 07/Aug/2024

Request Time: 1:40 PM

Required Date: 06/Sep/2024

Required Time: 1:40 PM

Days Overdue: 0

Link to Patient Information Request

Last Updated By: [Empty field]

16. AOD is always required. Enter the appropriate **AOD description** for the request to the **Clinical Reporting XR** solution.

Accounting of Disclosure

AOD Required **16**

Purpose: legal test

Description: log a request test test

Request Information

Request Reason: Audit/Medical Review

Authorization Required:

Request Status: Initial

Rejection Reason: [None selected]

Request Date: 07/Aug/2024

Request Time: 1:40 PM

Required Date: 06/Sep/2024

Required Time: 1:40 PM

Days Overdue: 0

Link to Patient Information Request

Last Updated By: [Empty field]



REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

17. Validate and update Authorization Required check box (if applicable). Select **Authorized**, **Implied Consent**, or **Not Authorized** per organization policies.

AccessHIM - Request Management

File View Help

Search by Name

Request Invoice Notes Holds XR Template XR Distribute

Patient Name: ZZTEST, GEM MRN: 11000302
Date of Birth: Sunday, January 1, 1950 Sex: Male
Privacy Status:

Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility	Attending P
ZZTEST, GEM						

< >

► Paper Documents for ZZTEST, GEM

▼ Delivery Information

Delivery Method
Mail Billable Pre-Bill

▼ Address Information

Print	Bill To	Mail To	Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City
<input type="checkbox"/>			Thir...	5357	test test	test test		Niagara F...

< >

▼ Accounting of Disclosure

AOD Required

Purpose: legal test Description: log a request test test

▼ Request Information

Request Reason: Other Authorization Required Request Status: Initial

Rejection Reason: Chart Unavailable to Provide Duplicate Request Harmful To Individuals/Others

Authorization: Authorized Implied Consent Not Authorized

Request Time: 1:40 PM
Required Date: 06/Sep/2024
Days Overdue: 0

Link to Patient Information Request

Last Updated By: _____

Note: If the patient was not seen at the facility within the requested date, the request can be rejected.



REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

18. Validate pre-loaded Required **Date/Time** field and click **Save**. For ex. **30 days** or **15 days** from the request.



REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

RELEASE OF INFORMATION: REQUEST MANAGEMENT "IF"
PATIENT NOT FOUND

Processing a Rejected Release of Information (ROI) Request:

1. Follow the steps from 1 to 10.
2. Click "x" to Clear.

Request Number	Request Type	Facility	Requester
<New Request>	ROI Non-Bill	St. Catharines Site	law

▼ Patient Information

Patient Name

2 x

Patient Name: ZZTEST, GEM MRN: 11000302
Date of Birth: Sunday, January 1, 1950 Sex: Male
Privacy Status:

Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility	Attending PI
ZZTEST, GEM						

3. Type "Patient Not Found" in the Name field and click Search (Or press Enter)

Person Search

Name
patient Not Found 3

MRN

SSN

Birth Date

Sex

Fin Nbr

Search Clear



REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

4. Highlight HIM ROI, Patient Not Found, and click Select.

4

Name	MRN	CMRN	Birth Date	Sex	Age	SSN	Deceased
PATIENT NOT FOUND, HIM ROI	1000000000	1000000000					

Fin Nbr	Facility	Encounter Type	Registration Date	Discharge Date	Attending Physician
22-001234	SCS	Outpatient	01/Mar/2024 9:58 AM	08/Apr/2024 10:01 AM	Test, IMO --> IMO

Note: If HIM ROI, Patient Not Found does not appear, contact IT/Help desk to add this generic user.

Click Select



REQUEST MANAGEMENT ROI LOG

A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

5. If chart is not found but patient information is present DO NOT UNCHECK AOD , only update Request Reason (if applicable)

AccessHIM - Request Management

File View Help

Search by Name

*Request Invoice Notes Holds XR Template XR Distribute

Request Number: <New Request> Request Type: ROI Non-Bill Facility: St. Catharines Site Requester: law

▼ Patient Information

Patient Name

✖

Patient Name: PATIENT NOT FOUND, HIM ROI MRN: 11000983

Date of Birth: Monday, February 28, 2000 Sex: Male

Privacy Status:

Patient Name	Admit Date	Discharge Date	FIN	Encounter Type	Facility	Attending P
PATIENT NOT FOU						

▼ Paper Documents for PATIENT NOT FOUND, HIM ROI

▼ Delivery Information

Delivery Method

Mail Billable Pre-Bill

▼ Address Information

Print	Bill To	Mail To	Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City
<input type="checkbox"/>			Thir...	5357	test test	test test		Niagara F...

▼ Accounting of Disclosure

AOD Required

Purpose	Description

▼ Request Information

Request Reason: Audit/Medical Review Authorization Required Request Status: Initial

Rejection Reason: Chart Unavailable to Provide Duplicate Request Request Date: 08/Aug/2024 Request Time: 10:15 AM

Required Date: Required Time:



REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

6. Uncheck Authorization Required

Note: For "PATIENT NOT FOUND," AOD can be unchecked. However, if the patient is registered but has no records, **DO NOT uncheck AOD.**

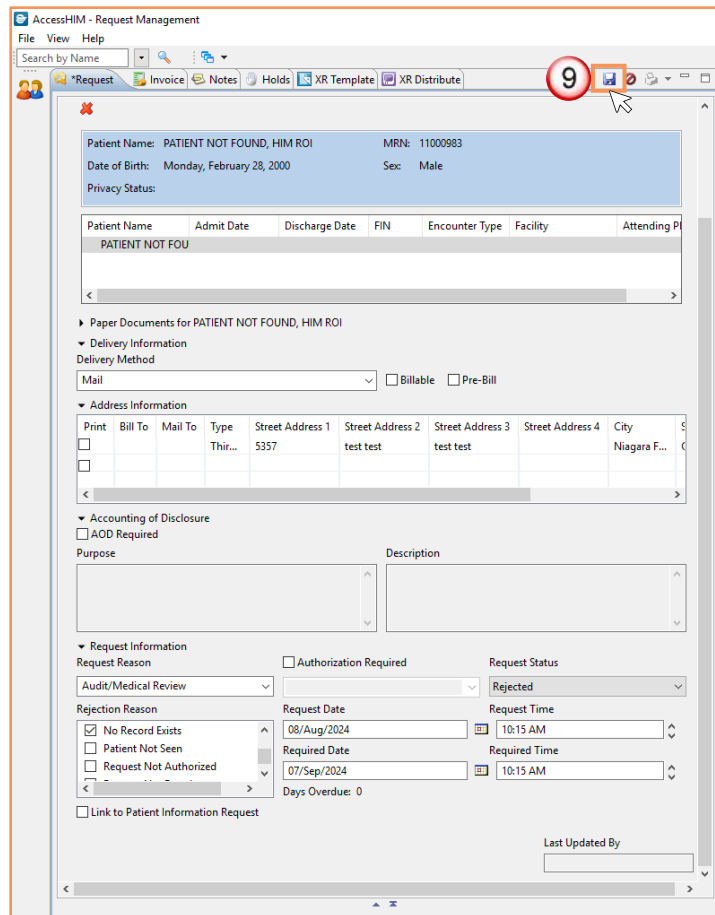
7. Update Request Status to **Rejected**.

8. Rejection Reason(s) box enables. Select Rejection Reason(s)

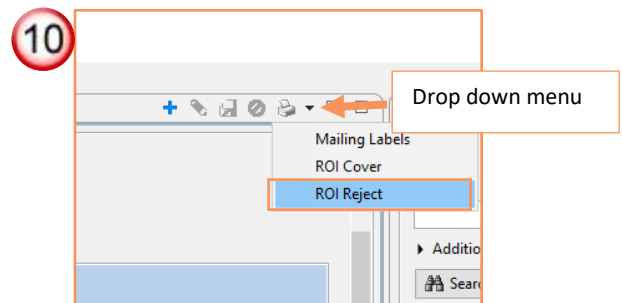


REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND HOSPITAL INFORMATION SYSTEM (HIS)

9. Click **Save**.



10. Click Down Arrow next to Print Icon and select **ROI Reject** letter type.



REQUEST MANAGEMENT ROI LOG A REQUEST & PATIENT NOT FOUND

HOSPITAL INFORMATION SYSTEM (HIS)

11. After selection has been made for each dropdown menu for the rejection letter, Click **Apply** and **Apply and Close**. Then send the Distribute rejection letter to requester.

