

HOSPITAL INFORMATION SYSTEM (HIS)

#### HIM ROI SPECIALISTS

HIM - Release of Information: Request Management (PHIPA Accounting of Disclosures): used for accounting disclosures listed all information that has been released concerning a patient.

1. Log into the **Cerner storefront**.

 Log into AccessHIM as a HIM-TECH/or your login credentials.





3. Storefront Opens.











4. AccessHIM opens.

View Help										
arch by Name	• •						A + 2	1/211-2	0	2 8
Last Updater	d: 2:15:13 PM	4					<u>.</u>			0
Task Type	Task Status	Reason	Patient Name	SSN	MRN	FIN	Admit Date	Discharge Date	Encounter Type	Me
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5. To open **Request Management**, Select the **View tab**.



2

6. From the View tab click Open Perspective, and Request Management.

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File	Viev	w Help									
(6)		Open Perspective	>	23	Registration Se	rvices					
00	°€	Open View	>	()	Request Manag	jemen	t		🚨 🕂 🤅	2 🖉 🛯 🥥	0 👳
		Perspective Layout	>	÷	Task Queue						
		Task Type Task Status	Rea	son	Patient Name	SSN	MRN	FIN	Admit Date	Discharge Date	Encour

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- 7. Log onto the **AppBar** if you have not done so already.
- From the AppBar Click to open the Request Report Maintenance App



9. The **Report Request Maintenance** app opens.

Report Request Main	ntenance						- 0
Task View Help							
Search Criteria Request Status							ii i
All errors Filter	Successful No qualification	Report Request ID	Request Type	Request Status	Person Name	Requesting Personnel	Receiving Personnel
Request Types Ad hoc Expedite Distribution Date Range From 07/26/2021	Manual exped Document ser Concept servi						
Advanced Search>> Clear Refresh List	7 x hh:aa						

10. To begin the **Disclosure Audit Report**, Select the **Request Status Checkbox** next to Successful.









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11. Select the Request Types checkbox next to Ad Hoc, Manual Expedite, Distribution, and Expedite.

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Task	View	Help	
Sear	ch Criter	ia	
Re	quest Sta	tus	
	Pending	9	In process
	All erro	rs <u>Filter</u>	Successful
	Cancele	ed	No qualification
Re	quest Tyr	oes 1	1)
	Ad hoc	2	Manual expedite
	Expedit	e	Document service
	] Distribu	tion	Concept service
-			

12. Select the **Date Range** for the requested **Disclosure Audit Report**.

**Note:** the "To" Field does not need to be populated if current date and time is needed.

Report Request Mainten Task View Help	nance	
Search Criteria		
Request Status		
Pending	] In process	
All errors Filter	Successful	
Canceled	]No qualification	
Request Types		
Ad hoc	Manual expedite	
Expedite	Document service	
Distribution	Concept service	
Date Range		
From 07/26/2024	From × 12	
To mm/dd/yyyy		
Advanced Search>>	Jul ~ 2024 🖨 🔶 🕈	
	SMTWTFS	
Clear Refresh List	30 1 2 3 4 5 6	
	7 8 9 10 11 12 13	
	14 15 16 17 18 19 20	
	21 22 23 24 25 26 27	
	4 5 6 7 8 9 10	





13. Expand the **Advanced Search** Options.

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Advanced Search <<	←
Advanced Search	
Scope	
Person	Cross-Encounter
Encounter	Accession
Order	L Encounter - Selected Events
Report request ID	6
Parent request ID	9
Person name	SCHED, AAINA
Encounter	
Financial Number	
Accession number	
Distribution	
Expedite trigger	
Requesting personnel	
Receiving personnel	
Minimum pages	0
Processing time (sec)	8
Facility	
Concept Service	
Report Template	
Output Device	Enter 3 characters to search all.
Requests for patient	only
Include purged requ	iests

- 14. Search for patient in the Patient Name Field using the magnified glass.
- 15. The Person Search window opens.



15	Name	Dational											>
0	MRN	Patient	R Pre	CMRN	Birth Date	Sex	Age	SSN	Deceased				
		]											
	220												
	Birth Date												
	Sex												
	Fin Nbr												
	Search Clear												
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16. Search for Patient Name, and can also add HCN, and MRN.



17. Highlight the patient's name/MRN

and	CIIC	K S	e	ec	t.

Patient Search											×
Name	Patient 🔍 Preview	N									
SCHED	<u> </u>							1			
MRN AT	Name	MRN	CMRN	Birth Date	Sex	Age	SSN	Deceased			
11002593	SCHED, BRIAN	11002593	100001488	25/May/1980	Male	44 Years		No			
SSN											
Birth Date											
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Search Clear											
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18. Select the "Include Purged Requests" checkbox.

🥺 Report Request Maintenance Task View Help	
Request Status	^
□ Pending     □ In process       □ All errors Filter     ✓ Successful       □ Canceled     □ No qualification	
Request Types	
Ad hoc     Manual expedite       Expedite     Document service       Distribution     Concept service	
Date Range	
From         01/01/2024         00:00           To         mm/dd/yyyy         hh:mm	
Advanced Search <<	
Advanced Search	
Scope	
Person Cross-Encounter	
Encounter     Accession     Event     Encounter - Selected Events     Order	
Report request ID	
Parent request ID	
Person name SCHED. BRIAN	Q.
Encounter	Ň
Financial Number	
Accession number	
Distribution	
Expedite trigger	
Requesting percented	
Receiving personnel	~
Ninimum pages	
Facility	
Report Template	
Output Device V	
Requests for patient only	
Clear Refresh List	~

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19. All appropriate data will populate to the right of the screen. Highlight all relevant rows using **SHIFT or CTRL to select multiple rows.** 

sk View Help	ice												
Request Status		^											
Pending In	process	Last H	(etresh: 7/26/2024 4:3	7 PM EDI									Requests 1 to 2 of 2
All errors Filter	uccessful		0	D	D	D	D	D	D	0	<b>6</b>	Deces Translater	
Canceled N	lo qualification		7091066	Expedite	Report Distri-	SCHED BRI	System Generated	Receiving Personnel	6/18/2024 2:59 PM	Pages 3	Acc	X FSO Template	
Request Types		ŏ	7091064	Expedite	Report Distri	SCHED, BRI	System Generated		6/18/2024 2:59 PM	3	Acc	X_ESO Templ	
Ad hoc	Manual expedite												
Expedite	Document service												
Distribution	Concept service												
Date Range													
From 01/01/2024	00:00												
To an/dd/yyyy	hh:nn												
Advanced Search <<													
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Scope													
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Encounter	Accession												
Drder	Encounter - Selected Events												
Report request ID													
Parent request ID													
Person name Si	CHED, BRIAN												
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Accession number													
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Concept Service	~												
Report Template	~												
Output Device Fi	nter 3 characters to search all.												
Requests for patient on	h												
Include purged requests	5												
Clear Refresh List		× -								_			

20. Right click on the rows and select "Preview Disclosure Audit Report."

	Report Request ID	Request Type	Request Status	Person Name	Requesting Personnel	Receiving Personnel	Requested Date/Time	Pages	Scope	Report Template
0	7091066	Expedite	Report Distri	SCHED, BRI	System Generated		6/18/2024 2:59 PM	3	Acc	X_ESO Templ
0	7091064	Expedite	Report Distri	SCHED, BRI	System Generated		6/18/2024 2:59 PM	3	Acc	Refresh List
_										Resubmit
										Resubmit - Change Parameters
										Resubmit - Debug
		R	ight Clic	k						Cancel Request
										Show Details
		0	n the						0	Display Report
								-	20	Preview Disclosure Audit Report
		SE	elected						$\mathbf{\nabla}$	Save Debug Files
										Save Purge File
										Export Report Request Details





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21. Use the PDF Reader functionality to print to Document Printer, **Close the PDF and, Close the Report Request Maintenance application**.



Note: Do Not Print From PDF Preview.

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Log Request HIPAA Accounting of Disclosures:

1. Switch back to the AccessHIM Window.

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induce the		A Contraction of the second se	Inqueter			Part					Report Number		Tracking D		
		Left Updated D/				S 💊 🗌				٩					
			+ Additional S	karch Critolo											
			afg bearch	_Save Search	n as Default	Load Defaul	ta Uard	late a ta							
			D Pie	Request Requi	ued Type	Patient blane	Field 1	Note Requ	eder Fad	By Store	Report Request Status	Depart Date/Tare	Required Date/Time	<ul> <li>Days Oberdue</li> </ul>	• *
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				- 4											
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			+ Innic Dife	ab.											
			* CIVILATING	111000											

2. Select the Request tab and Select Add Request.

File	cessHIM - Request Managemer View Help	t		
Searc	h <u>by Name</u> Q Request Jalan Invoice	🤁 👻 🌢 Notes) 🥘 Holds) 💽 XR Ti	emplate 🔲 XR Distribute	+ 😒 🗔 ⊘ 🔶 + 🖓 🗖
	Request Number	Request Type	Facility	Request
				Last Updated By
				Last Updated By

3. Select Accounting of Disclosure in the Request Type from the drop-down menu.









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4. Select the **Facility** from the drop-down menu.



5. In the **Requester field**, type in minimum of **3 characters** to search for the Requester. Then Click the **magnifying glass** to **Search** or press **Enter**.

Acc	essHIM - Request Management				
Search	by Name	<b>.</b>			
22	🝳 *Request 🛛 🛃 Invoice 😔	Notes 🕘 Holds 🔯 X	R Template 🔝 XR Distribute	+ 🗞 🖬 🖉 👌	à <b>- □</b>
	Request Number	Request Type	Facility	Requester	<u>^</u>
	<new request=""></new>	ROI Bill	✓ St. Catharines Site	(5) sched	<u> </u>
	<ul> <li>Patient Information</li> <li>Patient Name</li> </ul>			Ŭ	
			<u> </u>		

Notes: The Search a Requester window opens.

Requester Search									×
Search for a Requester									
Requester Name	Reque	iter							
test		Name	Requester Source	Request Reason	n SSN	MRN	Gender	Date of B	irth Age
Requester Source	_	Test, Attorney	Attorney/Legal	Patient Represe	intative				
	~	test, government	Government Agency	y Government					
Request Reason									
	~								
State									
	~								
Zip Code									
	Addres	s(es)							
Search Clear	Type	Street Address 1	Street Address 2	Street Address 3	Street Addres	s4 Ci	ty mark City	State	Zip Code
	1								
	Phone	Number(s)							
	Туре	Phone Number	Extension Contact	t					
								Select	Cancel







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6. Highlight the **Requester** and click **Select**.

		_										
Requester Name		Reques	ter									
test			Name	Requester S	ource	Request Reason	n i	SSN	MRN	Gender	Date of Bi	rth
Requester Source			Test, Attorney	Attorney/Le	egal	Patient Represe	entative					
	~		test, government	Governmer	t Agency	Government						
Request Reason												
Chatta	~											
State												
Zie Cada	`											
		Addros	r(cr)									
		Addres	s(es)									_
Search	Clear	Туре	Street Address 1	Street Ac	dress 2	Street Address 3	Street Ac	dress	4 Cit	У	State	Zip
		ROI	12345 Main Street	t					Ka	nsas City	Missouri	64
		-										
		-										
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		Phone	Number(s)									
		Туре	Phone Number	Extension	Contact							
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		-										
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7. Update the Request Status to Accepted (A), fill out highlighted mandatory fields (B), then click Save Request (C).

7) 🗈 Acce	ssHIM - Reque	st Manager	ment						
File Vi	ew Help								
Search	by Name	- <u> </u>	- <del> </del>		verselata) 🔲 VB Di				F
<b>22</b>	<ul> <li>Request</li> </ul>	invoic	e 🕹 Notes			stribute			
	ж								î
	Patient	Name:			MRN:				
	Date of	Birth:			Sex:				
	Privacy	Status:							
	* Patient	Name	Admit Date	e Discharge [	Date FIN	Encounter Type	Facility	Attending Pl	ł
				-					
	<							>	
	Paper D	ocuments)							
	✓ Delivery	y Informatio	on						
	Email wit	h PHI			V Rillah	le Pre-Bill			
	✓ Address	s Informatio	n						
	Print B	Sill To Ma	il To Type	Street Address 1	Street Address 2	Street Address 3	Street Address 4	City 5	
	۲		ROI	12345 Main Str				Kansas City	
	<							>	
	✓ Accour	nting of Dis	closure						
	Purpose	equired			Descript	ion 📕			
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Ġ	3)				B				
					~			~	
	✓ Reques	t Informatio	on	_					
	Request R	eason		✓ Authoriz	ation Required	Requ	est Status ┥ 🗕 🌘	A	
	Patient R	epresentati D	ve			✓ Initia	al	~	
	Char	rt Unavailah	le to Provide	A 29/Jul/202	e 4	Requ	est Time 19 AM	^	
	Dupl	licate Requ	est	Required Da	ite	Requ	ired Time	v	
	Harr	nful To Indi	viduals/Others	v 28/Aug/20	24		19 AM	\$	
	<			> Days Overd	ue: 0				
	Link to	Patient Info	ormation Requ	est					
							Last Updated	I By	
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8. Click down arrow next to Print and select Accounting of Disclosure to print the Accounting of Disclosure letter and report.

AccessHI	M - Request Management							
File View	Help							
Search by N	lame 🔽 🔍 🗄	° <b>≞</b> -			~			
00 🔍 R	tequest 🛛 🔂 Invoice 😔	Notes 🕘 Holds	🔀 XR Template 厦	XR Distribute	+ \ (8)	💩 🕶 🗖 🗖	🔞 Request Que	ue
<b>**</b>						Mailing La	bels	
Re	equest Number	Request Type		Facility	Requester	Accountin	g of Disclosures 🐧	3
2	273798713	Audit of Disc	losures 🗸	Niagara Falls Site	✓ <u>law</u>	~	requester	
	Patient Information Patient Name		C.				<ul> <li>Additional</li> <li>Additional</li> </ul>	Search (
	×						🔽 Print	Reques
	Patient Name	MRN	Date of Birth	Sex	Privacy Status			27379
	HIMEOURTVEIVE ANV	11001808	Wednesday, May 2	3 Male				27379
	Think Contrinct, Arth.	11001000	weathedday, way 2	io, in Wate				27379
								27379
								27379

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**Completing a Request in Request Management:** 

1. Access the **Request Queue view**, search by **patient name to find** the Request for Patient Name.

D As	nd IN-Equer Management		- 0 ×
5m 23	2) Tara	C C Repetition	© @ + ○ □ LetUpdriet
	Latt Lpond by	Specific         Report         Report         Report         Report         Report         Response         Respo	iue Request Status

2. Patient Search window opens. Select the Patient and click Select.

ame		Patient									
sched		Name	MPN	CMPN	Ritth Date	Sav	Aaa	CON	Deceased		_
IRN			00000042-11000255	000007070	of the date	Sex .	Age De Veren	3314	Deceased		
		SCHED, ADELA	11001722	100001101	01/Jan/ 1996	Female	20 Years				
SN		SCHED, AUCIA	00000114, 11001267	100000726	11/Dee/1005	Female	20 Vees				
		SCHED, ALICIA	00000114; 11001307	00000727	16/Max/1092	Female	41 Vease		Ne		
	-	SCHED, ASHLEY	11000724	1000007877	01/lap/2001	Female	22 Vears		Ver		
rth Date	-0	SCHED, ASHEET	11002593	100001488	25/May/1980	Male	44 Vearc		No		
		SCHED, DRIAN	11002566	100001460	20/Apr/1945	Male	79 Vears		NO		_
x	<u> </u>	SCHED, CHANTALLE	99000062-11000422	000007052	18/Oct/1990	Female	22 Vears				
	~	SCHED, CHRISTIAN GREGORY	88000054: 11000362	000007885	19/May/1957	Male	67 Years				
	¥	SCHED, CORINNE	88000065: 11000357	000007880	02/Dec/1975	Female	48 Years				
n Nbr		SCHED, ELPHIE	88000113: 11000513	000008036	04/Oct/1997	Female	26 Vearc				
		SCHED, JANE	88000063: 11000433	000007953	18/May/1959	Female	65 Years				
		SCHED, JEAN	88000051: 11000396	000007918	20/Apr/1970	Female	54 Years		No		
Search	Clear	SCHED, JEN	88000048: 11000430	000007950	26/Sep/1981	Female	42 Years				
		SCHED, KATIE	88000052: 11000356	000007879	01/Jan/1993	Female	31 Years				
		SCHED KIM	88000112: 11000721	100000069	04/Oct/1967	Prefer not to answer	56 Years				
		SCHED, LINDA MARIE	88000055: 11000363	000007886	01/Jul/1960	Female	64 Years				
		SCHED, ROMEO	11001135	100000495	28/May/1995	Male	29 Years				
		SCHED RONNIE	11000729-88000066	000008033	01/Jan/1988	Male	36 Years		No		
		SCHED TANIA	11000764	100000111	01/Aug/1995	Female	28 Years				
		SCHED, TAYLOR	88000061: 11000431	000007951	16/Sep/1982	Female	41 Years				
		SCHED TEST	88000096: 11000719	100000067	01/lan/1953	Female	71 Vears				
		SCHED TESTT	88000097: 11000720	100000068	01/Jan/1955	Male	69 Years				
										 	_







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3. Double click the request, navigate to the Request tab and click Modify Request.

Search	by Name   Request  Invoice	Rarana Rotes () H	olds 🔯 XR Template 🗐 XR	Distribute	+ 💊 2 0 💩 - 🖻
	Request Number	Request	Type Facil	ity	Requester
	273802361	Audit o	f Disclosures V Nia	gara Falls Site	Modify request
			q		
	*				
	X Patient Name	MRN	Date of Birth	Sex	Privacy Status

4. Update the Request Status to Complete (A) and click Save Request (B).

File Vi	ev Help y Name  Q Invoice  Notes Holds XR Template XR Distribute Request Number Request Type Facility CNew Request> Audit of Disclosures  Patient Information Patient Name Q	Requester Save Request	Accepted Canceled Canceled Extension Patie Chart Request Da 29/JU/202	Requested nt Not Seen t Unavailable to Provice te 24	ie v Request Time I 10:04 AM		
	Patient Name MRN Date of Birth Sex HIMFOURTYFIVE, ANY 11001808 Wednesday, May 23, Male	Privacy Status	Required D	024	I 10:04 AM	0	Days Overdue: 0
	Patient Information on Site  Request Information Request Status  Complete  Rejection Reason  Duplicate Request  No Record Exists  Patient Not Seen  Chart Unavailable to Provide  Request Date  Required Date  Required Time  29/Aug/2024  1044 AM  Days Overdue: 0						

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