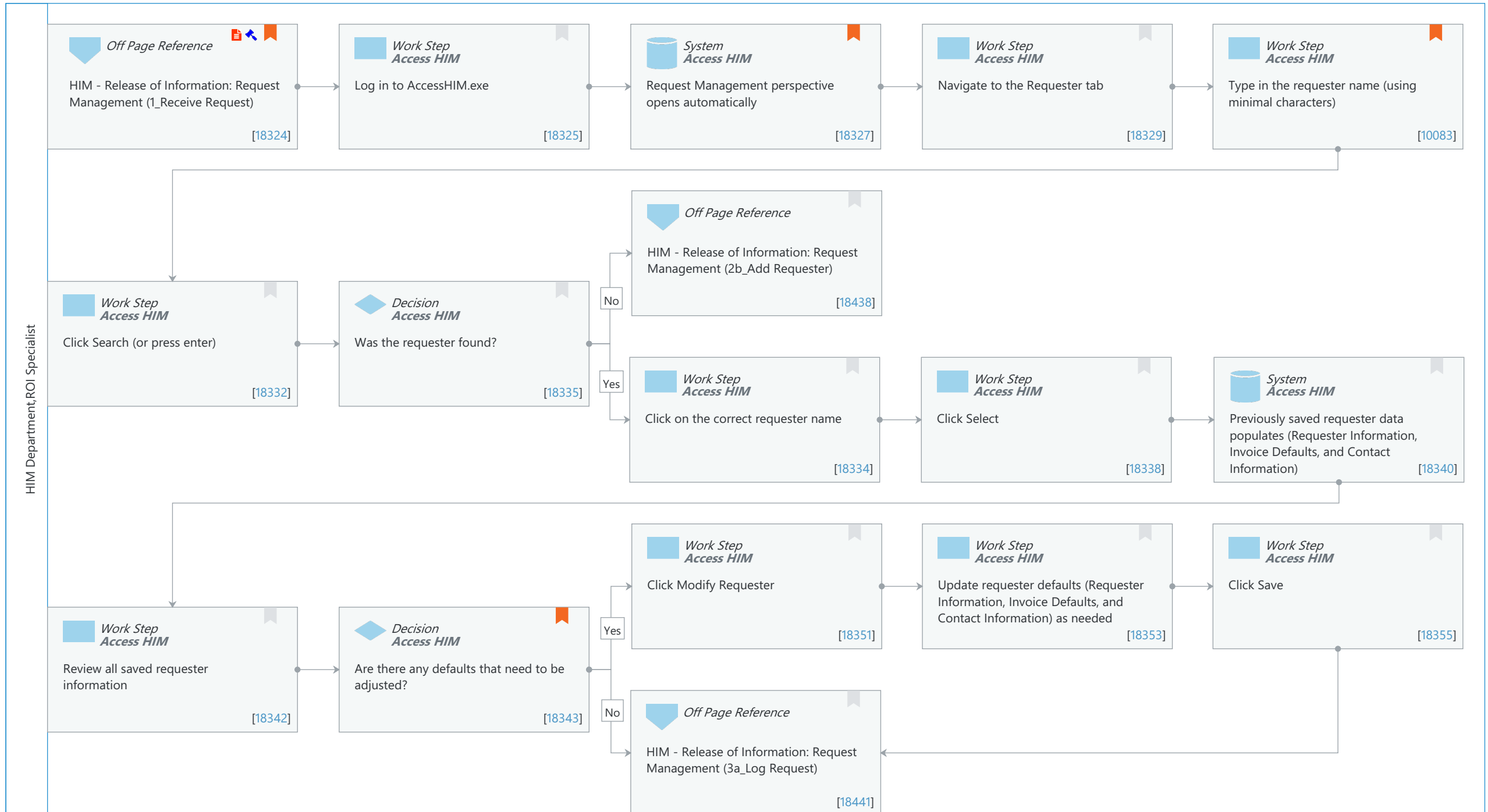


Future State: HIM - Release of Information: Request Management (2a_Update Requester)

Cerner Workflow ID: 296 (v. 18.0)

Client Workflow ID: 511

Last updated by Mayank Malik, Feb 15, 2024 3:55pm (UTC -4 hours)



Future State: HIM - Release of Information: Request Management (2a_Update Requester)

Cerner Workflow ID: 296 (v. 18.0) Client Workflow ID: 511

Last updated by Mayank Malik, Feb 15, 2024 3:55pm (UTC -4 hours)

Workflow Details:

Workflow Name: HIM - Release of Information: Request Management (2a_Update Requester)

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: 296 (v. 18.0)

Client Workflow ID: 511

Workflow Notes: For the steps to configure and follow the workflow, see [Understand Request Management Workflows](#).

This workflow provides the steps to view and update a previously logged requester to ensure the requester's information is accurate before logging the request. If the requester has not been previously logged, another workflow is referenced that provides the steps to add a new requester before logging the request.

Introduced By: WS 4

Validated By: WS 6

Swim Lane:

Role(s): HIM Department

ROI Specialist [Custom]

Department(s): Health Information Management

Security Position(s): HIM - ROI

Off Page Reference [18324]

Workflow Link: HIM - Release of Information: Request Management (1_Receive Request)

Future State: HIM - Release of Information: Request Management (2a_Update Requester)

Cerner Workflow ID: 296 (v. 18.0) Client Workflow ID: 511

Last updated by Mayank Malik, Feb 15, 2024 3:55pm (UTC -4 hours)

Step Impact: Policy/Procedure
Regulatory

Regulatory Details: Health Insurance Portability and Accountability Act (HIPAA)
Information Blocking

Work Step [18325]

Description: Log in to AccessHIM.exe
Method: Access HIM

System [18327]

Description: Request Management perspective opens automatically
Method: Access HIM
Comments: This default setting is a user preference recommendation for all HIM ROI Specialists.

Work Step [18329]

Description: Navigate to the Requester tab
Method: Access HIM

Work Step [10083]

Description: Type in the requester name (using minimal characters)
Method: Access HIM
Comments: Using minimal characters helps to minimize requester duplicates.

Off Page Reference [18438]

Workflow Link: HIM - Release of Information: Request Management (2b_Add Requester)

Work Step [18332]

Description: Click Search (or press enter)
Method: Access HIM

Decision [18335]

Description: Was the requester found?
Method: Access HIM

Work Step [18334]

Description: Click on the correct requester name

Future State: HIM - Release of Information: Request Management (2a_Update Requester)

Cerner Workflow ID: 296 (v. 18.0) Client Workflow ID: 511

Last updated by Mayank Malik, Feb 15, 2024 3:55pm (UTC -4 hours)

Method: Access HIM

Work Step [18338]

Description: Click Select

Method: Access HIM

System [18340]

Description: Previously saved requester data populates (Requester Information, Invoice Defaults, and Contact Information)

Method: Access HIM

Work Step [18351]

Description: Click Modify Requester

Method: Access HIM

Work Step [18353]

Description: Update requester defaults (Requester Information, Invoice Defaults, and Contact Information) as needed

Method: Access HIM

Work Step [18355]

Description: Click Save

Method: Access HIM

Work Step [18342]

Description: Review all saved requester information

Method: Access HIM

Decision [18343]

Description: Are there any defaults that need to be adjusted?

Method: Access HIM

Comments: Requester details specific to the request should not be made at this time. For example, delivery method of fax for this request only can be updated when logging and processing the request in the Request Tab.

Off Page Reference [18441]

Workflow Link: HIM - Release of Information: Request Management (3a_Log Request)