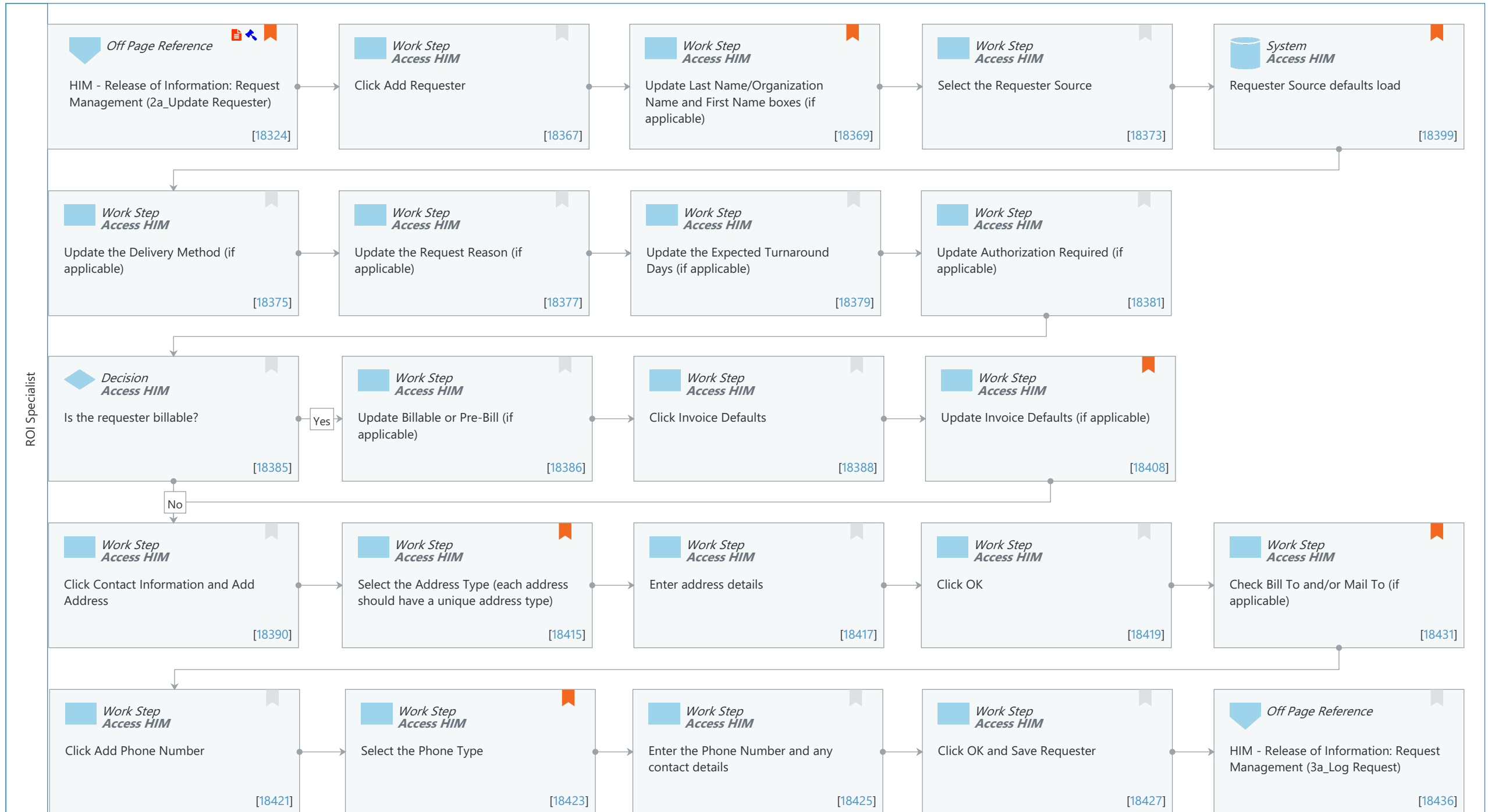


Future State: HIM - Release of Information: Request Management (2b_Add Requester)

Cerner Workflow ID: 10397 (v. 12.0)

Client Workflow ID: 512

Last updated by Mayank Malik, Feb 14, 2024 11:04pm (UTC -4 hours)



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

Cerner Workflow ID: 10397 (v. 12.0) Client Workflow ID: 512

Last updated by Mayank Malik, Feb 14, 2024 11:04pm (UTC -4 hours)

Workflow Details:

Workflow Name: HIM - Release of Information: Request Management (2b_Add 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: 10397 (v. 12.0)

Client Workflow ID: 512

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

This workflow provides the steps to add a new requester to the database. Requester defaults populate based on the requester source, if previously defined. Adding requesters to the database decreases data entry if the requester submits another request in the future.

Introduced By: WS 4

Validated By: WS 6

Swim Lane:

Role(s): 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 (2a_Update Requester)

Step Impact: Policy/Procedure
Regulatory

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

Cerner Workflow ID: 10397 (v. 12.0) Client Workflow ID: 512

Last updated by Mayank Malik, Feb 14, 2024 11:04pm (UTC -4 hours)

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

Work Step [18367]

Description: Click Add Requester

Method: Access HIM

Work Step [18369]

Description: Update Last Name/Organization Name and First Name boxes (if applicable)

Method: Access HIM

Comments: Current system issue: The system does not print the Requester's name on the rejection letter if the First Name field is blank.

Work Step [18373]

Description: Select the Requester Source

Method: Access HIM

System [18399]

Description: Requester Source defaults load

Method: Access HIM

Comments: These defaults are configured on the Requester Defaults tab and include:

- Delivery Method
- Request Reason
- Expected Turnaround Days
- Authorization Required
- Billable
- Invoice defaults

Work Step [18375]

Description: Update the Delivery Method (if applicable)

Method: Access HIM

Work Step [18377]

Description: Update the Request Reason (if applicable)

Method: Access HIM

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

Cerner Workflow ID: 10397 (v. 12.0) Client Workflow ID: 512

Last updated by Mayank Malik, Feb 14, 2024 11:04pm (UTC -4 hours)

Work Step [18379]

Description: Update the Expected Turnaround Days (if applicable)

Method: Access HIM

Work Step [18381]

Description: Update Authorization Required (if applicable)

Method: Access HIM

Decision [18385]

Description: Is the requester billable?

Method: Access HIM

Work Step [18386]

Description: Update Billable or Pre-Bill (if applicable)

Method: Access HIM

Work Step [18388]

Description: Click Invoice Defaults

Method: Access HIM

Work Step [18408]

Description: Update Invoice Defaults (if applicable)

Method: Access HIM

Comments: Use the Electronic field to represent the number of pages printed from Clinical Reporting XR.

Work Step [18390]

Description: Click Contact Information and Add Address

Method: Access HIM

Work Step [18415]

Description: Select the Address Type (each address should have a unique address type)

Method: Access HIM

Comments: It is recommended to enter a unique address type or the system may overwrite the first address. To avoid this issue, select Business, Mailing, etc.

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

Cerner Workflow ID: 10397 (v. 12.0) Client Workflow ID: 512

Last updated by Mayank Malik, Feb 14, 2024 11:04pm (UTC -4 hours)

Work Step [18417]

Description: Enter address details

Method: Access HIM

Work Step [18419]

Description: Click OK

Method: Access HIM

Work Step [18431]

Description: Check Bill To and/or Mail To (if applicable)

Method: Access HIM

Comments: If the requester is marked as Billable, a Bill To address must be selected before saving the requester. If the requester delivery method is Mailing, a Mail To address must be selected before saving the requester.

Work Step [18421]

Description: Click Add Phone Number

Method: Access HIM

Work Step [18423]

Description: Select the Phone Type

Method: Access HIM

Comments: Recommend Business or Fax Business (for fax numbers)

Work Step [18425]

Description: Enter the Phone Number and any contact details

Method: Access HIM

Work Step [18427]

Description: Click OK and Save Requester

Method: Access HIM

Off Page Reference [18436]

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