



Future State: HIM - Release of Information: Request Management (3a_Log Request)

Cerner Workflow ID: 308 (v. 17.0) Client Workflow ID: 513

Last updated by Mayank Malik, Feb 15, 2024 1:31pm (UTC -4 hours)

Workflow Details:

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

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):

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

This workflow provides the steps for logging a request in Request Management. If the request needs to be rejected, a rejection reason can be specified and a rejection letter can be printed. If the request is ready to be processed, follow the Process Request workflow.

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 [10519]

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

Comments: or HIM - Release of Information: Request Management (2b_Add

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Requester)

Work Step [24822]

Description: Select the Request Tab

Method: Access HIM

Work Step [24678]

Description: Click Add Request

Method: Access HIM

Work Step [24680]

Description: Select Request Type (ROI Bill, ROI Non-Bill, ROI Pre-Bill)

Method: Access HIM

Work Step [24683]

Description: Select the Facility

Method: Access HIM

Comments: Only one facility can be selected per request. A default facility cannot be set.

Work Step [24685]

Description: Click Requester Search

Method: Access HIM

Work Step [24687]

Description: Type the Requester's Name using minimal characters

Method: Access HIM

Work Step [24689]

Description: Click Search (or press enter)

Method: Access HIM

Work Step [24691]

Description: Highlight the Requester

Method: Access HIM

Comments: This step assumes that the user followed the workflow HIM - Release of Information: Request Management (2_Add or Update Requester)

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Work Step [24693]

Description: Click Select

Method: Access HIM

Work Step [24695]

Description: Click Patient Search

Method: Access HIM

Work Step [24697]

Description: Enter the patient's DOB, MRN,HCN (if applicable) and/or Name

Method: Access HIM

Comments: This will depend on the information the requester provides. It is recommended to enter in DOB.

Work Step [24701]

Description: Click Search

Method: Access HIM

Decision [24850]

Description: Is the patient found?

Off Page Reference [24852]

Workflow Link: HIM - Release of Information: Request Management (3b_Patient Not Found)

Work Step [24845]

Description: Highlight the encounter(s)

Method: Access HIM

Comments: If no encounter is selected, the request will be made at the person level. To multi-select encounters, use the CTRL+ or SHIFT+ keys.

Starting with 2018.10, users can select encounters at facilities outside of the facility defined in the Facility dropdown. This enhancement allows organizations to create a single ROI request for encounters that span more than one facility.

Work Step [24847]

Description: Click Select

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Method: Access HIM

Work Step [24708]

Description: Select Paper Document(s) (if applicable)

Method: Access HIM

Comments: Paper documents may include microfilm, archive records, and anything not printed through Cerner Clinical Reporting XR.

Work Step [24710]

Description: Validate and update the Delivery Method (if applicable)

Method: Access HIM

Work Step [24712]

Description: Validate and update Billable or Pre-Bill check box (if applicable)

Method: Access HIM

Work Step [24714]

Description: Validate the correct address is checked for Bill To (if Billable) and Mail To (if Mailing)

Method: Access HIM

Comments: Billing address will appear on the request's invoice. Mailing address will appear on the mailing label and ROI letters.

Decision [24731]

Description: Is the request eligible for Accounting of Disclosures?

Method: Access HIM

Step Impact: Regulatory

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

Comments: Eligible requests include those that are not for TPO (Treatment, Payment, Operations).

Work Step [24716]

Description: Enter AOD Purpose (Required)

Method: Access HIM

Comments: This field displays on the Accounting of Disclosure letter that prints when an Accounting of Disclosure Request Type is completed within Request Management. Enter the request reason and elaborate if needed.

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Work Step [24717]

Description: Enter AOD Description (Required)

Method: Access HIM

Comments: This field displays on the Accounting of Disclosure letter that prints when an Accounting of Disclosure Request Type is completed within Request Management. Enter dates (Entire Chart 1/1/2010-12/31/2012) or other applicable details. Enter the Report Request ID to connect the Request to the Clinical Reporting XR solution.

Work Step [24733]

Description: Uncheck AOD Required

Method: Access HIM

Work Step [24720]

Description: Validate and update Request Reason (if applicable)

Method: Access HIM

Work Step [24725]

Description: Validate and update Authorization Required check box (if applicable)

Method: Access HIM

Work Step [24727]

Description: Select Authorized, Implied Consent, or Not Authorized per organization policies

Method: Access HIM

Decision [24836]

Description: Is there any other reason the request should be rejected?

Method: Access HIM

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

Work Step [24741]

Description: Validate pre-loaded Required Date/Time field and update (if applicable)

Method: Access HIM

Work Step [24743]

Description: Click Save

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Method: Access HIM

Off Page Reference [24745]

Workflow Link: HIM - Release of Information: Request Management (4a_Process Request)

Decision [10522]

Description: Is the requester authorized (or implied consent applied)?

Method: Access HIM

Work Step [24839]

Description: Update Request Status to Rejected

Method: Access HIM

System [24752]

Description: Request Status automatically updates to Rejected and Rejection Reason(s) box enables

Method: Access HIM

Work Step [24750]

Description: Select Rejection Reason(s)

Method: Access HIM

Work Step [24755]

Description: Click Save

Method: Access HIM

Comments: Request cannot be modified once it is rejected.

Work Step [24757]

Description: Click Down Arrow next to Print Icon

Method: Access HIM

Work Step [24759]

Description: Select ROI Reject letter type

Method: Access HIM

Start/Stop [24761]

Description: Distribute rejection letter to requester

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