Niagara Health System

Oct 16, 2024

Future State: HIM - Release of Information: Request Management (4a_Process Request)

Cerner Workflow ID: 329 (v. 21.0)   Client Workflow ID: 515   Last updated by Mayank Malik, Feb 15, 2024 2:59pm (UTC -4 hours)

HIM Department;ROI Specialist

Off Page Reference
HIM - Release of Information: Request Management (3a_Log Request)
[24760]

Decision
Is the request open in the Request tab?
[24762]

— No → **Work Step / Access HIM**
Navigate to the Request Queue tab
[24772]

→ **Work Step / Access HIM**
Enter search criteria (request number, requester, patient, etc)
[24774]

→ **Work Step / Access HIM**
Click Search
[24776]

→ **Work Step / Access HIM**
Highlight request
[24778]

→ **Work Step / Access HIM**
Navigate to the Request tab
[24779]

— Yes → **Work Step / Access HIM**
Review request details
[24782]

Off Page Reference
HIM - Release of Information: Request Management (4b_Review Chart)
[25044]

Decision
Is the request ready to be processed?
[24839]

— No → **Off Page Reference**
HIM - Release of Information: Request Management (4e_ROI Hold)
[25025]

— Yes → **Decision**
Is the request across multiple date ranges?
[24765]

— Yes → **Off Page Reference**
Clinical Reporting - Report Request - Encounter
[24766]

— No → **Work Step / Access HIM**
Click XR Template tab
[24770]

→ **Work Step / Access HIM**
Select the appropriate XR template
[24788]

→ **Work Step / Access HIM**
Select individual sections (if applicable)
[24790]

→ **Work Step / Access HIM**
Select the XR Distribute tab
[24792]

→ **Work Step / Access HIM**
Click Preview Report
[24798]

Decision
Is this a billable request?
[24872]

— Yes → **Off Page Reference**
HIM - Release of Information: Request Management (4c_Invoice Billable)
[25022]

— No → **Work Step / Access HIM**
Select a distribution method in the Send to box (fax, secure email, printer, file share, etc.)
[24802]

→ **Work Step / Access HIM**
Click Send Report
[24806]

→ **Work Step / Access HIM**
Select the Request tab
[24808]

Decision
Is the request waiting for pickup?
[24819]

— Yes → **Work Step / Access HIM**
Click Modify Request
[24822]

→ **Work Step / Access HIM**
Update Request Status to Waiting for Pickup
[24824]

— No → **Work Step / Access HIM**
Click Modify Request
[24810]

→ **Work Step / Access HIM**
Update Request Status to Complete
[24812]

→ **Start/Stop / Access HIM**
Click Save Request
[24815]

Cerner Workflow ID: 329 (v. 21.0)   Client Workflow ID: 515   Last updated by Mayank Malik, Feb 15, 2024 2:59pm (UTC -4 hours)

Workflow Details:

Workflow Name:	HIM - Release of Information: Request Management (4a_Process 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):	Cerner Document Imaging
	Health Information Management
	Clinical Reporting XR
Project Name:	Niagara Health System:OPT-0297674:NIAG_CD Niagara HIS RFP
TestBuilder Script(s):	
Cerner Workflow ID:	329 (v. 21.0)
Client Workflow ID:	515
Workflow Notes:	For the steps to configure and follow the workflow, see Understand Request Management Workflows .
	This workflow provides the steps to process and complete a release of information request that was logged in Request Management. Clinical Reporting XR templates are used for distributing the records. Additional workflows for chart review, invoices, or holds may be required for 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 [24760]

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

Decision [24762]

    Description: Is the request open in the Request tab?

Work Step [24772]

    Description: Navigate to the Request Queue tab

        Method: Access HIM

Work Step [24774]

    Description: Enter search criteria (request number, requester, patient, etc)

        Method: Access HIM

Work Step [24776]

    Description: Click Search

        Method: Access HIM

Work Step [24778]

    Description: Highlight request

        Method: Access HIM

Work Step [24779]

    Description: Navigate to the Request tab

        Method: Access HIM

Work Step [24782]

    Description: Review request details

        Method: Access HIM

Off Page Reference [25044]

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

Off Page Reference [25025]

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

Work Step [24770]

    Description: Click XR Template tab

        Method: Access HIM

Work Step [24788]

    Description: Select the appropriate XR template

        Method: Access HIM

     Comments: Templates available in the drop down are based on the position's Clinical Reporting template security. A user can define a default template in their Request Management/Template Preferences.

Work Step [24790]

    Description: Select individual sections (if applicable)

        Method: Access HIM

Work Step [24792]

    Description: Select the XR Distribute tab

        Method: Access HIM

Work Step [24798]

    Description: Click Preview Report

        Method: Access HIM

     Comments: Only one encounter can be previewed at a time.

                 Do not print or save the chart through the PDF Reader. Doing so eliminates the audit trail of the release which is used for capturing the release details in the disclosure audit report.

Decision [24839]

    Description: Is the request ready to be processed?

Decision [24765]

    Description: Is the request across multiple date ranges?

     Comments: Note: Default Clinical Reporting settings are Encounter level scope and Verified. A user can define a different default scope and event status if applicable.

Cerner Workflow ID: 329 (v. 21.0)   Client Workflow ID: 515   Last updated by Mayank Malik, Feb 15, 2024 2:59pm (UTC -4 hours)

Off Page Reference [24766]
    Workflow Link: Clinical Reporting - Report Request - Encounter

Off Page Reference [25022]
    Workflow Link: HIM - Release of Information: Request Management (4c_Invoice Billable)

Decision [24872]
    Description: Is this a billable request?

Work Step [24824]
    Description: Update Request Status to Waiting for Pickup
        Method: Access HIM

Work Step [24822]
    Description: Click Modify Request
        Method: Access HIM

Decision [24819]
    Description: Is the request waiting for pickup?

Work Step [24808]
    Description: Select the Request tab
        Method: Access HIM

Work Step [24806]
    Description: Click Send Report
        Method: Access HIM

Work Step [24802]
    Description: Select a distribution method in the Send to box (fax, secure email, printer, file
                  share, etc.)
        Method: Access HIM
    Step Impact: Regulatory
  Regulatory Details: Conditions of Participation
                  The Joint Commission (TJC)
      Comments: §482.13(d)(2) Patient Rights
               TJC: RI.01.01.01

Work Step [24810]

    Description: Click Modify Request

        Method: Access HIM

Work Step [24812]

    Description: Update Request Status to Complete

        Method: Access HIM

Start/Stop [24815]

    Description: Click Save Request

        Method: Access HIM