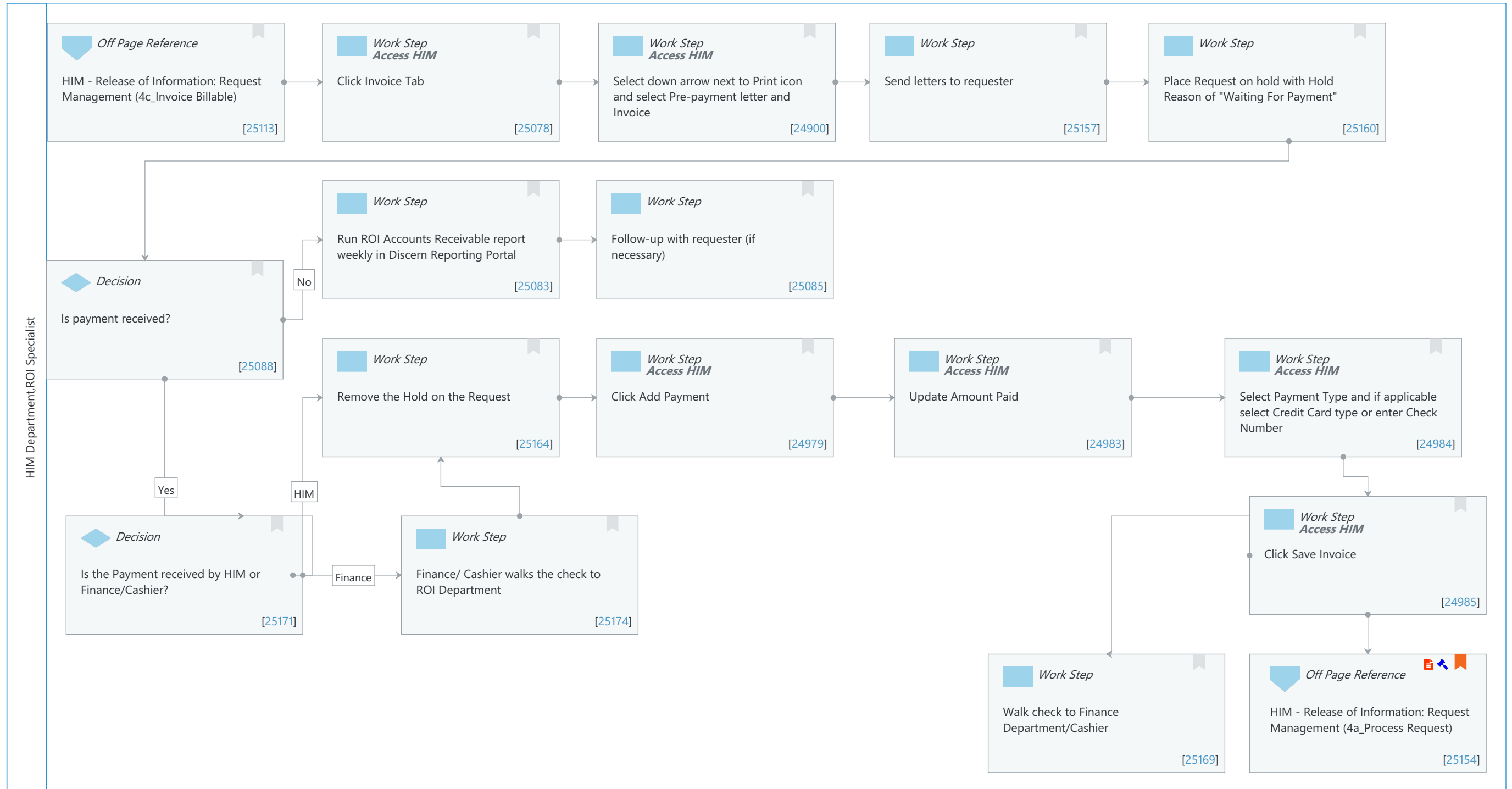


Future State: HIM - Release of Information: Request Management (4d\_Invoice Pre-Billable)

Cerner Workflow ID: 10405 (v. 12.0)

Client Workflow ID: 518

Last updated by Mayank Malik, Feb 15, 2024 12:56pm (UTC -4 hours)



## Future State: HIM - Release of Information: Request Management (4d\_Invoice Pre-Billable)

Cerner Workflow ID: 10405 (v. 12.0) Client Workflow ID: 518

Last updated by Mayank Malik, Feb 15, 2024 12:56pm (UTC -4 hours)

**Workflow Details:**

Workflow Name: HIM - Release of Information: Request Management (4d\_Invoice Pre-Billable)

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

Clinical Reporting XR

Project Name: Niagara Health System:OPT-0297674:NIAG\_CD Niagara HIS RFP

TestBuilder Script(s):

Cerner Workflow ID: 10405 (v. 12.0)

Client Workflow ID: 518

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

This workflow provides steps for sending a pre-payment letter and invoice to the requester for a

pre-billable request. Once payment is received, payment is added to the invoice and the Process Request workflow is followed to send the records to the requester.

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 [25113]**

Workflow Link: HIM - Release of Information: Request Management (4c\_Invoice Billable)

## Future State: HIM - Release of Information: Request Management (4d\_Invoice Pre-Billable)

Cerner Workflow ID: 10405 (v. 12.0) Client Workflow ID: 518

Last updated by Mayank Malik, Feb 15, 2024 12:56pm (UTC -4 hours)

**Work Step** [25078]

Description: Click Invoice Tab

Method: Access HIM

**Work Step** [24900]

Description: Select down arrow next to Print icon and select Pre-payment letter and Invoice

Method: Access HIM

**Work Step** [25157]

Description: Send letters to requester

**Work Step** [25160]

Description: Place Request on hold with Hold Reason of "Waiting For Payment"

**Work Step** [25083]

Description: Run ROI Accounts Receivable report weekly in Discern Reporting Portal

**Work Step** [25085]

Description: Follow-up with requester (if necessary)

**Decision** [25088]

Description: Is payment received?

**Work Step** [25164]

Description: Remove the Hold on the Request

**Work Step** [24979]

Description: Click Add Payment

Method: Access HIM

**Work Step** [24983]

Description: Update Amount Paid

Method: Access HIM

**Work Step** [24984]

Description: Select Payment Type and if applicable select Credit Card type or enter Check Number

## Future State: HIM - Release of Information: Request Management (4d\_Invoice Pre-Billable)

Cerner Workflow ID: 10405 (v. 12.0) Client Workflow ID: 518

Last updated by Mayank Malik, Feb 15, 2024 12:56pm (UTC -4 hours)

Method: Access HIM

**Decision** [25171]

Description: Is the Payment received by HIM or Finance/Cashier?

**Work Step** [25174]

Description: Finance/ Cashier walks the check to ROI Department

**Work Step** [24985]

Description: Click Save Invoice

Method: Access HIM

**Work Step** [25169]

Description: Walk check to Finance Department/Cashier

**Off Page Reference** [25154]

Workflow Link: HIM - Release of Information: Request Management (4a\_Process Request)

Step Impact: Policy/Procedure  
Regulatory

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