Future State: HIM - Release of Information: Request Management (External Auditor Requests)

Cerner Workflow ID: 6076 (v. 17.0) Client Workflow ID: 521

Last updated by Debbie Begin, Jan 26, 2024 5:16pm (UTC -4 hours)

Outside Agency

Start/Stop
Send list of encounter(s) to review electronically [37]

Work Step **PowerChart**
In PowerChart, click List Maintenance [25]

Work Step **PowerChart**
Select the patient list and move the list from Available Lists to Active Lists and click OK [41]

Work Step **PowerChart**
Double click a patient in patient list to review the patient's chart [43]

HIM Department

Off Page Reference
HIM - Release of Information: Request Management (1_Receive Request) [32]

Work Step **PowerChart**
In PowerChart, click Patient List and click List Maintenance [6]

Work Step **PowerChart**
Click New, click Custom, and click Next [7]

Work Step **PowerChart**
Enter a name for the custom list and click Next [8]

Work Step **PowerChart**
Click New in the Proxy window [13]

Work Step **PowerChart**
Select the Provider option and search for the auditor in the Provider field [46]

Work Step **PowerChart**
Select Read Access and enter a date range [14]

Work Step **PowerChart**
Click Apply and click Finish [47]

Work Step **PowerChart**
Move the patient list from Available Lists to Active Lists and click OK [15]

Work Step **PowerChart**
Click Add Patient, search for the patient, select the correct encounter, and click OK [19]

Work Step **PowerChart**
Add additional patients as necessary [48]

Off Page Reference
HIM - Release of Information: Request Management (2a_Update Requester) [26]

Work Step **PowerChart**
When the auditor has completed their review, click List Maintenance [56]

Work Step **PowerChart**
Select the patient list and move it from Active Lists to Available Lists [57]

Start/Stop **PowerChart**
Right click the patient list and click Delete Patient List [24]

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Future State: HIM - Release of Information: Request Management (External Auditor Requests)

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Workflow Details:

Workflow Name: HIM - Release of Information: Request Management (External Auditor Requests)
Workflow State: Future State
Workstream: Post-Discharge/Post-Visit
Venue: Acute Care
Emergency Medicine
Perioperative
Facilities:
Client Owner:
Cerner Owner:
Standard: Yes
Related Workflow(s):
Tags:

Workflow Summary:

Service Line:
Related Solution(s): Health Information Management
PowerChart
Project Name: Niagara Health System:OPT-0297674:NIAG_CD Niagara HIS RFP
TestBuilder Script(s):
Cerner Workflow ID: 6076 (v. 17.0)
Client Workflow ID: 521
Workflow Notes: For the steps to configure and follow the workflow, see Understand External Auditor Workflows.

This workflow provides the steps to follow when an external auditor, such as an insurance company,
requests to view one or more patient records electronically. By creating a custom patient list in PowerChart, the HIM department controls which patients an auditor can view. Once the patient list is created, it is recommended to log the request in the Request Management application for tracking purposes. The auditor logs into PowerChart using the View Only - Chart Review position to review patient charts from the custom patient list.

Introduced By: WS 4
Validated By: WS 6

Swim Lane:

Role(s): Outside Agency
Department(s):
Security Position(s): VIEW ONLY - CHART REVIEW

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Start/Stop [37]
Description: Send list of encounter(s) to review electronically

Work Step [25]
Description: In PowerChart, click List Maintenance
Method: PowerChart

Work Step [41]
Description: Select the patient list and move the list from Available Lists to Active Lists and click OK
Method: PowerChart

Work Step [43]
Description: Double click a patient in patient list to review the patient's chart
Method: PowerChart

Swim Lane:
Role(s): HIM Department
Department(s): Health Information Management
Security Position(s): HIM - ROI
HIM - Managers

Off Page Reference [32]
Workflow Link: HIM - Release of Information: Request Management (1_Receive Request)

Work Step [6]
Description: In PowerChart, click Patient List and click List Maintenance
Method: PowerChart

Work Step [7]
Description: Click New, click Custom, and click Next
Method: PowerChart

Work Step [8]
Description: Enter a name for the custom list and click Next
Method: PowerChart

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Work Step [13]
Description: Click New in the Proxy window
Method: PowerChart

Work Step [56]
Description: When the auditor has completed their review, click List Maintenance
Method: PowerChart

Work Step [46]
Description: Select the Provider option and search for the auditor in the Provider field
Method: PowerChart
Comments: The auditor user should be configured under the View Only - Chart Review position since this position has limited access in PowerChart.

Work Step [14]
Description: Select Read Access and enter a date range
Method: PowerChart

Work Step [47]
Description: Click Apply and click Finish
Method: PowerChart

Work Step [15]
Description: Move the patient list from Available Lists to Active Lists and click OK
Method: PowerChart

Work Step [19]
Description: Click Add Patient, search for the patient, select the correct encounter, and click OK
Method: PowerChart

Work Step [48]
Description: Add additional patients as necessary
Method: PowerChart

Work Step [57]
Description: Select the patient list and move it from Active Lists to Available Lists

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Method: PowerChart

Off Page Reference [26]

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

Step Impact: Policy/Procedure
Regulatory

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

Start/Stop [24]

Description: Right click the patient list and click Delete Patient List

Method: PowerChart

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