



Future State: HIM - ERM: Lockbox Process

Cerner Workflow ID: Client Workflow ID: 1066

Last updated by Debbie Begin, Nov 06, 2024 4:33pm (UTC -5 hours)

Workflow Details:

Workflow Name: HIM - ERM: Lockbox Process

Workflow State: Future State

Workstream: Post-Discharge/Post-Visit

Venue: Acute Care
Ambulatory

Client Owner: Begin, Debbie

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): HIM- Lockbox Process

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Workflow Notes:

Introduced By: WS 5

Validated By: WS 8

Swim Lane:Role(s): HIM Manager [Custom]
HIM Director/ Manager Privacy [Custom]

Department(s): Health Information Management

Security Position(s):

Start/Stop [3]

Description: Patient requests lockbox restriction.

Document [4]

Description: Patient completes the "Lockbox Request Form" for lockbox restriction of discharged encounter(s).

Work Step [5]

Description: Access the "Lockbox Create/Release"Conversation from Access Management Office/ PMOffice

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Work Step [7]

Description: Search for the patient and select Correct Encounter to add Lockbox To the Encounter

Work Step [6]

Description: Then select OK.

Work Step [8]

Description: Lockbox Create/Release message populates "Are you placing a lockbox on an encounter?" Select Yes

System [12]

Description: Lockbox Create/Release conversation opens

Work Step [11]

Description: Modify Registration Date and Time if applicable. Add comment in Lockbox Comment section if needed

System [15]

Description: Lockbox Create/Release conversation opens. Confidentiality level field is defaulted "Lockbox"

Decision [16]

Description: Is this a recurring encounter?

Work Step [13]

Description: Message will populate "Encounter selected is a Recurring type. Would you like to create new encounter?" Select No.

Work Step [17]

Description: Enter comment in Lockbox Comments if needed

Work Step [18]

Description: Select OK to Confirm changes

Decision [19]

Description: Does the patient require the Lockbox to be lifted?

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Start/Stop [20]

Description: Monitor Lockbox worklist in Access Management Office PM Office. Review locked/privacy encounters as needed.

Work Step [94]

Description: Confirm if necessary on Lockbox Worklist if Lockbox is lifted

Work Step [25]

Description: Access the "Lockbox Worklist" in Access Management Office/ PM Office

Work Step [26]

Description: Right click on the Locked encounter and select "Lockbox Create/Release"

Work Step [27]

Description: Lockbox Create/Release message populates "Are you discontinuing the lockbox designation?" Select Yes

Work Step [28]

Description: Lockbox Create/Release conversation opens. Remove Lockbox Comments if needed. Select OK

Start/Stop [29]

Description: Encounter lockbox is lifted

Swim Lane:

Role(s): Clinic Staff

Physician [Custom]

Prescriber/ Interprofessional Team [Custom]

Department(s): Health Information Management

Security Position(s):

Work Step [63]

Description: Accesses patient's lockbox encounter from patient search or worklist

System [65]

Description: Discern Alert with warning of 'lockbox restriction' displays

Decision [66]

Description: Does clinical staff need to access charts to provide care?

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Work Step [64]

Description: Contact the respective Organizations Privacy Office to request access.

Work Step [62]

Description: Close alert and patient chart

Swim Lane:

Role(s): ROI Specialist [Custom]

HIM - Health Records Technician [Custom]

Department(s):

Security Position(s):

Work Step [72]

Description: Receives request for release of records

Work Step [73]

Description: Launches Request Management to begin logging the request

Work Step [74]

Description: Pulls up patient via patient/encounter search

Decision [78]

Description: Does this patient have a Lockbox?

Start/Stop [77]

Description: Proceed with the ROI Request

Start/Stop [76]

Description: Exit the patient search and close out of the request

Work Step [75]

Description: Contact your organization's Privacy Office to request access.

Facilities:

Facility Name: Niagara Health System (All five acute hospitals) and Hotel Dieu Shaver

Status: Approved

Facility Cerner Owner:

Facility Client Owner: Begin, Debbie;Voth, Kim;Malik, Mayank

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Authorize Date: Nov 06, 2024
Facility Comments: