**MEDICAL RECORDS PROCESSING**

These are the steps for the Medical Record Person for each of the nodes in the workflow.

**PHONES: Any time the phone rings, and the person is looking for a specific exam.**

**Step 1:** Go to the Patient list

**Step 2:** Find the Patient. Use either the Name, Account, DOB, Phone or ApptNo fields.



**Step 3:** If the patient is requesting a CD:

1. Click Request Burn CD
2. Select either 'To Be Picked Up', 'To be Mailed', 'Email' as the appropriate response of how the patient will get their CD.

**Step 4:** Fill out the Medical Records Release form.

1. Fill out the exam and any check boxes that are applicable.
2. Save the document.

**Step 5:** Print the patients report.

1. Go into the Repository.
2. Find the Report for the exam in question.
3. Print the report or Fax the report.

**Step 6:** If you have any documents that need to be scanned in, go to the Scanned documents branch.

1. Put the piece of paper in the scanner.
2. Select the name of the document
3. Paper will scan in and automatically save to the Repository under the appointment you are in.

**ORDERS: Tasks that need to be completed daily.**

**TBD**

**Step 1:** Look for the 'To Add Doctor' document in the Repository.

**Step 2:** Add the new Referring Physician to MI. Documentation on how to do so in another form.

**Step 3:** Change the Referral Source on the appointment to the new Referral by using the Edit

Appointment Info screen.

**Step 4:** Mark the task Done.

**HOLD**

**Step 1:** Find the HOLD orders that have a workstep of 'On Hold by Rad'.

**Step 2:** Look in the 'On Hold Radiologist Notes' branch to determine the issue.

**Step 3:** Correct the issue.

**Step 4:** Send back to the Radiologist, by clicking the 'Complete Exam' branch. Make sure the workstep

on the clipboard changed from 'On Hold' to `(Routine, Stat, ASAP) Ready to Read'.

**Step 5:** Mark the task Done.

**MEDICAL CD**

**Step 1:** Go into the patient's chart and go into the Repository. Find the Medical Record Release form.

**Step 2:** Print out the form. Burn the CD based on what it says.

**Step 3:** Determine how patient is going to receive their CD.

1. Patient will pick CD up.

 I. Put CD and paperwork in bin.

1. Patient wants the CD mailed.

 I . Print the reports and print a label.

 II. Mail CD and paperwork to the patient.

1. Patient wants the CD emailed.

 I. Email all paperwork and images through email process.

**Step 4:** Mark the task Done.

**OUTSIDE PRIORS: Worked to obtain outside priors for appointments.**

**Step 1**: Work the PRIORS list in the Orders View.



**Step 2:** Go into the patient's chart. Look on the clipboard to determine where the priors are located.

**Step 3:** Fill out the Medical Records Request form, and fax it to the appropriate location.

**Step 4:** Save the form, or scan the form into the repository if it was printed out.

**Step 5:** Put notes in the Medical Record Notes branch that the priors have been requested.

**Step 6:** When the prior images have arrived, import the images into PACS. Make a note in the patient's chart using the 'MEDICAL RECORDS NOTES' branch that the images are now here.

**Step 7:** Mark the task Done.

Worksteps:

Pre-Appointment- gets created when the schedulers say the patient has relevant Outside Priors.

Post-Appointment- gets created when the technologists complete the exam and say the exam is missing priors.

Rad Request- gets created when the radiologist notates that priors are missing.

**LIENS: Whenever a Lien patient is being seen.
Step 1:** Go into the Appointment Request View.
**Step 2:** Add Request



1. Fill in the patient's name.
2. Fill in the referring physician.
3. The Workstep should be 'Pending Lien'.
4. Fill in the type of appointment.
5. Change the Coverage Type to **'L-** Lien'.
6. Scan in the document to the request.
7. Put in any notes in the Request Notes field.
8. Attorney Information
9. When the Lien was sent to the Attorney.
10. When the signed Lien was received, etc.

**Step 3:** Once all information is present for the Lien, move the workstep to 'Docked'. This means the patient will get a tail to schedule the exam.

**CLINICAL TRIALS: Any time a clinical trial patient needs to be scheduled.**

**Step 1:** Go to the Books View.

**Step 2:** Select the Facility that the patient will be seen.

**Step 3:** Pick the modality for the exam.



**Step 4:** Select the date. Double click, or right click-Set Appointment, on the time slot that the patient can come in. Make sure that the cursor is under the correct Book.

**Step 5:** Select the correct exam description.

**Step 6:** Search for the patient (clinical trial) that you are scheduling. Enter in all the needed information.

More details on scheduling is in the 'Scheduling in Ml' documentation.

**TELERADIOLOGY: Any time an outside read patient needs to be scheduled.**

**Step 1:** Go to the Books View.

**Step 2:** Select the facility 'OUT', and select the Book that correspond to the Teleradiology company.



**Step 3:** Make sure the date is the day the exam was originally completed. Double click, or right click-Set Appointment, on the time slot that the patient can come in. Make sure that the cursor is under the correct Book.

**Step 4:** Select the correct exam description.

**Step 5:** Search for the patient that you are scheduling.

**Step 6:** When the Confirm Appointment screen appears, change the Coverage Type dropdown to `G —Group'.

**Step 7:** Enter the Referring Physician's name. Press OK



**Step 8:** Go into the Demographics branch.

1. Enter the Group into the insurance section. (i.e. if the group is Indian Health Council- add
Indian Health Council as the insurance coverage).
2. Enter '111' as the policy number.



**Step 9:** Go into the Tech Notes branch. Enter in any indications and views from the paperwork.

**Step 10:** Attach the images in PACS to the Medlnformatix **appointment number.**

**Step 11:** Import the order into the appointment.