Work Queue Monitor (WQM) Manual for Clinical and Clerical Staff

Summary: Work Queue Monitor (WQM) is an external document management solution that allows staff to route documents to specific queues, associate the documents with patients, and transmit the documents to the correct location within PowerChart.

Support: Ambulatory Informatics at 231-392-0229 and Help Desk at 231-935-6053.

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Overview

To access Work Queue Monitor, **double-click** on the icon within the Citrix StoreFront.

Function	
a. Application Toolbar	e. Filtering and Searching
b. Practice Queue Tab	f. Preview Pane
c. Work Queue Items	g. View Window Pane
d. Number of Work Queue Items	h. Document Tools

Icon Legend

Main Page

Icon	Function
	Refresh
	Open
	Route

Icon	Function
	Fax
	Combine
	Delete

With a Document Selected or Open

Icon	Function
	Select Patient
	Append/Insert
	Paste

Icon	Function
	Next
	Delete
	Fax

Icon	Function
	Settings

Work Item Properties

Icon	Function
	Zoom In/Out
	View
	Rotate Left/Right

Icon	Function
	Previous/Next Signature
	Settings
	Document Properties

Icon	Function
	Full Screen View
	Cut Current Page
	Copy Current Page
	Delete Current Page

Icon	Function
	Show/Hide Annotations
	Help

View Window Pane

Icon	Function
	Cut Pages
	Copy Pages
	Select All

Icon	Function
	Delete Pages
	Move Pages Up/Down
	Rotate Pages Left/Right

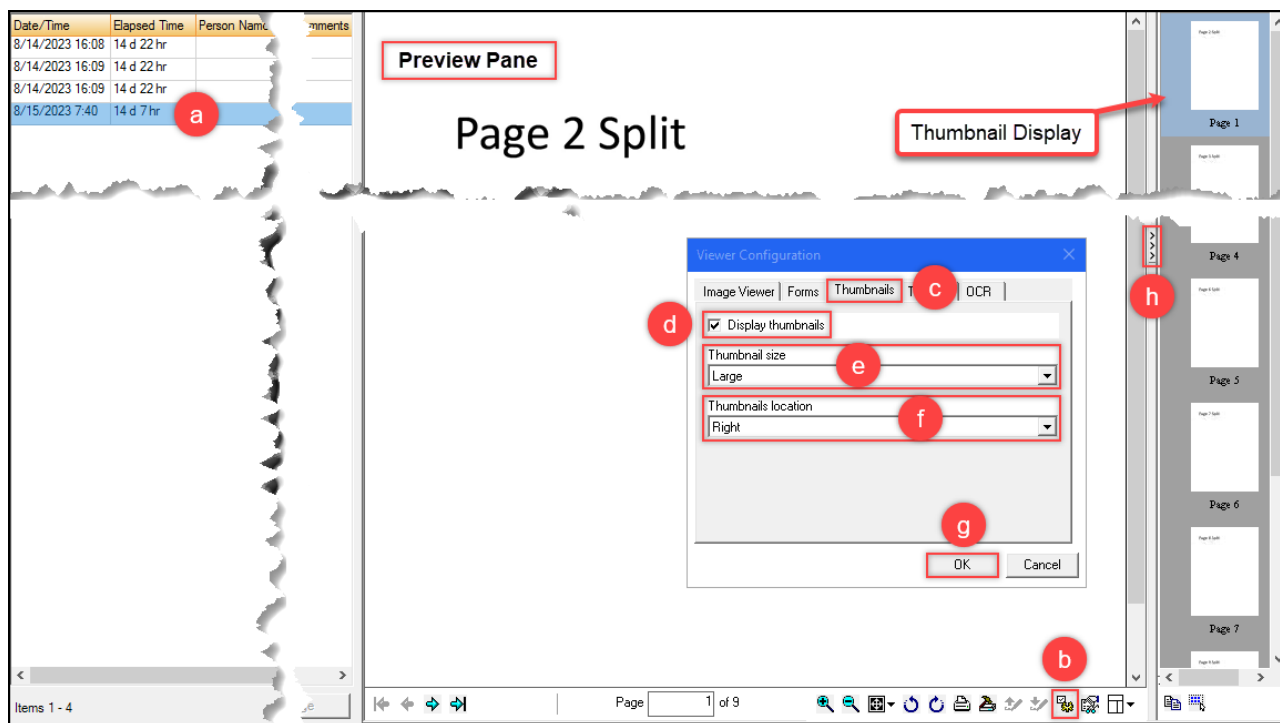| Icon	Function
	Split

Opening and Previewing Items

a. Open WQM.
b. Select a practice tab.
c. **Double-click** on the item to open.
   i. **Single-click** on the item to preview in the Preview Pane.

Thumbnail Display Settings

a. **Single-click** on the item to open it within the Preview Pane.
b. On the bottom of the Preview Pane, click the **Settings icon**.
c. In Viewer Configuration, click the **Thumbnails** tab.
d. Check the **Display thumbnails** box.
e. Use the Thumbnail size drop-down menu to select Medium, Large, or Extra Large thumbnails.
f. Use the Thumbnails location drop-down menu to select the location of the thumbnail display – Top, Bottom, Left, or Right of the Preview Pane.
g. Click **OK**.
h. The three arrows can be used to expand and collapse the Thumbnail Display as needed.

Document Review Process

Rerouting

If a fax has been routed to the wrong clinic's work queue, it can be rerouted to the correct clinic's work queue **only if** that clinic utilizes WQM (see below for list of clinics and routing names).

a. **Double-click** on the item to open.
b. Click on the **Location search** icon.
c. Select the correct **Location** from the list.
d. Click **OK** to update the Location.
e. Select **OK** again to send.
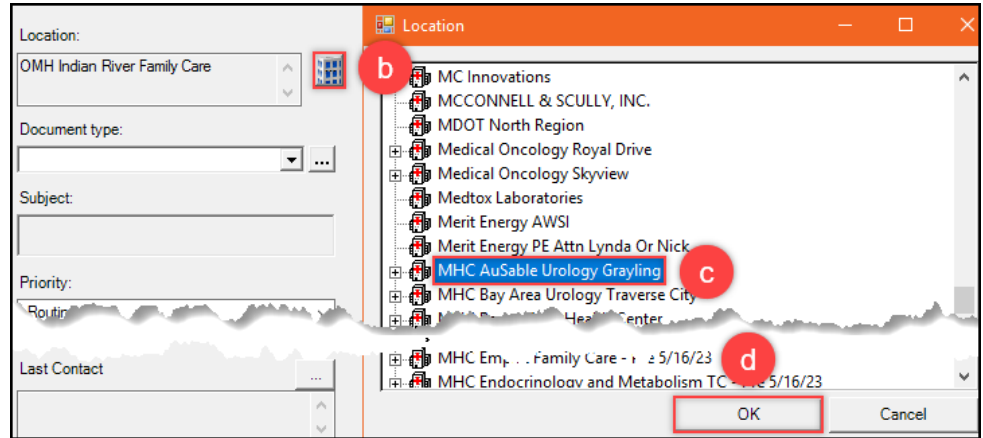
Location Rerouting Names

Clinic Name	Location Name for Rerouting
Cardiothoracic Surgeons of Grand Traverse	Cardiothoracic Surgeons of Grand Traverse
Crawford School Provider Services	MHC Grayling Community Health Center Primary Care
Kalkaska Medical Associates Non RHC	Kalkaska Medical Associates Non RHC
Kalkaska Medical Associates RHC	Kalkaska Medical Associates RHC
Kalkaska Medical Associates Mancelona Non RHC	Kalkaska Medical Associates Mancelona Non RHC
Kalkaska Medical Associates Mancelona RHC	Kalkaska Medical Associates Mancelona Non RHC
KMHC Teen Health Corner Forest Area	KMHC Teen Health Corner Forest Area
KMHC Teen Health Corner Kalkaska	KMHC Teen Health Corner Kalkaska
KMHC Teen Health Corner Kalkaska Middle School	KMHC Teen Health Corner Kalkaska
MHC AuSable Urology Grayling	MHC AuSable Urology Grayling
MHC Bay Area Urology Traverse City	MHC Bay Area Urology Traverse City
MHC Cadillac General Surgery	MHC Cadillac General Surgery
MHC Cadillac OBGYN	MHC Cadillac OBGYN
MHC Cadillac Orthopedics	MHC Cadillac Orthopaedics
MHC Cadillac Primary Care	MHC Cadillac Primary Care
MHC Cadillac Urology Cadillac	MHC Cadillac Urology Cadillac
MHC Cadillac Urology Frankfort	MHC Cadillac Urology Cadillac
MHC Cedarwoods Internal and Geriatric Medicine	MHC Cedarwoods Internal and Geriatric Medicine
MHC Elmwood Primary Care	MHC Elmwood Primary Care
MHC Empire Family Care	MHC Empire Family Care
MHC Endocrinology and Metabolism Traverse City	MHC Endocrinology and Metabolism Traverse City
MHC Frankfort Medical Group	MHC Frankfort Medical Group
MHC Grayling Community Health Center Behavioral Health	MHC Grayling Community Health Center Primary Care

MHC Grayling Community Health Center Elder Care	MHC Grayling Community Health Center Elder Care
MHC Grayling Community Health Center OB/GYN	MHC Grayling Community Health Center Primary Care
MHC Grayling Community Health Center Pediatrics	MHC Grayling Community Health Center Primary Care
MHC Grayling Community Health Center Primary Care	MHC Grayling Community Health Center Primary Care
MHC Grayling Community Health Center Walk In Clinic	MHC Grayling Community Health Center Primary Care
MHC Grayling Surgical Services General Surgery	MHC Grayling Surgical Services General Surgery
MHC Grayling Surgical Services Orthopedic Surgery	MHC Grayling Surgical Services General Surgery
MHC Infectious Disease Consultants Traverse City	MHC Infectious Disease Consultants Traverse City
MHC Kidney and Hypertension Specialists Traverse City	MHC Kidney and Hypertension Specialists Traverse City
MHC Little Traverse Primary Care	MHC Little Traverse Primary Care
MHC Maternal Fetal Medicine Traverse City	MHC Maternal Fetal Medicine Traverse City
MHC McBain Primary Care	MHC McBain Primary Care
MHC Milltown Primary Care Clinic Grayling	MHC Milltown Primary Care Clinic Grayling
MHC Mio OBGYN	MHC Mio Primary Care
MHC Mio Primary Care	MHC Mio Primary Care
MHC Munson Family Practice Center Traverse City	MHC Munson Family Practice Center Traverse City
MHC Neurology Traverse City	MHC Neurology Traverse City
MHC Neurosurgery Traverse City	MHC Neurosurgery Traverse City
MHC OMH Family Practice Gaylord	MHC OMH Family Practice Gaylord
MHC OMH General Surgery Gaylord	MHC OMH General Surgery Gaylord
MHC OMH Indian River Family Care	MHC OMH Indian River Family Care
MHC OMH Indian River OBGYN	MHC OMH Indian River Family Care
MHC OMH Indian River Pediatrics	MHC OMH Indian River Family Care
MHC OMH Indian River Walk In Clinic	MHC OMH Indian River Family Care
MHC OMH Internal Medicine Gaylord	MHC OMH Internal Medicine Gaylord
MHC OMH Lewiston Behavioral Health	MHC Grayling Community Health Center Primary Care
MHC OMH Lewiston Primary Care	MHC OMH Lewiston Primary Care
MHC OMH OBGYN Gaylord	MHC OMH OBGYN Gaylord
MHC OMH Orthopedic Surgery Gaylord	MHC OMH Orthopedic Surgery Gaylord
MHC OMH Pediatrics Gaylord	MHC OMH Pediatrics Gaylord
MHC OMH Urology Gaylord	MHC OMH Urology Gaylord
MHC OMH Walk In Clinic Gaylord	MHC OMH Walk In Clinic Gaylord
MHC Orthopedic Institute	MHC Orthopedic Institute
MHC Orthopedic Institute Harbor Springs	MHC Orthopedic Institute
MHC Palliative Care Traverse City	MHC Palliative Care Traverse City
MHC Pediatric Craniofacial Clinic Traverse City	MHC Pediatric Developmental Assessment Clinic Traverse City

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MHC Pediatric Developmental Assessment Clinic Traverse City	MHC Pediatric Developmental Assessment Clinic Traverse City
MHC Pediatric Immunization Clinic Traverse City	MHC Pediatric Developmental Assessment Clinic Traverse City
MHC Pediatric Synagis Clinic Traverse City	MHC Pediatric Developmental Assessment Clinic Traverse City
MHC PreOperative Assessment Clinic Traverse City	MHC PreOperative Assessment Clinic Traverse City
MHC Prudenville Community Health Center OBGYN	MHC Prudenville Community Health Center OBGYN
MHC Prudenville Community Health Center Orthopedic	MHC Prudenville Community Health Center Orthopaedics
MHC Prudenville Community Health Center Primary Care	MHC Prudenville Community Health Center Primary Care
MHC Prudenville Community Health Center Walk In Clinic	MHC Prudenville Community Health Center Primary Care
MHC Pulmonary and Critical Care Traverse City	MHC Pulmonary and Critical Care Traverse City
MHC Rheumatology Traverse City	MHC Rheumatology Traverse City
MHC Roscommon Community Health Center	MHC Roscommon Community Health Center
MHC Sleep Disorders Clinic Cadillac	MHC Sleep Disorders Clinic Cadillac
MHC Sleep Disorders Clinic Traverse City	MHC Sleep Disorders Clinic Traverse City
MHC Spine and Nerve Pain Traverse City	MHC Spine and Nerve Pain Traverse City
MHC Structural Heart Clinic	MHC Traverse Heart and Vascular Structural Heart Clinic
MHC Thomas Judd Care Center PrEVENT Clinic	MHC Thomas Judd Care Center Traverse City
MHC Thomas Judd Care Center Traverse City	MHC Thomas Judd Care Center Traverse City
MHC Traverse General Surgery and Trauma Care	MHC Traverse General Surgery and Trauma Care
MHC Traverse Heart and Vascular Cadillac	MHC Traverse Heart and Vascular Traverse City
MHC Traverse Heart and Vascular Charlevoix	MHC Traverse Heart and Vascular Traverse City
MHC Traverse Heart and Vascular Frankfort	MHC Traverse Heart and Vascular Traverse City
MHC Traverse Heart and Vascular Gaylord	MHC Traverse Heart and Vascular Traverse City
MHC Traverse Heart and Vascular Grayling	MHC Traverse Heart and Vascular Traverse City
MHC Traverse Heart and Vascular Heart Failure Clinic	MHC Traverse Heart and Vascular Heart Failure Clinic
MHC Traverse Heart and Vascular Indian River	MHC Traverse Heart and Vascular Traverse City
MHC Traverse Heart and Vascular Kalkaska	MHC Traverse Heart and Vascular Traverse City
MHC Traverse Heart and Vascular Manistee	MHC Traverse Heart and Vascular Traverse City
MHC Traverse Heart and Vascular Prudenville	MHC Traverse Heart and Vascular Traverse City
MHC Traverse Heart and Vascular Traverse City	MHC Traverse Heart and Vascular Traverse City
**THV- Referrals	Select the plus sign next to MHC Traverse Heart and Vascular Traverse City to expand, then select the option below. MHC Traverse Heart and Vascular Traverse City MHC Traverse Heart and Vascular Traverse City

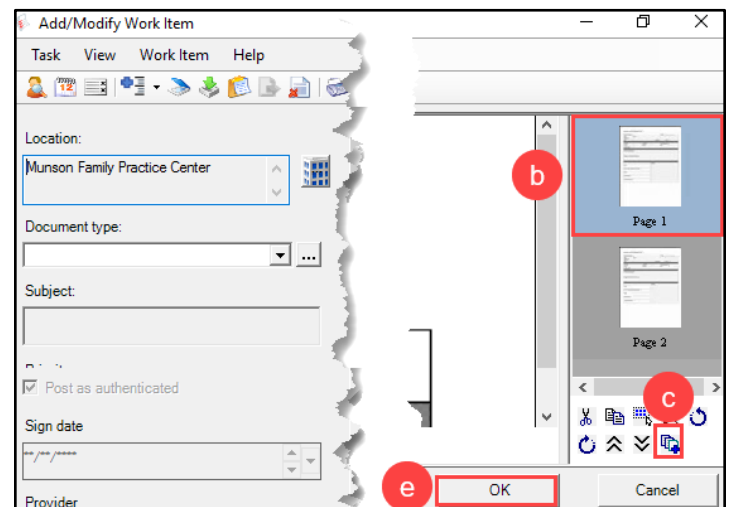|	
MHC Virtual Urgent Care	MHC Virtual Urgent Care

Faxing

a. Highlight the item from the queue.
b. Select the **fax** icon.
c. Select **!FaxWQM**.
    i. Enter the fax number. (Note: Use the full 10-digit number including area code.)
    ii. Select **OK**.
d. Check the **Include cover page** box.
(This will default after the first time selected).
e. Select a comment from the Comments drop-down menu.
    i. Click **Add**.
    ii. Enter any additional information as needed.
f. Select **Fax**.
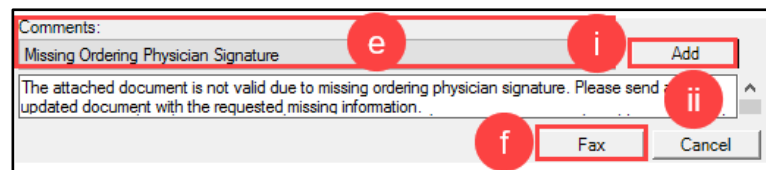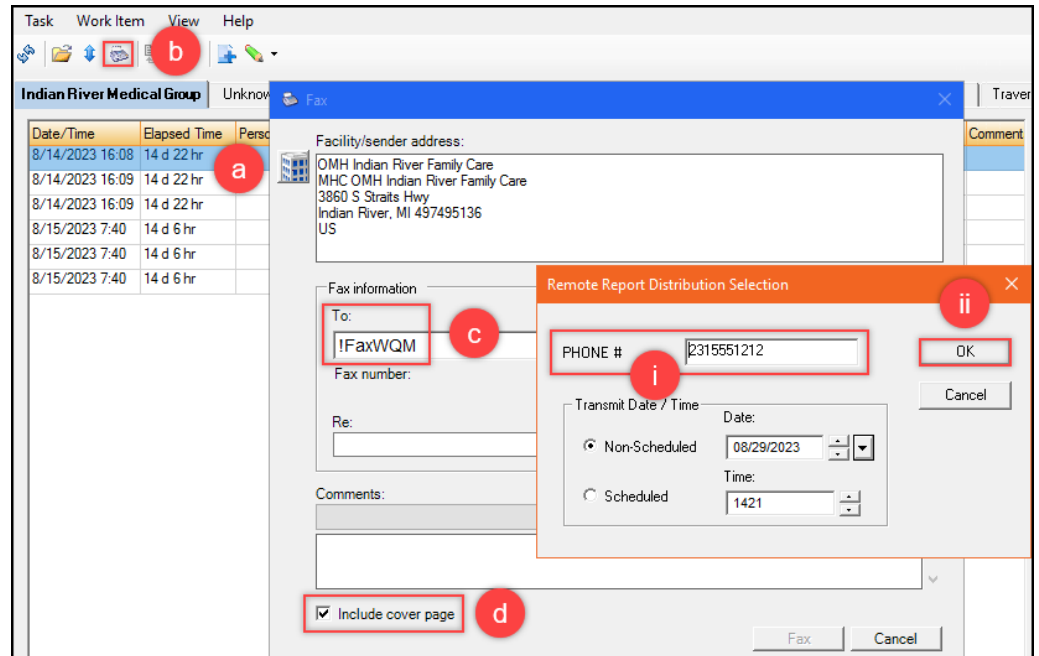
Splitting

Splitting documents may be needed if multiple patient items are sent within the same fax.

a. **Double-click** on the item to open.
b. Select the page(s) to be split within the thumbnail display (see settings above to add the thumbnail display).
    i. Selected item(s) will be highlighted in blue.
    ii. Hold down the Ctrl key on the keyboard to select multiple pages.
c. Click the **Split icon**.

      i.   The previously selected page(s) will split into a new work item. Review the page(s) as necessary.

   d.   Select **Next** to choose additional sets of pages until all pages have been reviewed and split.

   e.   Select **OK**.

> **Note:** Each split document will become its own work item in the queue to be completed.

Combining

   a.   Select items to combine by holding down the Ctrl key on the keyboard and clicking each item to highlight.

   b.   Click the **Combine icon**.

   c.   To re-sequence, highlight an item by clicking on it.

      i.   Move the item **Up** or **Down**.

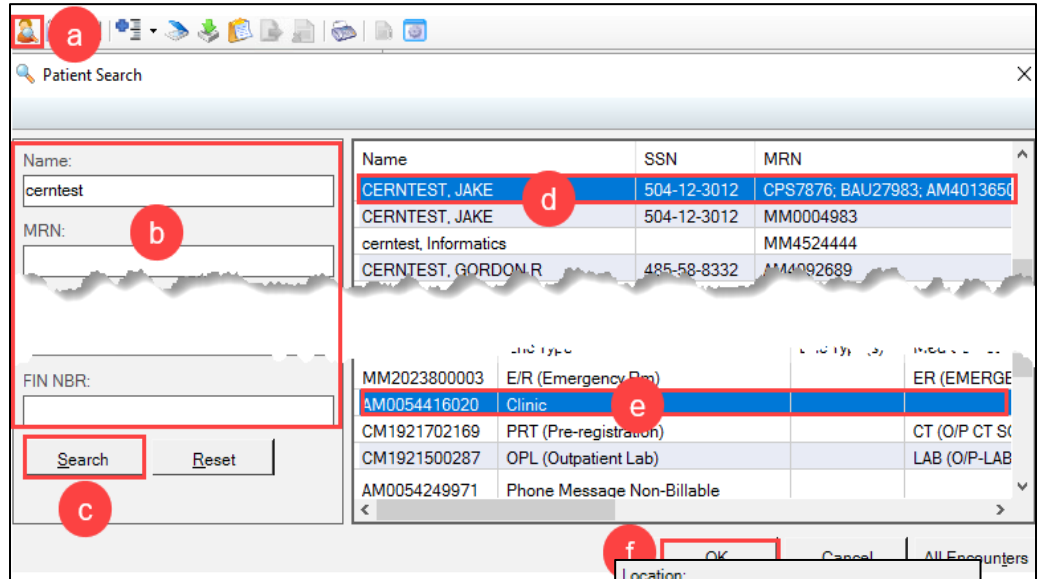   d.   Click **Merge**.

Work Item Completion Process

Assigning a Patient

a. Click the **Select Patient** icon.
b. Enter patient identifier(s).
c. Click **Search**.
d. Select the correct patient.
e. Select the correct encounter. If none, create an InBetween Visit within Revenue Cycle.
f. Click **OK**.

Adding a Document type and a Category

a. Select a **Document type** from the drop-down menu.
    i. See the Scanning-Document Mapping grid on the Clinical EHR Education website for a list of document names, types, and descriptions.
b. Select a **Category** (if necessary) from the drop-down menu.
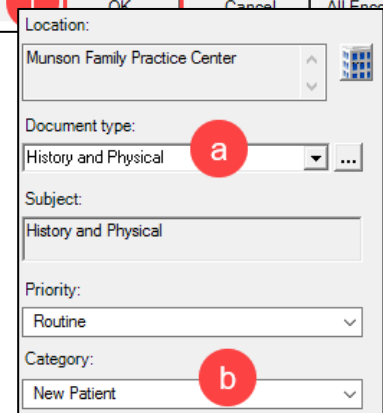
Priority, Category, and Status

- **Priority:** Contains Routine, STAT, and Urgent options (use is determined as necessary by practice).
- **Category:** Contains HIM, Lab, New Patient, Referral, and Walk-in options (use is determined as necessary by practice).
- **Status:** This drop-down is a required field and can be auto generated by WQM.
    o **New:** All new work items entering WQM are displayed in a New status.
    o **In Process:** Status is auto generated when a work item is opened in WQM.
    o **Available:** The system automatically changes a status from New to Available when the work item has been opened.
    o **Clarify:** Status can be selected in the drop-down menu and requires a status reason.
    o **Faxed:** The system generates this status when a work item is faxed outbound.
    o **Complete:** Once this status is selected and the user clicks OK, the work item is sent to the patient's chart. The work item is no longer viewable and cannot be modified in WQM.
    o **Canceled:** Status can be selected in the drop-down menu and requires a status reason.
- **Reason:** Becomes a required field when specific statuses are selected as noted above.
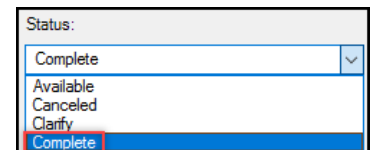
> **Mark the Status as Complete to open additional fields and to send the document(s) into the patient's chart.**

Adding Notes or Comments
   a. Select the **ellipsis (…)** next to Last Contact.
   b. Click **Add**.
   c. Fill in: Date, Predefined comments, or free text comments.
   d. Click **OK**.
   e. Click **Close**.
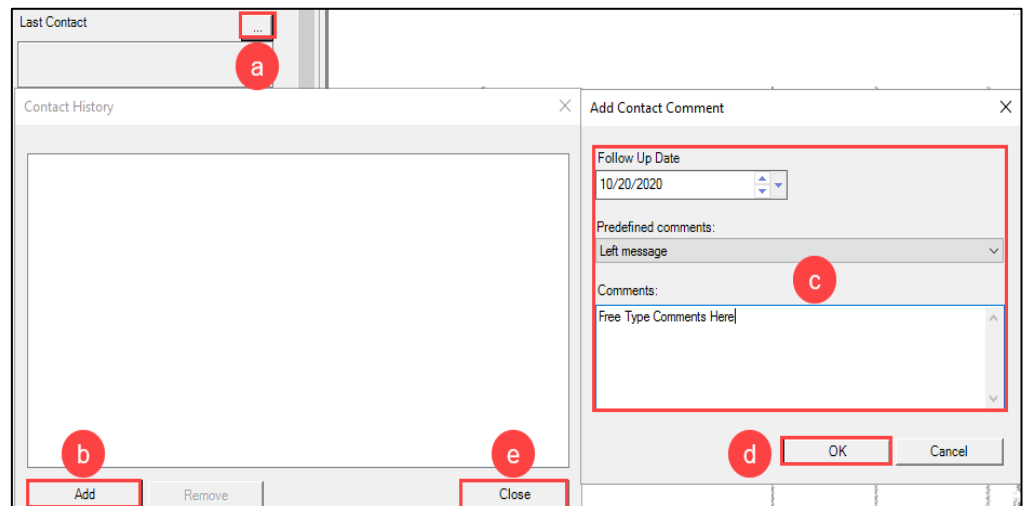
Date of Service

The Date of service field **must be changed** to the date the patient received the service. This field defaults to the selected encounter's creation date, which may not be the correct date to be listed within the chart.
   a. Highlight the date within the Date of service field.
   b. Press the backspace or delete key on the keyboard.
   c. Enter the correct Date of service.
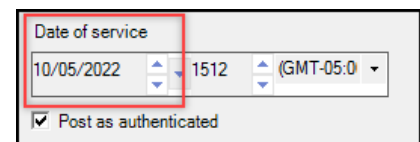
Follow one of the workflows below to complete the process.

Electronic Signature Workflow

Step 1: Office Staff Workflow – Within WQM

a. **UNCHECK** the **Post as authenticated** box.
Note: Unchecking this box will not mark the document as authorized until it has been reviewed and signed.

b. Add the signing provider:
   i. In the Provider box, click the **magnifying glass** to search.
   ii. Enter the provider's name and click **Search**.
   iii. Select the appropriate provider.
   iv. Click **OK**.
   v. Select the **Requested Sign** radio button.
   vi. Click **Add**.
   a. The Provider, Status, and Action will display.
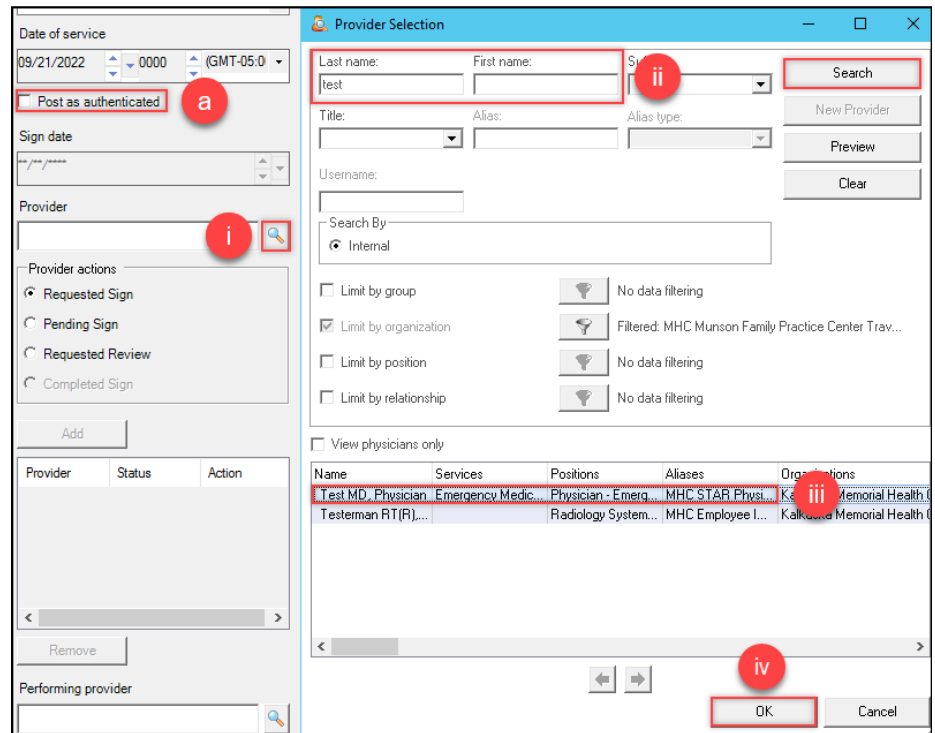
c. Add the provider's clinical staff or other appropriate staff member:
   i. Follow the same steps as those listed in **Step b** above to add the appropriate staff member.
   ii. Select the **Requested Review** radio button.
   iii. Click **Add**.
      a. The names of the provider and the clinical staff member will display in the Provider column, as well as their Status and Action.
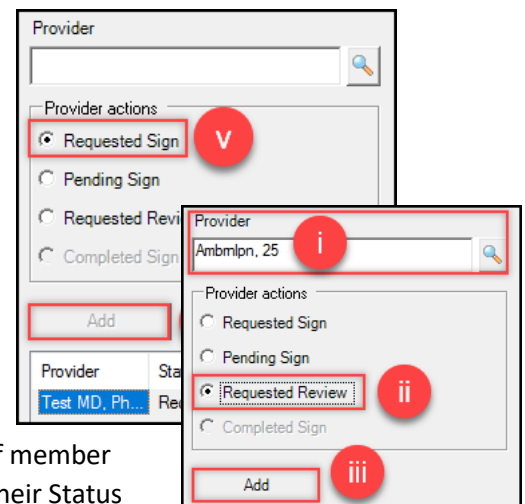
d. Add the name of the staff member completing the work queue item:
   i. In the Performing provider box, click the **magnifying glass** to search.

MUNSON HEALTHCARE
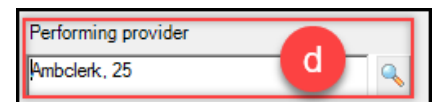
   ii.   Select the appropriate staff member.

e.   Within the document, +ABC will appear as the cursor.
   **Note:** The provider must be selected in the status/action box for the +ABC to appear.
f.   Scroll to where the signature needs to be placed within the document and click to add the signature box.
g.   The **Requested Sign For: Provider Name** will appear where the signature will be placed.
     i.   **Note:** The signature box can be moved by clicking and dragging to the appropriate location.

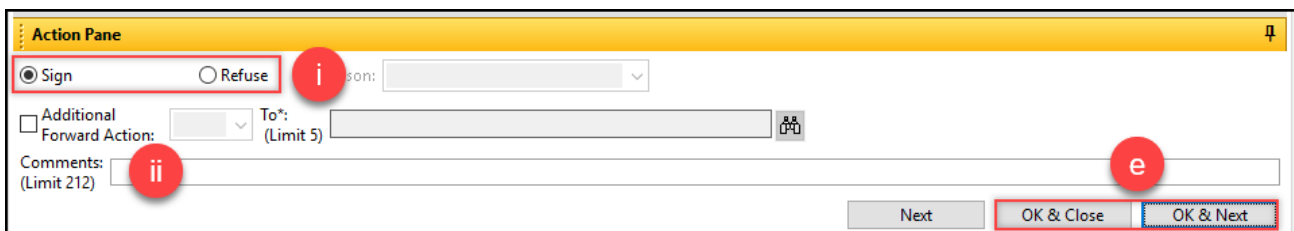**Requested Sign For: Test MD, Physician**

h.   Click **OK**.

Step 2: Provider Workflow – Within PowerChart
a.   Navigate to Message Center.
b.   Open the Documents folder, if necessary, then click on the **Sign** folder.
c.   Double-click on the item to open.
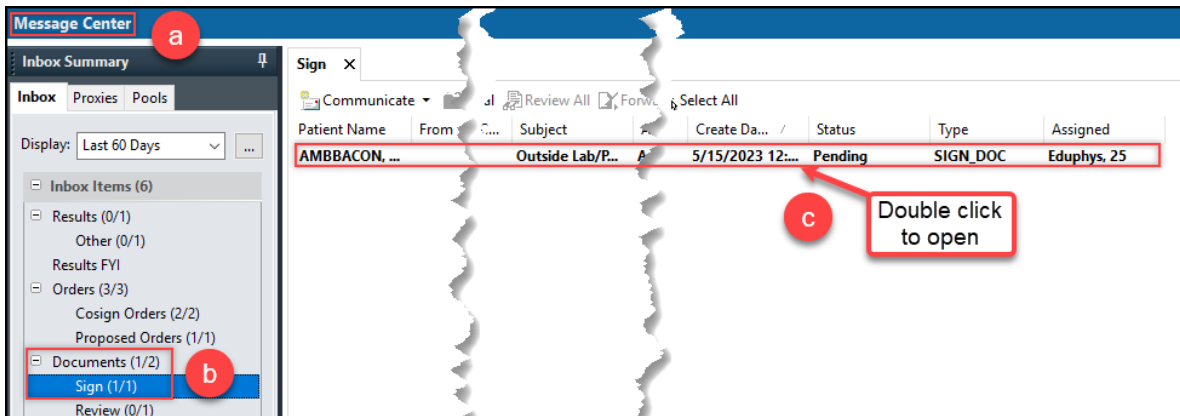
d.   Complete the following in the Action Pane:
     i.   Select the **Sign** or **Refuse** radio button.
          a.   If **Refuse** is selected, please also select a Reason from the drop-down menu.
     ii. Uncheck the **Additional Forward Action** button.
          Note: Providers may keep the **Additional Forward Action** button selected and choose a recipient
          to send the message to if desired.
e.   Click **OK & Close** or **OK & Next** to complete.
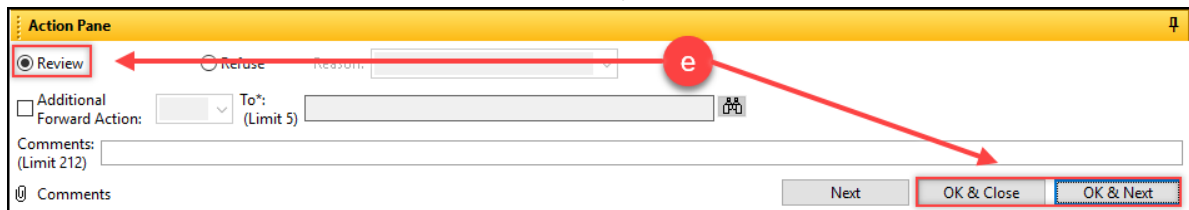
Step 3: Clinical Staff Workflow – Within PowerChart

a. Navigate to Message Center.
b. Open the Documents folder, if necessary, then click on the Sign folder.
c. Double-click on the item to open.
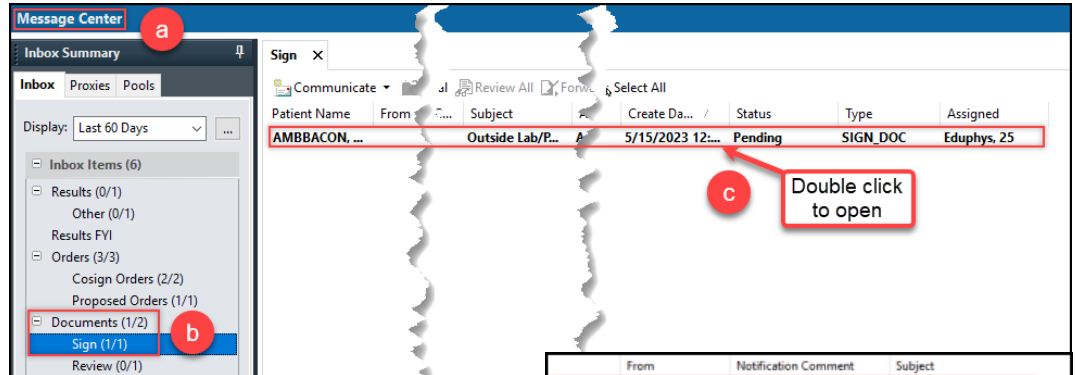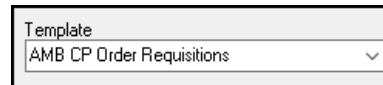

d. Verify that the electronic signature information is present on the document.

e. Select the **Review** radio button in the Action Pane, then **OK & Close or OK & Next**.


f. Fax the signed document to the requesting facility via Medical Record Request using the existing process.

    i. Template: **AMB CP Order Requisitions**

Sending the Document into the Chart Without Review

a. Check the **Post as Authenticated** box.

b. Adjust the **Sign Date**, if needed.

c. Select the **Completed Sign** radio button.

d. Enter the user's name in the **Performing provider** field.

    i. The person entering the information and sending the document into the patient's chart is considered the Performing provider. This will mark the document with the user's legal signature and a time/date stamp.

    ii. Use the magnifying glass to search for a user.

e. Click **OK** to send the document into the patient's chart.
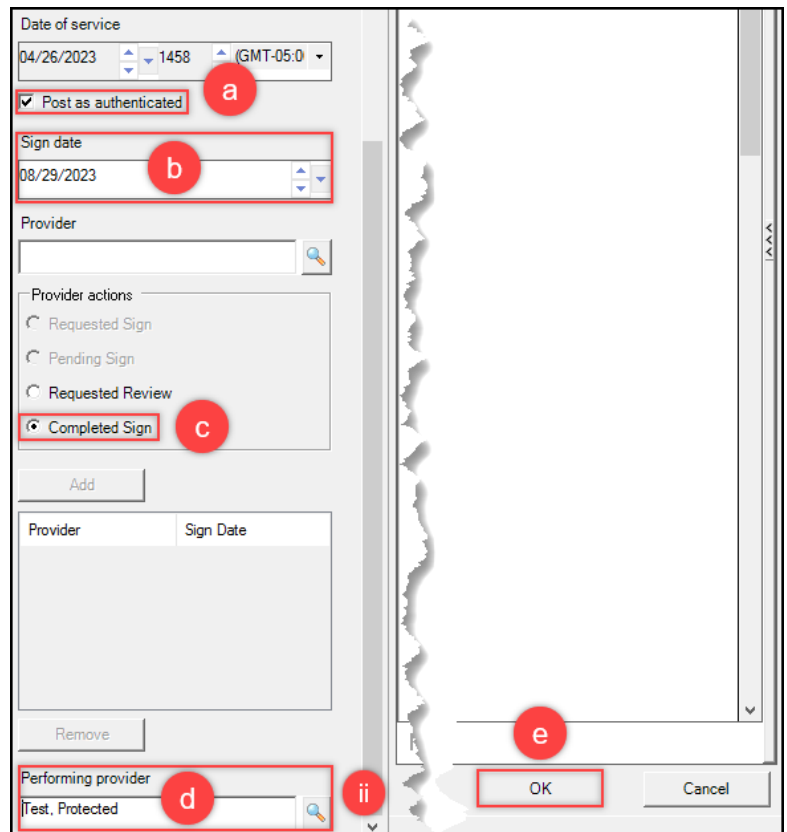
Sending the Document into the Chart for Provider/Staff Member Review

a. Check the **Post as Authenticated** box.

b. Adjust the **Sign Date**, if needed.

c. Enter the reviewer's name (provider or staff member may be used) in the Provider field.

    i. Use the magnifying glass to search for a user.

d. Select the **Requested Review** radio button.

e. Click **Add**.

f. The designated user will be listed. Complete steps d and e as many times as needed.

g. Enter the user's name in the **Performing Provider** field.

h. Click **OK**. This will send the document into the patient's chart and into the reviewer's message center inbox.