Document Review Workflow

	The Document Review Workflow will consist of: • Rerouting the document(s) to another queue (if needed) • Faxing the document(s) to another location (if needed) • Combining documents • Splitting a document
1	**Rerouting:** a. Open the document b. Select the Location icon c. Select the appropriate location from the list i. See Location Rerouting Names within the Work Queue Monitor Manual on the Clinical EHR Education website for appropriate routing locations. d. Add comments (if needed) e. Click OK
2	**Faxing:** a. Highlight the document in the appropriate queue b. Click the Fax icon on the applications toolbar c. Select !FaxWQM d. Enter the full 10-digit fax number, including area code e. Click OK f. Check the **Include cover page** box g. Select an appropriate comment from the dropdown menu h. Click Add i. Enter additional information in the comment box (if needed) j. Click Fax
3	**Combining Documents:** a. Hold down the Ctrl key on the keyboard b. Click on the documents to be combined within the work queue c. Click the Combine icon on the applications toolbar d. Re-sequence the document order if needed e. Click Merge

4	**Splitting a Document:**
	a. Open the document
	b. Select pages to split within the thumbnail display – hold Ctrl key on keyboard to select multiple pages
	c. Click the Split icon on the preview pane toolbar
	d. Select Next until all pages have been reviewed and/or split
	e. Select appropriate answers to the pop-up box questions if needed
	    i. Maintain patient context?
	    ii. Maintain document type and subject?
	f. Click OK

	Clinical EHR Education Website Reference: Work Queue Monitor Manual; Scanning-Document Mapping

Work Item Completion Process

	The Work Item Completion Process will consist of: • Reviewing the document • Assigning a patient and encounter • Adding a document type • Completing the Work Queue item • Changing the Date of service field • Sending the document to the patient's chart without provider/staff member review • Sending the document for provider/staff member review (if needed) • Sending the document to the provider for an electronic signature
1	**Assigning a Patient:** a. Open the document b. Click the Select Patient icon c. Enter patient identifiers d. Click Search e. Select the patient and an appropriate encounter ii. An InBetween Encounter can be created in Revenue Cycle if one is not available. In the Encounters perspective, under the Encounters tab, right click, and then click add encounter.
2	**Adding a Document Type and a Category:** a. Select the correct Document type from the dropdown menu i. Please see Scanning-Document Mapping Job Aid on the Clinical EHR Education website for specific information on document names, types, and descriptions. b. Select a Category from the dropdown menu (if needed)
3	**Date of Service:** a. The Date of service field must be changed to the date the patient received the service.
	CHOOSE ONE OF THE FOLLOWING BELOW TO COMPLETE THE PROCESS.
3	**Sending a Document to the patient's chart WITHOUT provider/staff member review**: a. Update Status to Complete b. Edit date and add comments as needed c. Verify the Post as authenticated box is **checked** d. Add your name as the completer to the Performing Provider box e. Click OK
4	**Sending a Document to the patient's chart FOR provider/staff member review:** a. Update Status to Complete b. Edit date and add comments as needed c. Verify Post as authenticated box is **checked** d. Click the magnifying glass to search e. Search for and select appropriate reviewing provider/staff member f. Select **Requested Review** radio button g. Click Add h. Repeat the process in steps d-g to add multiple reviewers i. Add your name as the completer to the Performing Provider box j. Click OK
5	**Sending a Document for Provider Electronic Signature**: a. Update Status to Complete b. Edit date and add comments as needed

	c. **Uncheck** the Post as authenticated box d. Click the magnifying glass to search e. Search for and select the appropriate reviewing provider f. Select **Requested Sign** button g. Click Add h. Place +ABC cursor on the document where signature needs to appear i. Click once to add Requested Sign For box j. Click the magnifying glass again to search k. Search for and add the provider's clinical staff or other staff member's name as a requested reviewer l. Select **Requested Review** button m. Click Add n. Add your name as the completer to the Performing Provider box o. Click OK
	The document can now be monitored in the staff member's Message Center under Documents. Once the provider reviews and signs the document, it can be sent back to the originating facility using MRR.
Clinical EHR Education Website Reference: Work Queue Monitor Manual; Electronic Signature Workflow	