

Medical Records Request – Report Request Tool

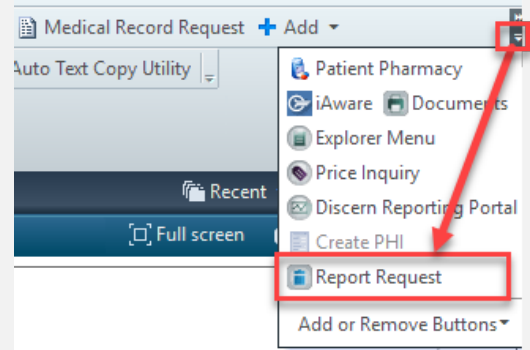
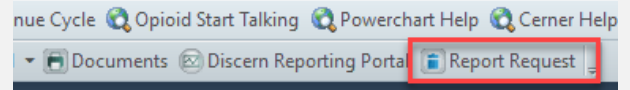
Report Request Overview

The Report Request tool can be used as an easy way to print, fax, or send full or partial medical records for Release of Information (ROI) requests. This tool can also be used to print documents from across multiple encounters for the patient, such as pathology, lab, and radiology reports.

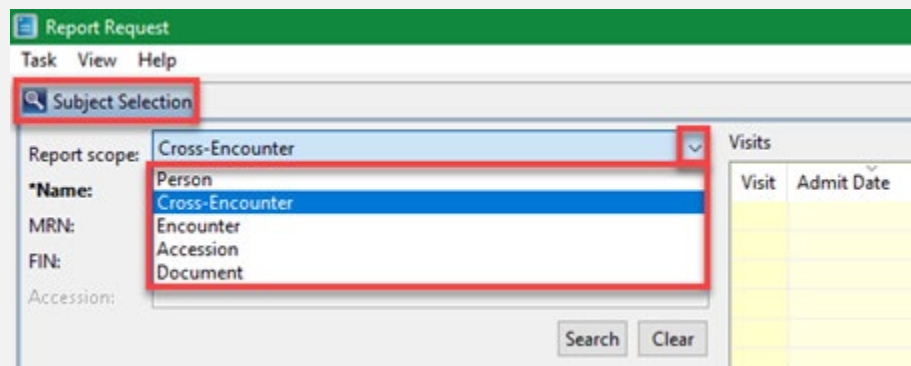
Create a Report Request

To create a Report Request, follow the steps below:

- 1) Click on **Report Request** from the Toolbar within Powerchart.
 - a. If Report Request is not visible on the Toolbar, click the down arrow on the right side of the Toolbar to access it.



- 2) From the **Subject Selection** tab, select the **Report scope dropdown arrow**. Choose one of the following report scopes:
 - a. **Person:** Produces reports that contain result information for **all encounters** associated with a selected patient. This scope facilitates monitoring the condition of patients who are admitted to your institution more than once.
 - b. **Cross-Encounter:** Produces a report that includes selected encounter information from the user. This scope is used by audiences who require specific patient encounters using the medical record number (MRN) or financial number (FIN).
 - c. **Encounter:** Produces reports that include all the result information that has been verified throughout a patient's encounter. This scope is used by audiences who require comprehensive records of a patient's stay.
 - d. **Accession:** Produces a report that contains the results for a single accession number.
 - e. **Document:** Produces a report that contains the selected document or documents.



3) Enter the patient's name, MRN, and/or FIN and click **Search**.

*Name:
 MRN:
 FIN:
 Accession:
 Search Clear

4) From the Patient Search window, choose the appropriate patient and click **Select**.

zztest, a
 MRN:
 SSN:
 Birth Date:
 Sex:
 Fin Nbr:
 Search Clear

Name	MRN	CMRN	Birth Date	Sex	Age	SSN	Deceased
ZZTEST, ANISSA	30001691981; (3000173794)		05/09/1972	Female	48 Years	X00-XX-6547	
ZZTEST, ATE	30001774018		01/01/1990	Male	31 Years	X00-XX-9590	

Select Cancel

5) If Encounter or Cross-encounter was chosen in the **Report Scope** dropdown, select one or more of the encounters from the **Visits** pane to include in the report.

- **Note:** More than one encounter can be selected by holding down the CTRL key on the keyboard.

Report Request
 Task View Help
 Subject Selection
 Report scope: Cross-Encounter
 *Name: ZZTEST, PATIENTFIVE
 MRN: 330001776921
 FIN:
 Accession:
 Search Clear
 Event status: Verified only
 Printable Date Range
 All dates
 From: mm/dd/yyyy hh: mm To: mm/dd/yyyy hh: mm

Visit	Admit Date	Discharge Date	Visit Type	MRN	FIN	Client	Facility
1	2/10/2021	2/10/2021	Outpatient	330001776921	73000001239952	McLaren Oakland Clarkston Lab	OK09 Lab
2	1/18/2021	1/18/2021	Clinic	330001776921	73000001239612	McLaren Oakland Baybrooke Internal Medicine	OK17 IM E
3	1/12/2021	1/12/2021	Clinic	330001776921	73000001239527	McLaren Oakland Convenient Care Oxford	OK81 Cnv
4	1/5/2021	1/5/2021	Clinic	330001776921	73000001239432	McLaren Oakland Convenient Care Oxford	OK81 Cnv
5	1/4/2021	1/4/2021	Clinic	330001776921	73000001239362	McLaren Oakland Convenient Care Oxford	OK81 Cnv
6	12/7/2020		Inpatient	330001776921	73000001195204	McLaren Central Michigan	Central
7	10/22/2020	10/24/2020	Day Surgery	330001776921	73000001238589	McLaren Oakland	Oakland
8	5/12/2020	6/30/2020	Recurring	330001776921	73000001195467	McLaren Greater Lansing Rehabilitation Services	LN01 Reh
9	4/13/2020	4/13/2020	Clinic	330001776921	73000001195202	Holt Family Practice	LN46 Holt
10			Prereg	330001776921	73000001239437	McLaren Oakland Pain Clinic	OK07 Pain

6) From the **Event Status** dropdown, choose one of the following statuses:

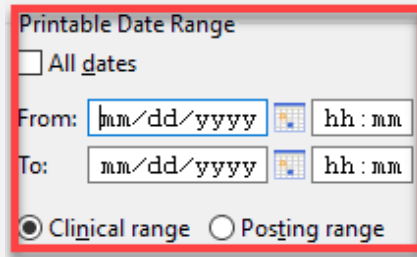
- Verified Only:** Includes all published results that are in an Authenticated, Verified, or Modified status.
- Verified and Pending:** Includes all published results that are in a Verified, Modified, In-Progress, Unauthenticated, Transcribed, or Transcribed-Corrected status.
- All Results:** Includes all published results that are in any defined status, including the In-Error status.

- **Note:** You must have the Allow in Error Results privilege for the system to process this status. If you do not have this privilege and select the **All Results** status, the system is automatically set to the **Verified and Pending** status.

Subject Selection
 Report scope: Person
 *Name: ZZTEST, PATIENTFIVE
 MRN: 330001776921
 FIN:
 Accession:
 Search Clear
 Event status: Verified only
 Printable Date Range
 All dates
 From: mm/dd/yyyy hh: mm To: mm/dd/yyyy hh: mm

7) The **All Dates** checkbox will be defaulted to include all dates for the selected encounters.

f. To choose a specific Date Range from the selected encounters, uncheck the **All Dates** checkbox and enter From and To dates.



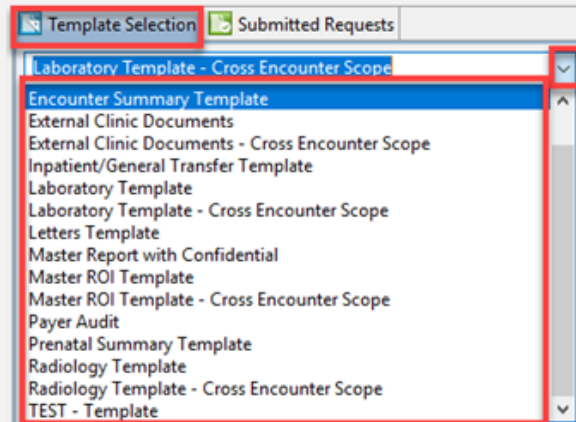
8) Select the appropriate range radio button:

g. **Clinical range:** Results will qualify that are clinically significant for the selected date range.

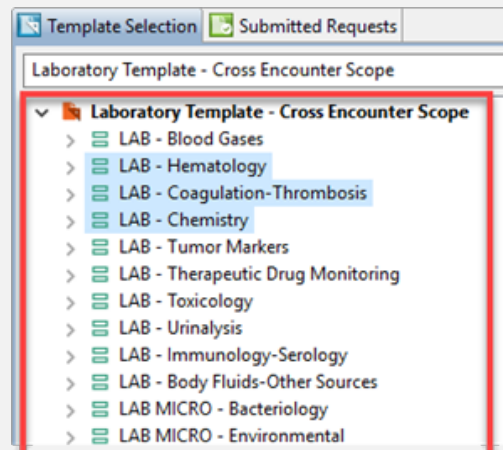
h. **Posting range:** Results will qualify that were posted to the database for the selected date range.

9) From the **Template Selection** tab, choose the appropriate report template to use to for the desired report. Commonly used templates include:

- **Master ROI Template - Cross Encounter Scope:** Used when the Report Scope is set to Encounter, and the entire record is requested for that encounter.
- **Document Template - Cross Encounter Scope:** This is a standard template used for any documentation within the chart.
- **Laboratory Template – Cross Encounter Scope:** Use this template when Lab reports are requested.
- **Radiology Template – Cross Encounter Scope:** Use this template when Radiology reports are requested.

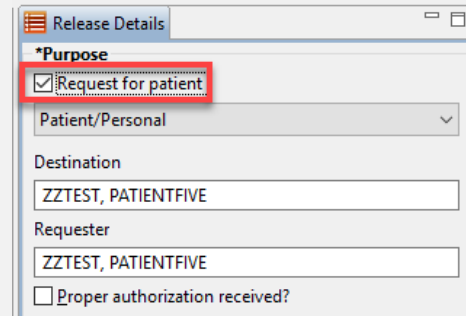


10) After choosing a template, a list of corresponding templates display below. Choose a template from the list or users can select multiple templates by pressing the **CTRL** key on their keyboard.



11) In the **Release Details** tab:

- a. Select the **Request for Patient** checkbox if the report was requested by the patient.

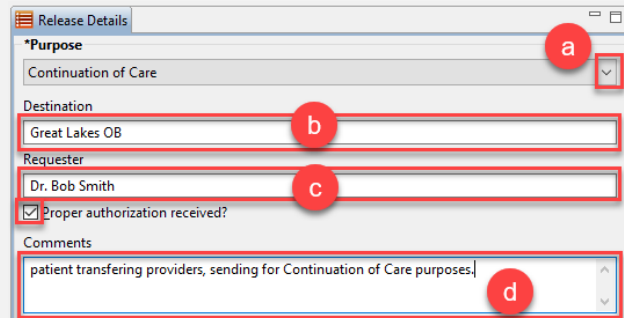


The screenshot shows the 'Release Details' window. Under the '*Purpose' section, the 'Request for patient' checkbox is checked and highlighted with a red box. Below it, the 'Patient/Personal' dropdown is set to 'Patient/Personal'. The 'Destination' field contains 'ZZTEST, PATIENTFIVE' and the 'Requester' field also contains 'ZZTEST, PATIENTFIVE'. The 'Proper authorization received?' checkbox is unchecked.

12) If the report was not requested by the patient, choose the reason from the **Purpose** dropdown.

- i. Enter the **Destination** (person or organization) requesting the report.
- j. Enter the **Requester** (person or organization) requesting the report.
- k. Indicate **Proper Authorization** was received to release the report.
- l. In the **Comments** box, enter any comments related to the release.

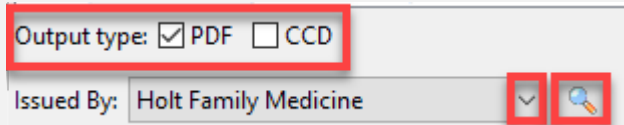
- **Note:** The maximum number of characters in the Comments box is 1000.



The screenshot shows the 'Release Details' window with several fields highlighted by red boxes and labeled with letters: 'a' points to the 'Purpose' dropdown (set to 'Continuation of Care'), 'b' points to the 'Destination' field (set to 'Great Lakes OB'), 'c' points to the 'Requester' field (set to 'Dr. Bob Smith'), and 'd' points to the 'Comments' text area (containing 'patient transferring providers, sending for Continuation of Care purposes.'). The 'Proper authorization received?' checkbox is checked.

13) Select an **Output Type**:

- a. PDF – to create a PDF file.
- b. CCD – to create a Continuity of Care Document for purposes of Meaningful Use.
- m. **Note:** PDF will default and can only be changed if Person was chosen as the Report Scope.



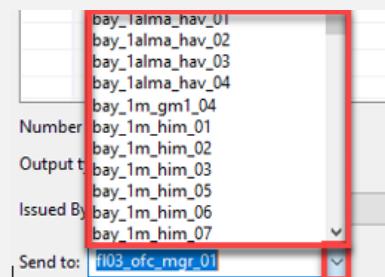
The screenshot shows the 'Output type' section with two radio buttons: 'PDF' (which is selected) and 'CCD'. Below this, the 'Issued By' field is set to 'Holt Family Medicine' and has a magnifying glass icon to its right.

14) **Issue By:** Choose the issuing facility that is creating the report.

- n. Use the **Magnifying Glass** icon to search for the facility if needed.

15) **Send to** dropdown choose:

- a. **To Print:** choose the appropriate printer from the dropdown.



The screenshot shows a dropdown menu for the 'Send to' field. The menu is open, displaying a list of printer options: 'bay_1alma_hav_01', 'bay_1alma_hav_02', 'bay_1alma_hav_03', 'bay_1alma_hav_04', 'bay_1m_gm1_04', 'bay_1m_him_01', 'bay_1m_him_02', 'bay_1m_him_03', 'bay_1m_him_05', 'bay_1m_him_06', and 'bay_1m_him_07'. The 'Send to' field below the menu is set to '1103_ofc_mgr_01'.

b. **To Fax:** choose **Default Station** from the dropdown and select the **Properties** icon. In the **Default Station** window enter the:

- **Fax Number**
- **Contact information**
- Select a **Transmit Date/Time** option
- Click **OK**.

Send to: Default Station

Default Station

Fax Number (Maximum 30 Characters)
517-555-4877

Contact Information (Maximum 100 Characters)

Transmit Date/Time

Send Fax Immediately
 Send Fax at Specified Date and Time

Transmit Date: 3/30/2021
Transmit Time: 11:07

OK Cancel

16) When complete choose:

- o. **Send Report:** to send the report.
- p. **Preview Report:** to preview the report before sending.

Output type: PDF CCD

Issued By: Holt Family Medicine

Send to: Default Station

Reset Send Report Preview Report

17) To view the status of a request that has been submitted, click the **Submitted Requests** tab.

q. To remove a completed request, select the entry and click the red **X** icon. Users can also right-click on the entry and choose **Remove Request**.

- **Note:** *No Qualification means no information qualifies for this section.*

Request Status	Person Name	Requested Date/Time	Report Request Id	Output Device
In Process	ZZTEST, PATIENTFIVE	3/8/2021 2:52 PM EST	10863619	Central-ROI

18) Right click on a patient and choose **Display Report** view or print the requested report.