

Records Management

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Getting Started

What is Record Management?

Record Management is a component of Genus MD that allows you to:

- Review your unsigned Order Entry reports and apply an electronic signature utilizing your PCI PIN (Personal Identification Number)
- Edit an eligible unsigned report and Save Edits or Save and eSign the edited report.
- Review your Incomplete Records, print the Record Deficiencies report, and select deficient reports for electronic signature.

Follow these easy steps to eSign reports:

1. Select any number of reports to review from your Unsigned Report List.
2. Review and add the reports you want to sign to your eSign List.
3. Apply your PIN to electronically sign your reviewed reports.

Follow these easy steps to edit an eligible report:

1. While reviewing the report, click the Edit Report button.
2. Edit the text available in the text boxes within the Report Editor.
3. Click the Save Edits button or the Save and eSign button to complete the editing process.

Follow these easy steps to review Incomplete Records:


1. Click the Incomplete Records link on any page to go to the Record Deficiencies report.
2. Enter the parameter to display records outstanding greater than 'X' number of days. The default will display records outstanding greater than 30 days.



Choose to print the Deficiencies report for your reference or select reports for eSign to apply your electronic signature.

Preferences

What are Preferences?

The Preferences page allows you to customize certain views within the application.

To customize the display of reports in your Unsigned Report List, locate the Preferences icon  in the top right corner of the Record Management window.

1. Choose the columns to display in the Unsigned Report List.
2. Once the desired preferences have been selected, click the Save button. You will be reminded to complete the preference update process by clicking on the refresh component icon . You will return to the previous page. The updated preferences will not display until the refresh component icon  is selected.
3. Click the Cancel button to return to the previous page without changing preferences.

Unsigned Report List


What is the Unsigned Report List?

The Unsigned Report List displays all unsigned Order Entry module reports you have the authority to review and sign.

Navigating the Unsigned Report List






Below are some tips on navigating the Unsigned Report List:



From the Genus MD Homepage:

- To fully display the list, you may choose to increase the size of the Record Management component within the Genus MD Homepage.
 1. Click Personalize in the Genus MD header to maximize the horizontal width of the Record Management component across all columns of the Genus MD Homepage.
 2. Click the resize icon  for the Record Management component to adjust the vertical height of the Unsigned Report List.
- It may be necessary to Maximize the web browser window to fully display the page in the web browser.
- The eSign List link will be inactive until you have reviewed and added a report to the eSign list.
- When the eSign List link is active, the number in the parentheses will indicate the number of reports in the list will be indicated.

Report Status

The icons on the Unsigned Report List indicate the status of a report. Below is a list of the statuses and their description:

-  - Incomplete. The system was unable to process your previous eSign request to sign or edit this report. When this status applies to a report, the entire row of information in the Unsigned Report List will be bolded. Please review the report again and apply your PIN to eSign.
-  - PIN needed. The report has been reviewed and added to the eSign list but your PIN has not been applied. Go to the eSign list and apply your PIN to complete the eSign process.
-  - Locked. The report is in use by another user on the CPCS system.
-  - Processing. The request to eSign or edit this report is currently processing. When the eSign process is successful and complete, the report will be automatically removed from your Unsigned Report List. When the edit process is successful, the report status will be available. When the edit and eSign process is successful, the report will be automatically removed from your Unsigned Report List.
-  - Queued. The request to eSign or edit the report is in a holding pattern, because the NMI connection to the CPCS database is not available. When the connection is restored, the reports will process without intervention from the user.
- Available – If no icon is present in the status column on the Unsigned Report List, this indicates that the report is available to review and eSign.

-  - Edited. This status will appear if someone else edited this report during your current session. You will need to review the report again and eSign. This status will only be viewed on the eSign Confirmation page.
-  - Canceled. This status will appear if the report status was changed during your current session from an available report to an unavailable report to eSign. This status will only be viewed on the eSign Confirmation page.

Note: It is possible to see two icons apply to a single report.



Searching the Unsigned Report List

You can search quickly for a specific patient. Use the search box above the report list to search for a specific patient.

1. Enter a patient's last name or first letter of the last name in the search box.
2. Click the Search for Patient button.
3. A highlighted match will appear on the list for the first person with the last name or letter entered. If the requested patient is not on the Unsigned Report List, the message, "The patient name could not be found." will display on the screen. Click the OK button.
4. Re-enter search criteria.

Sorting the Unsigned Report List

The Unsigned Report List is sorted by Patient last name in ascending order. You can be sort this view in other ways:




- Click the **blue bolded** column headings to change how the report list is sorted.
- The  icon indicates that the column is sorted in ascending order. The  icon indicates that the column is sorted in descending order. Click the column header to change the sort to either ascending or descending order.
- The All column and the Date of Birth column are non-sortable fields.

Selecting Reports to Review

There are several ways to build a list of reports to review. Choose any of these options to build a list:

- To select all reports for a specific patient, click the patient's name.
- To select all reports with the same ADM/SVC date for a specific patient, click the ADM/SVC Date for that patient.
- To select a single report for a specific patient, click the checkbox to the left of the patient name. You may select several reports using this method.
- To select all reports in the report list, click the All checkbox.

Note: Click the All checkbox again to de-select all reports.

Reports with a status of Locked , Processing , or Queued  cannot be accessed for review from the Unsigned Report List. If you try to select one of these reports, a message will notify you.

To begin reviewing the selected reports, click the Review Selected Reports button.



Report Detail Page

What is the Report Detail Page?

The Report Detail Page displays the detailed clinical data in the selected reports from the Unsigned Report List.

Navigating the Report Detail Pages

See the following tips on navigating the Report Detail Pages:

- The Report List link will return you to the Unsigned Report List. The reports previously selected for review in the Unsigned Report List will remain selected until they are either de-selected, skipped, or eSigned. To de-select previously selected reports, either uncheck the specific report, or Click the All column header until all reports are unchecked.
- The eSign List link will be inactive until you have reviewed and added a report to the eSign list.
- When the eSign List link is active the number of reports added to the list will be indicated by the number in the parentheses. If you click this link, you will go to the eSign List page to eSign those reports. (The report currently being reviewed will not be added to the eSign List.)
- The number of reports selected for review will be displayed in the title bar (Report Detail: 1 of 4).
- Navigate through the reports using the Previous Report, Add to eSign List, or Next Report buttons; or use the selected reports drop down list to go to a specific report.
 1. Previous Report - takes you back one report in the list without adding the current report to the eSign List.
 2. Add to eSign List – adds the report you are viewing to the eSign List and then presents the report detail of the next report.
 3. Next Report – takes you to the next report in the list without adding the current report to the eSign List.
- Click the Edit Report button to edit the report currently being viewed in the Report Detail page.
- The report status is displayed in the upper right corner. Below is a list of the statuses that may appear and their descriptions:
 1.  Incomplete. The system was unable to process your previous eSign request to sign this report. Please review the report again, click the Add to eSign List button and apply your PIN to eSign.
 2.  - PIN needed. The report has been reviewed and added to the eSign list but your PIN has not been applied. Go to the eSign List and apply your PIN to complete the eSign process. You may also remove the report from the eSign List by clicking the Remove from eSign

List button, which replaces the Add to eSign List button for this status.

3. Available –indicates that the report is available to review and eSign.
 - When the Add to eSign List button is selected, the report will be added to the eSign List, the report's status will change to ✖ (PIN needed), and the next report in the list will display. When the last report in the list is added to the eSign List, the eSign List page will automatically display.
 - If only one report was selected for review, the Previous Report and Next Report buttons will be deactivated.
 - If 2 or more reports were selected for review, the Previous Report button will be deactivated when reviewing the first report in the list.
 - If 2 or more reports were selected for review, the Next Report button changes to Go to eSign List when reviewing the last report in the list. (Choosing the Go to eSign List button will skip the last report and will not add that report to the eSign List.)

The 20 Report Limit

To optimize the systems' application resources, Record Management has a limit of eSigning 20 reports at a time. When you add the 20th report to the eSign list, the eSign List page will display a message prompting you to enter your PIN.

Enter your PIN and click the eSign Reports button. If you had selected more than 20 reports to review, you will go to the next report in the Report Detail page to continue to review your selected reports and add them to the eSign List.

For example, you selected 35 reports from the Unsigned Report List for review. You reviewed these reports and were automatically sent to the eSign List when you added your 20th report to the eSign List. After you enter your PIN, the application will confirm your selection to eSign 20 reports. You will be directed back to the Report Detail page where the 15 remaining reports will be available for review.

eSign List

What is the eSign List?

This is a list of the reviewed reports that were selected to eSign. Enter your PIN (Personal Identification Number) to complete the eSign process.

PIN (Personal Identification Number)

Your PIN for Record Management is the same PIN used in PCI. Please contact your Physician Support Coordinator if you are having PIN problems.

The action of entering a PIN applies your electronic signature to the reports selected in the eSign list or saves your edits and applies your electronic signature to your edited report from the Report Editor. An electronically signed report becomes a permanent part of the patient's medical record.

You have three opportunities to enter a valid PIN. After the third incorrect PIN entry, you will be directed to the Unsigned Report List and your eSign List will be cleared. However, the previously selected reports will continue to be selected in the Unsigned Report List.

Note: If you exit Record Management before applying your PIN to sign the reports in the eSign List, signatures will not be applied; your eSign List will be cleared, and all selected reports in the Unsigned Report List will be de-selected.

Navigating the eSign List

See the following tips on navigating the eSign List:

- To de-select a report for signature, remove the check in the To Be Signed column. Check the To Be Signed column again to select the report for eSign.
- The eSign List may be sorted by Patient Name or Report Name. Click the column header to sort by that column. The icon ▲ indicates that the column is sorted in ascending order. The icon ▼ indicates that the column is sorted in descending order.
- The Report List link will return you to the Unsigned Report List. The reports selected for eSign on the eSign List will remain on the list until they are either de-selected, eSigned, or you exit Record Management prior to applying a PIN.

Note: If you exit Record Management before applying your PIN to sign the reports in the eSign List, signatures will not be applied; your eSign List will be cleared, and all selected reports in the Unsigned Report List will be de-selected.

eSign Confirmation


What is eSign Confirmation?

This page will confirm the number of reports that will be processed for electronic signature.

When you enter a valid PIN and click the eSign Reports button, the system will check to see if any of the reports were locked, edited, or canceled in PCI during your current eSign session.

There are two possible scenarios:


1. If the report(s) was not locked, edited, or canceled in PCI during the current eSign session, an eSign confirmation page will display the following message:

 You requested to eSign 7 reports. 7 reports are currently processing.

Click OK to return to the Unsigned Report List if less than 20 reports were selected for eSign.




If the application directed you to the eSign List after adding 20 reports for eSign, Click OK to return to your Report Detail page to continue to review your selected reports for eSign.

2. If the selected report(s) was locked, edited, or canceled in PCI during your current eSign session, an eSign confirmation page will display the following message:

 You requested to eSign 6 reports. 4 reports are currently processing.

 2 reports could not be processed. These reports were either LOCKED, EDITED, or CANCELED during your current session.

The reports not processed will be listed by patient name, report name, and report date with either

-  - Edited status to indicate that someone else edited the report during the current eSign session
 -  - Locked status to indicate that the report is now locked in CPCS
 -  - Canceled status if the report status was changed during your current session from an available report to an unavailable report to eSign
- Click OK to return to the Unsigned Report List if less than 20 reports were selected for eSign.
 - If the application directed you to the eSign List after selecting 20 reports for eSign, click OK to return to your Report Detail page to continue to review

your selected reports for eSign.

- Locked Report notification – Someone is now viewing this report in PCI since you selected this report for review. The report will remain in your Unsigned Report List. Select the report for review again when it is not locked.
- Edited Report notification – Someone has edited this report in PCI since you selected this report for review. The report will remain in your Unsigned Report List. Select the report again to review the edited report.
- Canceled Report Notification – The report status was changed during your current session from an available report to an unavailable report to eSign. The report will be removed from your Unsigned Report List.

Report Editing

What is Report Editing?

Report Editing allows you to edit a report and either Save Edits or Save and eSign the edited report.

- Save Edits – This option will save your edits and allow you, or other eligible users, to continue to edit the report in future sessions.
- Save & eSign this Report – This option will save your edits and eSign the edited report in a single step. You will be prompted for your PIN. A successful PIN entry will complete the report editing and electronic signature process for this report.

Access to Report Editing

If your facility has not provided you access to the report editing feature in PCI, you will not see the Edit Report button on the Report Detail Page. Please contact your Physician Support Coordinator regarding your report editing access in PCI.

If the Edit Report button is available on the Report Detail Page but is inactivated, one or more of the following conditions exist:

- The Days to Edit parameter has expired. Every facility determines the number of days a report is available for editing. Most facilities set this parameter to 30 days after the patient discharge date. Therefore, if your patient was discharged over 30 days ago, your access to edit that unsigned report will be denied.
- Another physician has signed the report. In some cases, reports can be available for signature for two or more physicians. If a report has been signed, it will not be available for editing.

It is also possible that a report you want to edit will be locked, or in use, by another user in PCI. There are two possible scenarios:

- If the report is locked when you click the Edit Report button, you will be notified that the report is locked and who is currently accessing the report in

PCI. You may select the report again for review from the Unsigned Report List when the status returns to "Available".

- If the report is locked after you have edited the report and clicked either Save Edits or Save & eSign this Report, you will be notified that the report is locked and who is currently accessing the report in PCI. You may either return to the Report Editor to continue to edit or select the report again for review from the Unsigned Report List when the status returns to "Available".

Navigating the Report Editor

See the following tips on navigating the Report Editor:

- Save Edits – This option will save your edits and allow you, or other eligible users, to continue to edit the report in future sessions.
- Save & eSign this Report – This option will save your edits and eSign the edited report in a single step. You will be prompted for your PIN. A successful PIN entry will complete the report editing and electronic signature process.
- Exit Report Editor - This option will allow you to exit the Report Editor without saving your changes.
- Report Editor – The report sections available for editing will be presented in scrollable text boxes. Just click your mouse in the text box to begin editing. The report sections available for editing are defined by your facility.

Incomplete Records (Deficiencies)

What are Incomplete Records (Deficiencies)

Incomplete Records are defined as patient records that require action to facilitate the completion of a specific record, either deficient or delinquent.

- Deficient is a patient record that requires action.
- Delinquent is a patient record for which an action is overdue. Each facility defines the timeframe when a record becomes delinquent.

Navigating the Record Deficiencies Report


Accessing the Record Deficiencies Report:

- From any Record Management page, click the Incomplete Records link.

Entering the deficiencies parameter:

- The default deficiencies parameter is 30 days. Click the Go to Deficiencies Report button to display the records on your Record Deficiencies Report that are older than 30 days.
- You may customize your deficiencies parameter at any time. The maximum number of days is 99.

Printing the Deficiencies Report:

- Click the printer icon  in the upper right corner of the report.
- Choose your printer settings. Landscape orientation may be the best setting to have your report fit horizontally on a single page.

- Click the Print button or click OK.

eSigning Reports from the Deficiencies Report:

- If the Incomplete Reason is tied to an OE report that requires your signature, a checkbox will be present in the left column.
- Check the checkbox and click the Review Selected Reports button.

Glossary

ADM/SVC date

This is the date the patient was admitted to the facility or other services were provided.

Deficiencies

An incomplete patient record that requires action.

Delinquent

A patient record is delinquent when an action is overdue. Each facility defines the timeframe when a record becomes delinquent.

eSign List

A list of reviewed reports that have been selected for eSign. Apply your PIN to these reports to complete the eSign process.








PIN (Personal Identification Number)

This number is used to authenticate your signature when signing reports. This is the same PIN that you use in PCI. Please contact your Physician Support Coordinator if you have questions regarding your PIN.

Note: If you exit Record Management before entering your PIN to apply your electronic signature, your eSign List will be cleared.

Report Status

The icons on the Unsigned Report List, the Report Detail page, and the eSign Confirmation page indicate the status of a report. Here is a list of the statuses and their description:

-  - Incomplete. The system was unable to process your previous eSign or edit request. When this status applies to a report, the entire row of information in the Unsigned Report List will be bolded. Please review the report again and apply your PIN to eSign.
-  - PIN needed. The report has been reviewed and added to the eSign list but your PIN has not been applied. Go to the eSign list and apply your PIN to complete the eSign process.
-  - Locked. The report is in use by another user on the CPCS system.
-  - Processing. The request to eSign or edit this report is currently processing. When the eSign process is successful and complete, the report will be automatically removed from your Unsigned Report List. When the edit process is successful, the report status will be available. When the edit and eSign process is successful, the report will be automatically removed from your Unsigned Report List.
-  - Queued. The request to eSign or edit the report is in a holding pattern, because the NMI connection to the CPCS database is not available. When the connection is restored, the reports will process without intervention from the user.
- Available – If no icon is present in the status column on the Unsigned Report List, this indicates that the report is available to review and eSign.
-  - Edited. This status will appear if someone else edited this report during your current session. You will need to review the report again and eSign. This status will only be viewed on the eSign Confirmation page.
-  - Canceled. This status will appear if the report status was changed during your current session from an available report to an unavailable report to eSign. This status will only be viewed on the eSign Confirmation page.

Note: It is possible to see two icons apply to a single report.

Status Bar

The status bar appears at the bottom of the browser and displays information about what is currently being viewed on the page.

Title Bar

The title bar appears across the very top of the browser and displays information about what is currently being viewed on the page.