Release of Information (ROI) Feature

Formally known as the Correspondence Module

Purpose:

The MRI Release of Information (ROI) Feature allows your health records department to:

- log incoming requests for copies of patient records and update information about those requests (for example, indicate when a request has been fulfilled)
- view previously entered requests
- print reports that allow you to track pending and completed requests
- create standard formats for letters and print those letters
- maintain information about requester's names, addresses, and telephone numbers

ROI Desktop:

This desktop serves as the screen from which users can access key Release of Information (ROI) routines.

😽 Release of Information	Desktop - CLRH (ABATEST/ABA.TEST5.67/CHR	.TEST5.67 - Test) - Leanne P Mccarroll		
	(Request) (Requested			
Request Num				
Date Logged Date Needed		ID Verified Comment		Edit 🕑
Completed By				View 🖹 Print Letter 😵
	Patient Data	Send Requested Info To		Print Request 🔍
Med Rec Num Name		* Type Requester		Record Inquiry
EMR Number		*Name		Process 💕
Address		* Address		(EMR 📑
City		* City		Reports 🗊
Prov		* Prov		
Postal		Postal		
Email		Phone		
	New Request		Cancel Save	? @ 🛇 🗊 🗉



Routines:

Edit Routine

Request screen

Use the New Request button to enter a new request for information. After you click this button, the system generates a new request and assigns the request the next available request number.



The Request screen is used to enter or edit information about the requester, patient and request status.

😽 Release of Information					_ 🗆 ×
Udee Jones,(03/03/1991	Carl Med Rec Nui 23/M	m: ALOOO78342			
	EMR Num:	ABATVIG004221	81-FS1		
	(Request) (Requ	Jested Info) Fees (Hi	story)		
Request Num	4				
Date Logged Date Needed *Status Completed By	19/11/14 19/02/15 LOGGED	ID Verified Comment	Y		Edit 🔊 Amendment 🗈 View
	Patient Data		Send Requested Info To		Print Letter 🛛 🧐
Med Rec Num Name EMR Number Address City Prov Postal Phone Email	AL00078342 UDEE JONES,CARL ABATVIG00422181-FS1 1 HAPPY ST LETHBRIDGE AB T1J 4L1 (403)569-8527	* Type Requester *Name *Address * City *Prov Postal Phone	HCP DR. SMITH PO BOX 10 LETHBRIDGE AB TOL OVO (403)123-4567		Record Inquiry (2) Process (3) EMR (2) Reports (3)
	New Requ	est	Ca	ncel Save	?@\$#=



Requested Info Screen

Use this screen to enter or edit information about the requested information including type, dates covered, on-hold reasons, and notifications of disclosure.

Note: Requested Information and On Hold mnemonics will be different within each HCIS. This is an example only.

🔄 Release of I	Information Desktop - CLRH (ABATES	/ABA.TEST5.67/CHR.TEST5.67 - Test] - Leanne P Mccarroll	
Udee .	Jones,Carl	Med Rec Num: AL00078342	
03/03/	/1991 23/M	EMD Num: ABATVICO0422181-ES1	
	R	quest Requested Info Fees History	
	Requested Information		
	2 D	2	
	3 EC	3	
	5	4 5	
	6	6	
	7	7	Print Request
	8	8	Record Inquiry
	From Date 14/11/14		Process 🗊
	Thru Date 14/11/14		EMR 😭
	On Hold Peason		Reports 🔊
	1 OFF SITE		
	2		
	3		
		J	
		New Request	cel Save ? 🕼 🛇 🏦 🗉



Fees Screen

Use this screen to track fees for copying multiple sets of pages. You can track fees for up to 4 sets of pages. For each set, you can enter the following information:

- Number of pages
- Fee per page
- Whether the requester paid for the request.

The total amount for the number of pages based on the fee you entered appears in the Total field. For each set of pages, you can also enter a comment

😽 Release of Inf	ormation Deskto	p - CLRH (ABATEST/ABA.TEST5.67/CHR.TEST5.67 - Test) - Leanne P Mccarroli		
Udee Jo	ones,Carl	Med Rec Num: AL00078342		
03/03/1	.991 23/1	" EMR Num: ABATVIG00422181-FS1		
		Request (Requested Info) Fees (History)		
	Pages Fee Paid Total Comment	1 25.00 Y 25.00 INITIAL SEARCH FEE		
	Pages Fee Paid Total Comment	50 0.25 N 12.50 PHOTOCOPY FEES		Edit Print Letter Print Letter Print Letter Print Letter Print Request Print Print Request Print Request Print Request Print P
	Pages Fee Paid Total Comment	2 1.00 N 2.00 MICROFICHE COPY FEES		Process DP EMR C Reports DP
	Pages Fee Paid Total Comment			
		New Request	Cancel Save	, ?@&@E



History Screen

Use this screen to view audit trails of status and letters printed for the current ROI request.

The Status History lists all status changes with the date filed and user.

The Letter History lists mnemonics of all letters printed for the current request with the date printed and user.

Note: To sort by a particular column header, click the header.

📇 Release of Informa	ation Desktop - CLRH (AB#	ATEST/ABA.TEST	5.67/CHR.	TEST5.67 - Te	st) - Leanne P Mccarroll				_ 🗆 X
Udee Jone 03/03/199	e s,Carl 1 23/M	Med Rec I	lum: Al	_00078342					I
		EMR Num:	AB	BATVIGO0422	181-FS1				
		(Request) (Re	augeted 1	Info Ecoco	listory				
		Request	questeu.		history				
		St	atus I	History					
	Data Filed -	C.		-	llcor			Edit	E
	Date Filed ▼		atus n	154136	User			Amendmen	t 🗈
	20/01/15	LOGGED		332407				View	الم
								Print Letter	· 🔊
								Print Reque	est 🔍
								Record Inq	uiry 🖃 🤋
								Droposs	
								Process	
		L	etter i	listory					<u> </u>
	Date Printed 🔻	Letter			User			Reports	P)
	06/01/15	COV NO FEE	332	407					
	20/01/15	COV NO FEE	332	407					
	20/01/15	COV NO FEE	332	:407					
						Connect			
		New Re	quest			Cancel	Save	? 🕼 😂	1
								\sim	

Amendment Routine - Not used.



View Routine

Use this screen to view information about the request, requested info, fees and history.

5/05/1991	EMR Num:	ABATVIG00422	2181-FS1	
	(Request) (Reques	ted Info Fees (History	
Request Num	4			
Date Logged	19/11/14	ID Verified	Y	
Date Needed	19/02/15	Comment		(mate
Status	LOGGED			Ealt
Completed By				Amendment
	Patient Data		Send Requested Info To	View
Med Rec Num	AL00078342	Туре	НСР	Print Letter
Name	UDEE JONES,CARL	Requester		Print Request
EMR Number	ABATVIG00422181-FS1	Name	DR. SMITH	Depend Incuiru
Address	1 HAPPY ST	Address	PO BOX 10	 Record Inquiry
City		City		 Process
Broy	AB	Drov	AB	 EMP
Postal	T11411	Postal		
Phone	(403)569-8527	Phone	(403)123-4567	 Reports
	(,		(100)110 1001	

Print Letter Routine - Currently used in CHR only

Use this screen to define the criteria you want to use to print one or more Release of Information letters from the Letter Dictionary for the requests you identify on the Release of Information (ROI) Desktop screen.

In this routine, you can indicate whether you want to use the MS Word version instead of the version created with the MEDITECH Word Processor.

*Request
Letter Type ROI
*Letter
Use MS Word Queue or Print



Print Request Routine

Use this routine to print the Release of Information request detail report that includes the following information:

- Any information entered for that request via the Enter/Edit Release of Information ROI Requests Routine (for example, requester mnemonic)
- The dates the request was logged into the Release of Information (ROI) Feature, the last letter was printed, and the request was completed
- An activity log

							Edit	
							Amendment	
							View	
							Print Letter	
Request	Num						Print Request	_
Chequest	indini						Record Inquiry	
							Process	
							EMR	
							Reports	
ATE: 10∕02	2/15 @ 1014	Red Deer Reg	ional Hos	pital Ct:	r *Med Rec*		PAGE 1	
SER: 15413	36	RELEASE OF	INFORMATI	ION REQUE	ST DETAIL			
EQUEST NUI	1 22				STATUS: ON HOLD	TYPE :	MAN	
ed Rec Nu	GG00051668							
	UDMRI BRIG	HTICECREAM, TESIA	A ROS					
		ante:			DATE NEEDED:		07/02/15	
EQUESTER		2115			LAST LETTER:		00/01/13	
NAME :	SITE MANAG	ER	-		COMPLETED BY:			
AUURESS:	RED DEER F	AB -	-					
PHONE :								
		PAGE	3	FEE	PAID?	TOTAL		
N HOLD REA	SONS							
	L	VERIFYING REA	CORD LOCAT	TION				
	L 10/12/14	VERIFYING REC	CORD LOCA1	TION				
ROM DATE HRU DATE	L 10/12/14 15/12/14	VERIFYING REC	CORD LOCAT	TION				
ROM DATE IHRU DATE	L 10/12/14 15/12/14	VERIFYING REA	CORD LOCAT	TION				
ROM DATE THRU DATE EQUESTED 1	L 10/12/14 15/12/14 INFO AUT	VERIFYING REC	CORD LOCAT	TION				
ROM DATE HRU DATE EQUESTED :	L 10/12/14 15/12/14 INFO AUT ADM	VERIFYING REX AUTOPSY ENTIRE ADMISS	CORD LOCAT	LION				
FROM DATE IHRU DATE REQUESTED :	L 10/12/14 15/12/14 INFO AUT ADM	VERIFYING REX AUTOPSY ENTIRE ADMISS	CORD LOCAT	LION				
TROM DATE THRU DATE REQUESTED : COMMENTS	L 10/12/14 15/12/14 INFO AUT ADM FROM LAST	VERIFYING REX AUTOPSY ENTIRE ADMISS ADMISSION ONLY	CORD LOCAT	TION				
TROM DATE HRU DATE ÆQUESTED : XOMMENTS	L 10/12/14 15/12/14 MFO AUT ADM FROM LAST FROM LAST	VERIFYING REX AUTOPSY ENTIRE ADMISS ADMISSION ONLY ADMISSION ONLY	CORD LOCAT	LION				
FROM DATE INRU DATE REQUESTED : COMMENTS	L 10/12/14 15/12/14 MFO AUT ADM FROM LAST FROM LAST DATE	VERIFYING REX AUTOPSY ENTIRE ADMISS ADMISSION ONLY ADMISSION ONLY TYPE	CORD LOCAT	LION	TER			

The activity log, in the lower portion of the Release of Information request detail report, lists in chronological order all changes made to the request's status and all letters printed.



Record Inquiry

Use this screen to view medical record summaries.

clease of information Deskt	op · DRDH (ABA	ATEST/ABA.TE	ST5.67/DTH.T	EST5.67 -	Test) - Leanne F	P Mccarro	I			_	. 🗆 🗙
Udmri Loudkeyb 46/M 06/11/196	oard,Nate	Med Red	e Num: GGC	0051561		***	Confic	lential***		2	
		EMR Nu	m: ABA	TVIG004	06140-FSO	Ame	endmei	nt on File		J	
		Sig	jned Out	Portio	ns						
	Portion		Signe	d Out To		Da	te Out	•			
2		CODING				27/10)/14				
1		EMERGE	NCY ROOM			14/11	/14				
5		EMERGE	NCY ROOM			02/12	2/14	1			
4		ANESTH	ETIST STUD	(29/12	2/14	_			
10		EMERGE	NCY ROOM			05/01	/15	,			
IPF		ADMITT	ING			13/01	/15				
		Pen	ding Res	ervatio	ons					Edit	
Portion		Request	ed By 🔻		Comment		Da	ate Needed	_	Luit	
4	ANA			_			02/1	2/14		Amendment	- B
5	ANA						02/13	2/14	3	View	D
0	ANA			_			02/1	2/14	-	Print Letter	20
0	ANA						02/1	2/14		Print Decuest	-
10	BRYC			BRYCE	SIGNED OUT	CHART	05/0	1/15	-	Print Request	-
10	51110	Inc	complete	Record	ds	0111111	00/0			Record Inquiry	97
(Acr	ount Num	Type	Record A	vailable 🔻	Days Inc	Davs	Del			Process	- B
HT001	2664/14	FR	12/10/14	- anabio	121	00,0	001				\equiv
GG001	0080/14	IN	15/10/14		118	97				EMR	
GG001	0099/14	IN	14/11/14		88	67				Reports	- FB
GG001	0116/14	IN	15/12/14		57	36				Croporto	
GG001	0122/14	IN	02/02/15		8	0					
		Rele	ase Of In	format	tion						
	Re	quester	Date	Logged 🔻	Status						
			15/10/3	L4	ON HOLD						
	WCBAB		15/10/:	14	ON HOLD						
	WCBAB		27/11/:	14	LOGGED						
	ASGCS		02/12/3	14	LOGGED		-				
	DAVFFAU		02/12/.	. 4	LOGGED	_					~
									Close	? 🔞 🕹 🔒	

Process Requests Routine

Use the Process Requests routine to select multiple requests that you want to process.

😽 Re	elease of Information	n Desktop - CLRH (ABATEST	/ABA.TEST5.67/CHR.TEST5.67				-	
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							ĺ	
ſ		Paquast	Paquastar	Dationt	Status			
	3	Request	ALBERTA CANCER BOA	UDMRI BLACKSHEEP, 1ULIAN	ON HOLD			
	4		DR. SMITH	UDEE JONES,CARL	LOGGED		Edit	
	6		THE CO-OPERATOR'S IN	UDMRI BADTREE, SHAWNA L	COMPLETE		Amendment	- B
	1		WORKERS COMPENSA	UDCWS BLACKALIEN, KRYST	COMPLETE		View	
							Print Letter	B
							Print Request	89
							Record Inquiry	1
							Drocoss	
							FIOCESS	
						_	EMR	
							Reports	(fi)
_		0000			Come	0		
		New Add Edit Prin	nt Print Letter Complete	Save List	Cancel	Save	? 🕼 🗳 🟦	



After you save your selected requests, the Process Requests screen appears and you can process your requests via the footer function buttons.

🔄 Relea	se of Informati	on Desktop - CLRH (ABATEST/ABA.TEST	5.67/CHR.TEST5.67 - Test) - Leanne P Mccarroll			×
		RELEASE OF IN	FORMATION WORKLIST			
	Request	Requester	Patient	Status		
3		ALBERTA CANCER BOARD	UDMRI BLACKSHEEP, JULIAN	ON HOLD		
4		DR. SMITH	UDEE JONES,CARL	LOGGED		
6		THE CO-OPERATOR'S IN	UDMRI BADTREE, SHAWNA LYNN	COMPLETE		
		WORKERS COMPENSATION	UDCWS BLACKALIEN, KRYSTYNA	COMPLETE		
					_	
					Edit	P
					Amendment	ß
					View	EQ.
					Print Letter	EB.
					Dript Request	EK9
					Print Request	~
					Record Inquiry	12
					Process	ø
					EMR	
					Reports	e#)
					-	
					-	
	(
		New Add Edit Print Pr	rint Letter Complete Save List		Close ? @ 🛇 🗊 [

Use this routine to do any of the following, for one or more requests:

- New Enter a new request
- Add Add more requests to the list of requests to process
- Edit Edit existing requests
- Print Generate a Release of Information Detail Report that includes information about the request and Activity LogPrint Letter - Print a Release of Information letters and an address label (currently set up in CHR only)
- Complete Change the request status to COMPLETE
- Save List Save the user-specified requests as a compiled report that can then be listed, printed, or purged in the Release of Information (ROI) report routines

EMR Routine

Use this routine to access the EMR



Reports Routine

Accounting of Disclosures Report – not used.

Productivity Report – Use this report to list the total number of times a user filed activity within the ROI feature. This report can help HIM managers track user activity.

😽 Release of Information D	esktop - DRDH (ABATEST/ABA.TEST5.67/DTH.TEST5.67 - Test) - Leanne P Mccarroll	
	Release of Information Reports	
	Accounting of Disclosures Report	
	Productivity Report	
		Edit
		Amendment 🚯
		View 🖎
		Print Letter 🔫
		Print Request
		Record Inquiry
		Process 🔊
		(EMR 📑
		Reports
		(
		? 🖻 🛇 🏦 🗉

Reports ROI Menu

ROI Reports can also be accessed via Reports>ROI.

Meditech MRI Standard			
MPI Desktop	_		
Incomplete Records Desktop			
ROI Desktop		_	
Locator Desktop	Reports		BOI
Echart Desktop	MPI		KOI
Provider Management Desktop	Incomplete Records		Accounting of Disclosures Report
Patient Routines	Record Locator	•	Compiled Reports
Incomplete Record Routines 🔹 🕨	ROI		Productivity Report
System Management	Provider Management		
Reports			
Health Portal Routines			
Care Team			



Accounting of Disclosures Report and Productivity Report – Same as the reports on the ROI Desktop.

Compiled Reports - This routine allows you to compile reports for selected requests entered in the Enter/Edit Release of Information ROI Requests Routine. You can use the Compile Reports Routine to:

- define the specifications for a new report or edit an existing report's specifications
- compile information for a new report
- recompile a previously defined report to include updated information
- check the compilation status of reports created either with this routine or with the Process Requests Routine

After you compile a compiled report, use the Print Reports Routine to print reports and letters.

Re St	port TEST REPO atus COMPILED						
* Title TESTING							
Started Date/Time 08/03/05 1306 Selection CORR Stopped Date/Time 08/03/05 1306 Sort 1 Sort 2 Sort 3							
	*Select Field	Indexed	* Inc Exc Nil Any	*From Val	ue	* Thru Value	
1	LOG DATE	N	I	04/05/2003		04/05/2003	
2	NEEDED DATE	N	I	04/05/2003		04/05/2003	-
з	COMP DATE	N	I	04/05/2003		04/05/2003	
4	COMP USER	N	A				
5	LAST LET DATE	N	I	04/05/2003		04/05/2003	
6	REQUESTOR	N	A				
7	STATUS	N	I	COMPLETE		ON HOLD	
8	PAGES	N	A				
9	PAID	N	I	N		Y	
10	REQUEST	N	A				

Print Reports - This routine allows you to print compiled reports in the following formats:

- Narrow List, Wide List, or Workload Statistics
- Release of Information Letter





Purge Reports - The Purge Report Routine allows you to:

- purge a report's data
- purge a report's data and it's specifications

Report P	D TST RPT						
Status C	OMPILED						
Started Da	ite/Time	10/25/05		1348			
Stopped Date/Time		10/25/05	1348				
Count		1					
Title PRD Sort 1	TEST REPO	RT WWWWWWWW	wwwww	wwwwwwwww			
Title PRD Sort 1 Sort 2	TEST REPO	RT WWWWWWWW	wwwww	wwwwwwwww			
Title PRD Sort 1 Sort 2 Sort 3	TEST REPO	RT WWWWWWW	~~~~~	wwwwwwwww			

Halt Reports - Use this routine to stop the system from compiling a report.

Disclosure Information Customer Defined Screen (CDS)

The CDS completed by staff in CHR, DTH and ECH in 5.57, will not be available in the 5.67 version of Meditech. Please contact your HIM Records Management or Access and Disclosure Supervisor for more information.

MRI Custom Reports

Custom reports (aka NPR reports) can be found in the MRI BSS Custom Reports menu. This menu is currently organized by HCIS. Before Go Live, we hope to have this menu organized by each MRI Feature – MPI/Demo Recall, DIU, ICR, ROI, Locator, Public Health and Misc.

Applications				
ABS *David Thompson Health TEST 5.67*	•			
		MRI Desktop		MRI BSS Custom Reports
ADM *David Thompson Health TEST 5.67*	•	Meditech MRI Standard	•	ARH
				CHR
				DTH
EDM *David Thompson Health TEST 5.67*	►			ECH
			- 1	NLH
ITS *David Thompson Health TEST 5.67*	►			PCH I
MIS *David Thompson Health TEST 5.67*	►	Change your Password/PIN	Þ	PHR
MRI *David Thompson Health TEST 5.67*	⇒	MRI BSS Custom Reports	•	All HCIS's
			_	
		J		