

Locator Feature

Formally known as Record Locator Module

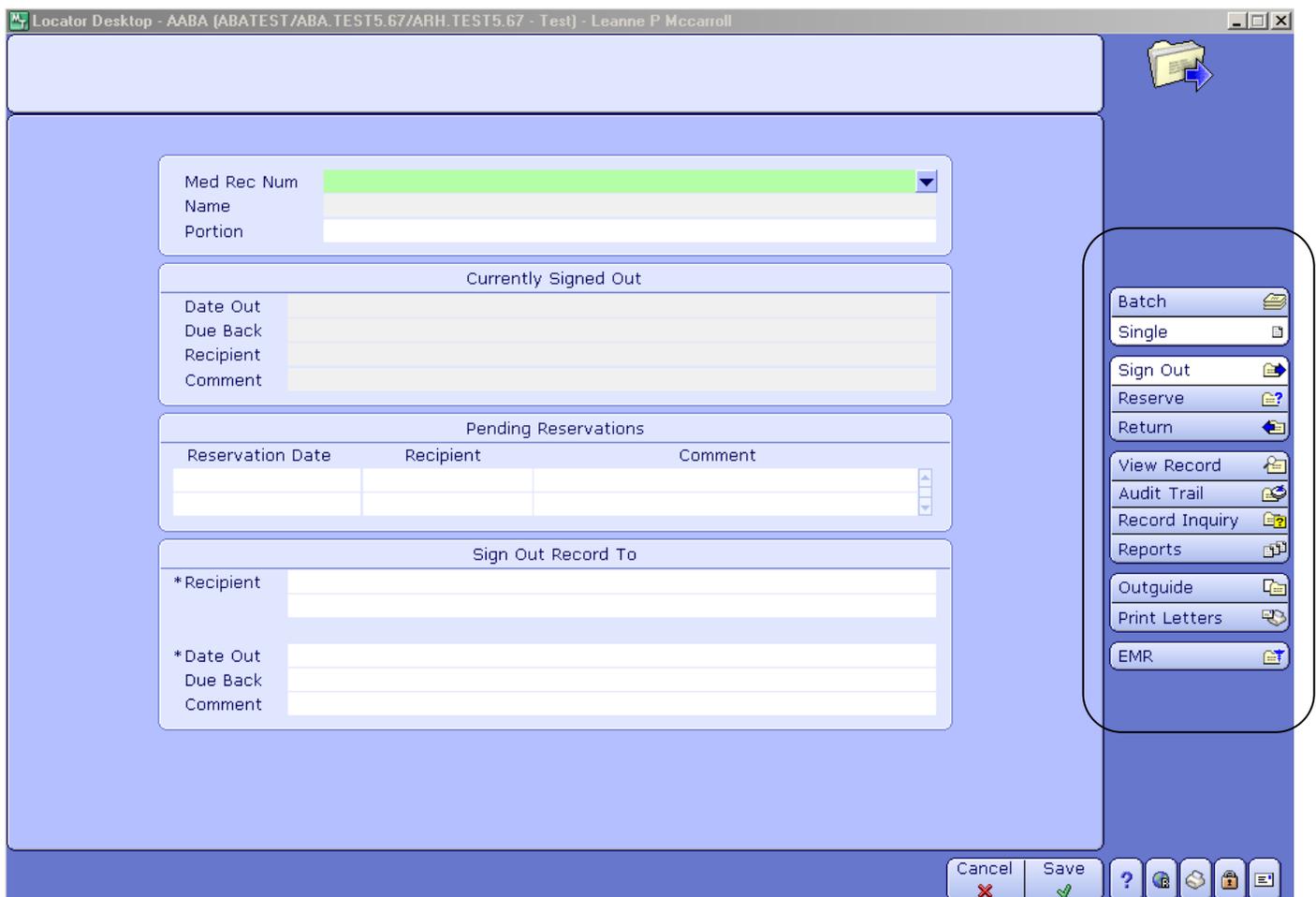
Purpose:

Use the Locator Feature to track the location of a patient's medical record(s). A record portion can be signed out of the Health Records Department to in-house or out-of-house recipients (for example, Iron Mountain).

Built-in controls help to manage the sign-out process. For example, you cannot sign out a portion that is already signed out to another recipient.

Desktop:

The Locator desktop serves as the main screen from which users can access the key Record Locator routines and reports.



Locator Desktop - AABA (ABATEST/ABA.TEST5.67/ARH.TEST5.67 - Test) - Leanne P Mccarroll

Med Rec Num

Name

Portion

Currently Signed Out

Date Out

Due Back

Recipient

Comment

Pending Reservations

| Reservation Date | Recipient | Comment |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Sign Out Record To

*Recipient

*Date Out

Due Back

Comment

Batch

Single

Sign Out

Reserve

Return

View Record

Audit Trail

Record Inquiry

Reports

Outguide

Print Letters

EMR

Cancel Save ? [Icons]

Routines:

The routines that make up this feature allow the Health Records Department to:

- Sign out, reserve and return record portions
- Monitor the location of record portions (such as printing a list of signed-out portions by recipient)
- Manage the record recipients (such as sending reminder letters to recipients with overdue record portions)
- Monitor the staff's productivity

Routines for Managing Record Portions:

| If you want to | Use the following |
|--|--|
| Sign out portions to recipients | Single Sign Out Record screen (for one record at a time) Batch Sign Out Record screen |
| Reserve a portion for a recipient | Single Sign Out Record screen or the Reserve Records |
| Print outguides and labels | Print Duplicate Outguides & Labels |
| Check a portion back in | Return Record Routine |
| Sign portion out to recipient when the recipient has reserved a portion | Return Record Routine |
| Cancel a reservation | Single Sign Out Record screen |
| When the Record Locator and Incomplete Record features are LINKED, transfer incomplete record portions from one recipient to another | Single Sign Out Record screen |
| Whether or not these two features are LINKED, bypass the reservation queue by signing out a portion to a recipient other than the one with the highest priority reservation (without canceling reservations) | Single Sign Out Record screen |

Sign Out Record Routine

You can use this routine to do any of the following:

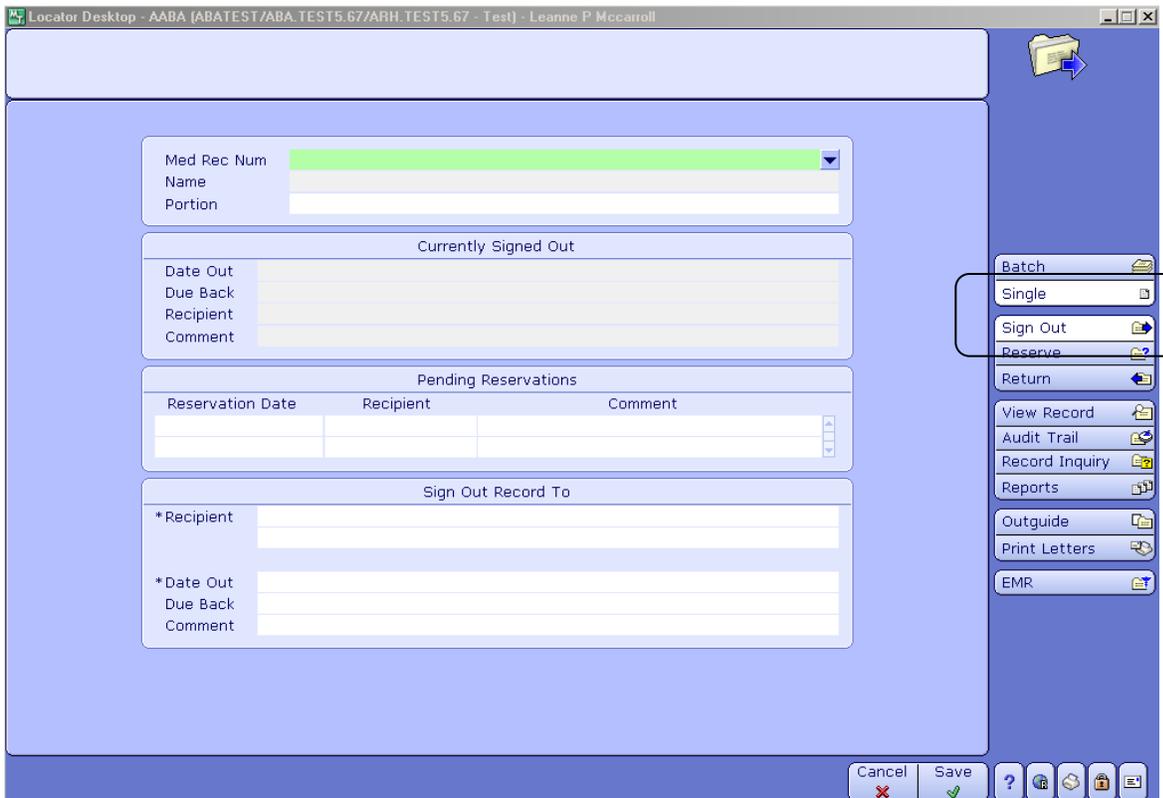
- Sign out and reserve one or more record portions for recipients.
- Move previously signed out records to a new recipient.

Accessing This Routine

To access this routine, click the Sign Out button from the MRI Record Locator desktop. The system displays one of two different screens, depending on whether you click the Single button or the Batch button (in addition to the Sign Out button).

| To | Click both of these buttons |
|--|--|
| Do any of the following: <ul style="list-style-type: none"> • Sign out and reserve record portions for recipients. • Move previously signed out records to new recipients. | Single and Sign Out (the Single Sign Out Record screen appears) |
| Sign out several available record portions at one time for one recipient. | Batch and Sign Out (the Batch Sign Out Record screen appears) |

Overview of the Single Sign Out Record Screen



The screenshot shows the 'Locator Desktop' interface. The main content area is divided into several sections:

- Med Rec Num:** A dropdown menu with a green highlight, and fields for Name and Portion.
- Currently Signed Out:** A table with columns for Date Out, Due Back, Recipient, and Comment.
- Pending Reservations:** A table with columns for Reservation Date, Recipient, and Comment.
- Sign Out Record To:** Fields for *Recipient, *Date Out, Due Back, and Comment.

The right-hand sidebar contains a menu with the following items: Batch, Single, Sign Out (highlighted with a red box), Reserve, Return, View Record, Audit Trail, Record Inquiry, Reports, Outguide, Print Letters, and EMR. At the bottom of the window, there are buttons for Cancel, Save, and several utility icons.

Use this routine to sign record portions out of the Medical Records Department to recipients either inside or outside the health care organization.

Note: A recipient can be an entry in either the MRI Locator Recipient Dictionary or the MIS Provider Dictionary.

You can sign out record portions for up to

- seven days in the future
- the number of days specified in the Locator Recipient Dictionary
- the number of days indicated in the **Locator Days On Loan To Drs.** field in the MRI parameters

To sign out the record portion for fewer days, you can edit the default due back date. This allows Health Records Department personnel to pull record portions on one day for delivery at a later date.

After a record portion is signed out, you cannot sign it out to another recipient (using this routine) until it is returned to the Health Records department using the Return Record Routine. However, you can transfer a record portion from one recipient to another without using these two routines.

Signing Out Other Records

When a record portion is signed out to one recipient, and another recipient has the top priority reservation, this second recipient is the default recipient (for example, the next recipient in line to receive the record portion). After the record portion is returned to the Medical Records Department via the Return Record Routine, the user would normally sign out the record portion directly to this default recipient.

However, you can sign out a complete record portion to a recipient other than the default recipient, thus temporarily bypassing the reservation queue established by this routine.

Reserving Record Portions

You can use the Single Sign Out Record screen to reserve a record portion that is currently checked out, has a prior reservation, or is otherwise unavailable.

If a record portion is already signed out (or unavailable), the system displays the location of the record portion and allows you to enter your reservation.

If you make a reservation, the system places it in a queue with other reservations for the same record portion. The system displays the rank of your reservation (**#**) and the total number of reservations made for that record portion (**T#**). For example, if there are two prior reservations when you enter a reservation, yours becomes #3 (third in line). These numbers appear at the far right of the screen (at the end of the block of information related to the specified portion).

Reservation priority is established chronologically. The recipient who makes the earliest reservation is the first in line to receive the record portion when it is returned.

Reserving Moved Records

After you move a record portion, you can choose to make a reservation for the previous recipient (for example, the one from whom you moved the record). That reservation will go to the top of the reservation queue (for example, the number one reservation), bumping recipients with prior reservations down one slot (for example, the former number one reservation now becomes the number two reservation).

If the Record Locator and Incomplete Records features are linked and you move an incomplete record portion, the system prompts you whether to make a reservation for Incomplete Records Processing. If the features are linked and you move a complete record portion, the system prompts you whether to make a reservation for the original recipient.

If the Record Locator and Incomplete Records features are not linked and you move a complete record portion, you have the choice of making a reservation for the original recipient in all cases.

The reservation made using this routine now has the highest priority and appears in the **Reserved For** field when the record portion is returned via the Return Record Routine. The user can then conveniently sign out the record portion again directly to the original recipient with the reservation who had the record before it was moved.

Returning Reserved Record Portions

When a reserved record portion is returned to the Medical Records Department, it is signed in via the Return Record Routine. At this point, the user can

- assign that record portion to the recipient at the top of the reservation queue (the default recipient)
- delete the default recipient's reservation and return the record portion to the Medical Records Department

Returning Moved Records

You can use either this routine or the Return Record Routine to return moved records.

Use the Reserve Record Routine, to return the moved record if you want to check for existing reservations. When the Incomplete Records and Record Locator Features are LINKED and you are returning an incomplete record, the recipient defaults to Incomplete Records Processing.

To use this routine to return a moved record portion, you move the current portion back to the original recipient.

Suspending the Incomplete Record's Days Outstanding Count (CHR, ARH, NLH, PCH only)

When an incomplete record portion is moved and the Record Locator and Incomplete Records features are LINKED, the system automatically suspends the **Days Incomplete** count for all accounts associated with that portion.

The system keeps a running total of the number of days that the incomplete record is not available for processing because it has been moved to another recipient. This number appears in the **Days Suspended** field of the Incomplete Records Desktop screen.

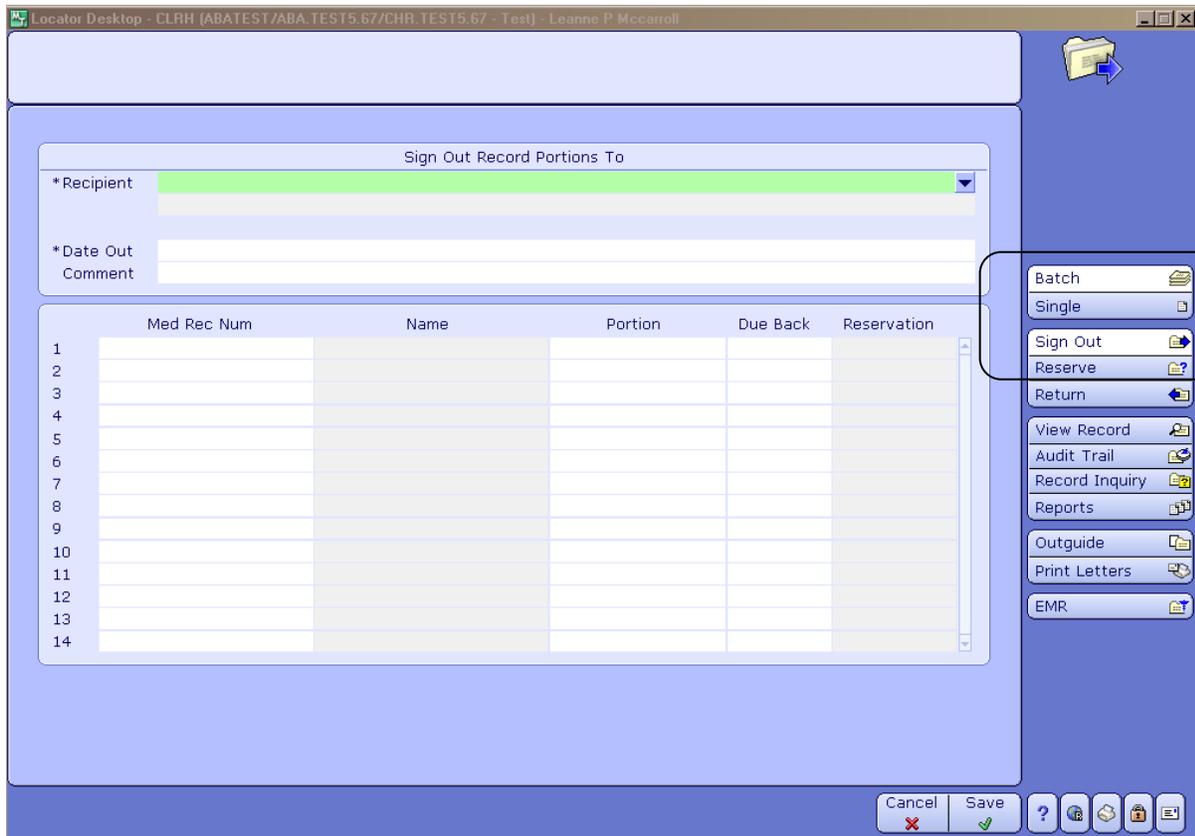
The system credits the doctor who is responsible for completing the moved record by subtracting the number of **Days Suspended** from the **Days Incomplete** for the doctor. Thus, the tally in the **Days To Process** field accurately reflects the number of days it takes the doctor to process the incomplete record.

Note: When you return a moved portion associated with more than one account to the incomplete records area, the count resumes for all of the portion's accounts.

Overview of the Batch Sign Out Record Screen

Use this routine to sign out several available record portions at one time for one recipient. After a record is signed out, you cannot sign it out to another recipient until it is returned.

You access this screen after you click both the Batch and Sign Out buttons from the MRI Record Locator desktop. To sign out or reserve single record portions, use the Single Sign Out Record screen (that is, click both the Sign Out and Single buttons).



Signing Out Records from the Batch Sign Out Record Screen

First, identify a recipient, and then identify all records and record portions that you want to sign out to that recipient. You also enter the date signed out and the date due back. You can also add a comment.

Unavailable Records

The Batch Sign Out Record screen prevents you from signing out a record portion if it is

- still signed out to another recipient
- reserved for another recipient with an earlier reservation (i.e., with a higher ranked reservation on the reservation queue)

The system prevents you from signing out the portion if either of the following is true.

- The portion becomes unavailable between the time you identify a portion and the time you file the routine.
- The system is filing and it is not possible to lock the portion.

Reserve Record Routine

Use this routine to reserve portions of a specified record for a recipient, but not sign the portions out. For example, your health care organization could assign this routine to users who can request record portions but who are not allowed to change the record's location.

Note: To cancel a reservation, use the Cancel Reservation button.

Accessing This Routine

To access this routine, click the Reserve button from the MRI Record Locator desktop. The system displays one of two different screens, depending on whether you click the Single button or the Batch button (in addition to the Reserve button).

The screen that appears determines whether you can reserve only one single record or multiple record portions (per recipient and reserve date).

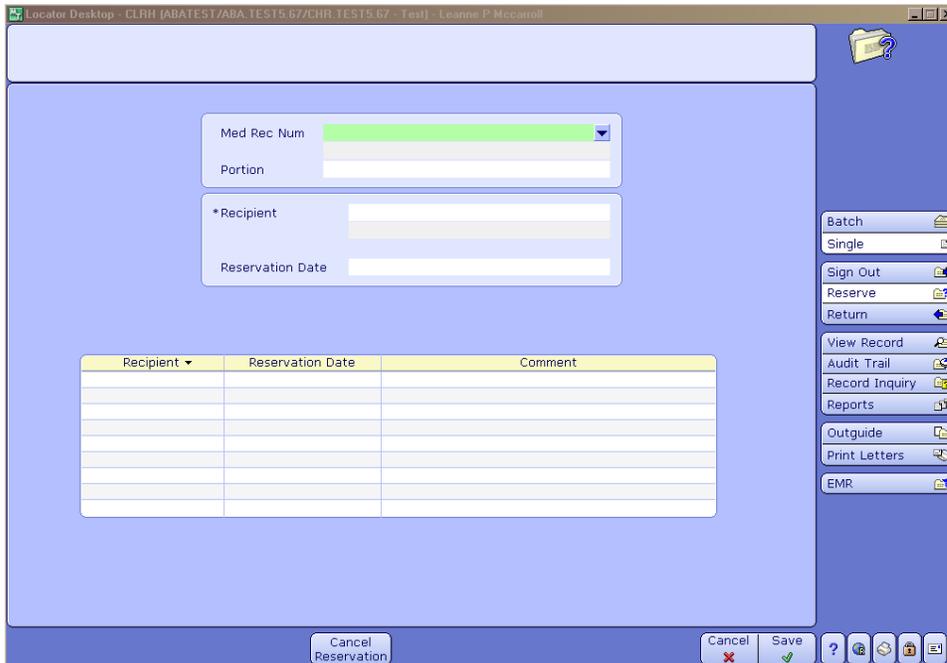
| To reserve | Click both of these buttons |
|--------------------------|---|
| Only one record portion | Single and Reserve (the Single Reserve Record screen appears) |
| Multiple record portions | Batch and Reserve (the Batch Reserve Record screen appears) |

Establishing Reservation Priority

After you make a reservation, the system places the reservation in a queue with other reservations for the same record. Reservation priority is established chronologically. That is, the recipient who makes the reservation first is the first in line to receive the record when it is returned. For example, if the first ranked recipient reserves the record for a week from today, and second ranked recipient reserves the record for today, the first recipient is first in line to receive the record when it is returned.

Single Reserve Record Screen

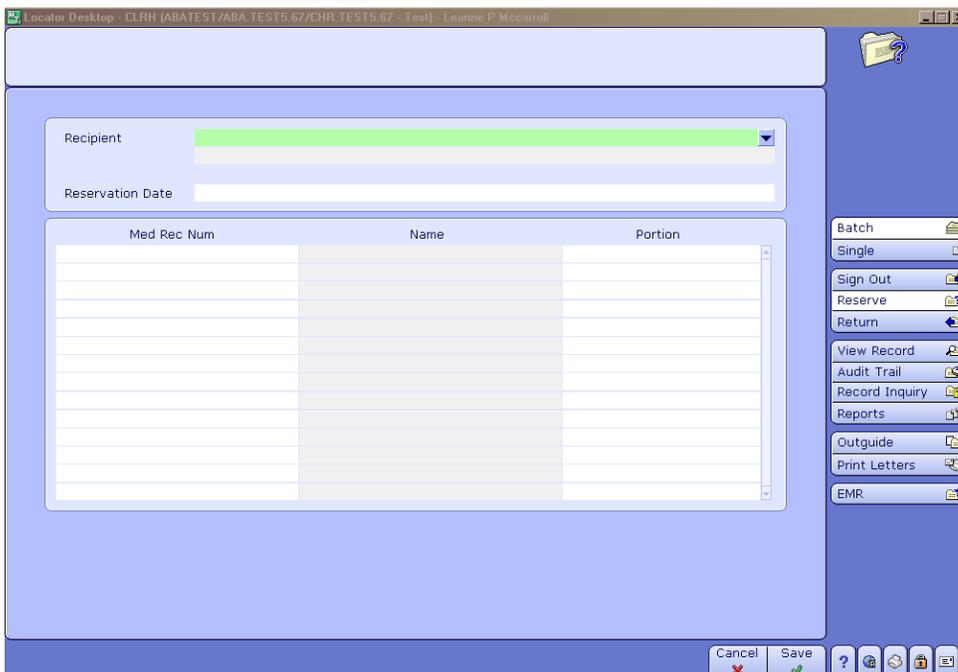
Use this screen to reserve a portion of a specified record for a recipient, but not sign the portion out.



The screenshot shows a software interface for reserving a portion of a medical record. At the top, the window title is "Locator Desktop - CLRH (ABATEST/ABA.TEST5.67/CHR.TEST5.67 - Test) - Leanne P McCarroll". The main area contains several input fields: "Med Rec Num" (a dropdown menu), "Portion" (a text field), "* Recipient" (a text field), and "Reservation Date" (a text field). Below these fields is a table with three columns: "Recipient", "Reservation Date", and "Comment". The table is currently empty. On the right side, there is a vertical menu with options: "Batch", "Single", "Sign Out", "Reserve", "Return", "View Record", "Audit Trail", "Record Inquiry", "Reports", "Outguide", "Print Letters", and "EMR". At the bottom, there are buttons for "Cancel Reservation", "Cancel", "Save", and a set of utility icons.

Batch Reserve Record Screen

Use this routine to reserve multiple portions of a specified record for a recipient, but not sign the portions out.



The screenshot shows a software interface for batch reserving portions of medical records. The window title is "Locator Desktop - CLRH (ABATEST/ABA.TEST5.67/CHR.TEST5.67 - Test) - Leanne P McCarroll". The main area features a "Recipient" dropdown menu and a "Reservation Date" text field. Below these is a table with three columns: "Med Rec Num", "Name", and "Portion". The table is currently empty. On the right side, there is a vertical menu with options: "Batch", "Single", "Sign Out", "Reserve", "Return", "View Record", "Audit Trail", "Record Inquiry", "Reports", "Outguide", "Print Letters", and "EMR". At the bottom, there are buttons for "Cancel", "Save", and a set of utility icons.

Cancel Reservation Button

Use this button to cancel reservations.



To cancel a reservation, select the reservation you want to cancel from the list on the screen, and then click this button.

Return Record Routine

Use this routine to do any of the following:

- Return record portions previously checked out (via the Single Sign Out Record screen) of the Medical Records Department
- Sign out reserved records to recipients
- Cancel the first reservation for a portion

Accessing This Routine

To access this routine, click the Return button from the MRI Record Locator desktop. The system displays one of two different screens, depending on whether you click the Single button or the Batch button (in addition to the Return button).

The screen that appears determines whether you can return or sign out only one single record or multiple records for any return date.

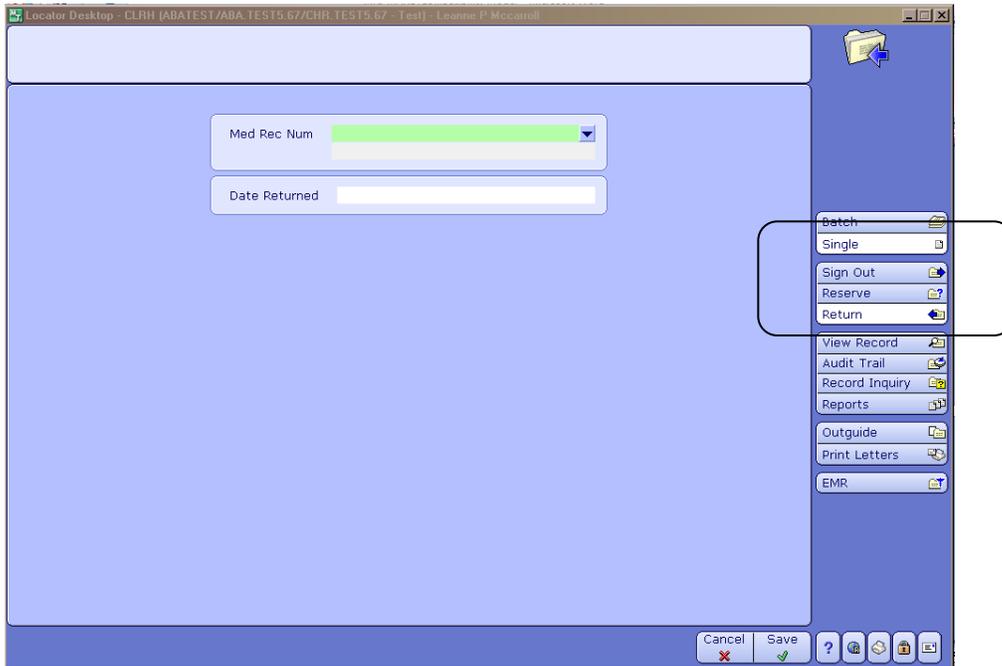
| To return or sign out | Click both of these buttons |
|-----------------------|---|
| Only one record | Single and Return (the Single Return Record screen appears) |
| Multiple records | Batch and Return (the Batch Return Record screen appears) |

Single Return Record Screen

Use this screen to do any of the following:

- Return a record portion previously checked out (via the Single Sign Out Record screen) of the Medical Records Department
- Sign out a reserved record to a recipient

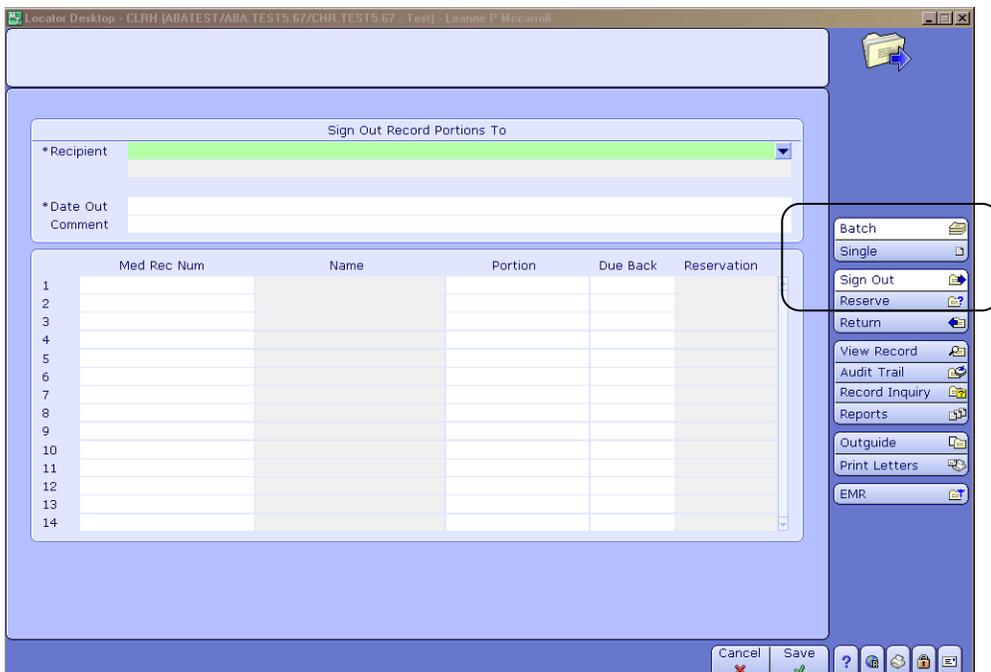
- Cancel the reservation for a portion



Batch Return Record Screen

Use this screen to do any of the following:

- Return multiple record portions previously checked out (via the Single Sign Out Record screen) of the Medical Records Department
- Sign out multiple reserved records to recipients
- Cancel the first reservation for a portion



Returning a Record That is Not Reserved

After you identify a record portion in the Return Record Routine the system checks to see if it has been reserved for a recipient. Recipients may be locator recipients or doctors. If so, the recipient's name, reservation date, and comment, if available, appear.

If the record portion has not been reserved, you can sign it back into the Medical Records Department via this routine.

Signing Out a Reserved Record

After you identify a reserved record portion in the Return Record Routine, the name of the recipient on top of the reservation queue appears. If you let this reservation stand (i.e., do not delete the reservation date), you automatically assign the record to this next recipient.

You can also return a reserved record and delete the reservation. If you later want to sign out that record to the recipient on top of the reservation queue, you first identify the record portion (as though you were returning it). The recipient's name and reservation then appear, and you can assign the record to this recipient.

View Record Routine

Use this routine to print or display the Locator Record Report, which indicates the location of a patient's medical record.

| | |
|-------------|---------------|
| Med Rec Num | CE00001121 |
| | SMITH,JOHN JR |

| DATE: 03/02/15 @ 1527 | Athabasca Healthcare Centre **MRI** | PAGE 1 | | | |
|---------------------------------|--|----------|----------|--------------|----------|
| USER: 154136 | LOCATOR RECORD | | | | |
| PB00054141 UDMRI BELACK,JONE | | | | | |
| PORTION | SIGNED OUT TO | DATE OUT | DATE DUE | RESERVED FOR | ON DATE |
| 1 ACCT: RU0013167/14 Inc SDC | ER | 29/01/15 | 30/01/15 | ICR | 02/12/14 |
| 2 | CRV | 20/11/14 | 27/11/14 | | |
| 3 | CRV | 20/11/14 | 27/11/14 | OCR | 20/11/14 |

Audit Trail Inquiry Routine

You can use this routine to print a Record Locator Audit Inquiry Report. All record locator activity for all portions of a specified record appears on this report. This report lets you track the record's movements, even after it has been returned to the Medical Records Department.

After a record is returned, the audit trail information is retained for a hospital-defined number of days and then automatically purged from the system.

Med Rec Num CE00001121
 SMITH,JOHN JR

Record Locator Audit Inquiry

RUN DATE: 23/08/96 Medical Records PAGE 1
 RUN TIME: 1035 RECORD LOCATOR AUDIT INQUIRY

M0000005 SARGENT,BETSY

| PORTION | DATE | TIME | DATE OF RECIPIENT | ACTION | RECORD | USER |
|----------|----------|------|----------------------|----------|----------|------|
| VOLUME 1 | 23/08/96 | 1032 | EMERG | SIGN OUT | 23/08/96 | MT |

Record Inquiry Routine

Use this screen to view medical record summaries.

| | | |
|-------------------------------------|---------------------------|---------------------------|
| Thomas, T 01/01/1980 26/F | Med Rec Num CE00000100 | ***Confidential*** VIP |
| | EMR Num DD0000150 | Amendment on File |

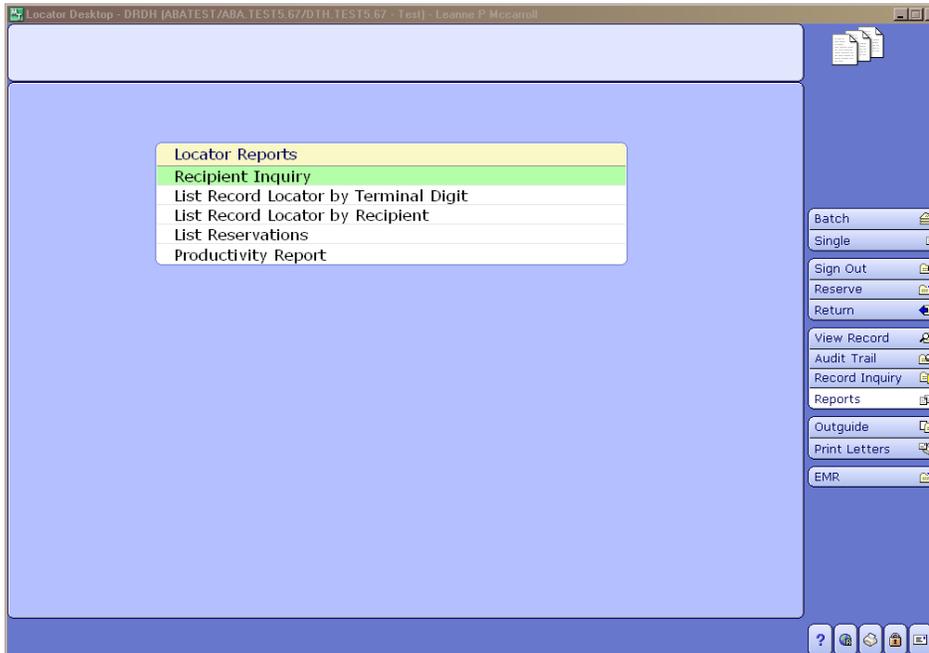
| Portion | Signed Out To | Date Out |
|--------------|---------------|----------|
| ALL | ICR Recipient | 07/21/06 |
| CE0000000189 | BETH GRENOBLE | 07/24/06 |

| Portion | Requested By | Reason | Date Needed |
|--------------|--------------|--------|-------------|
| CE0000000189 | 3N | | 04/17/06 |
| CE0000000189 | ADMCOORD | | 07/24/06 |
| ALL | ANESTH | | 07/24/06 |
| CE0000000189 | ICR | | 04/17/06 |

| Account Num | Type | Record Available | Days Inc | Days Del |
|--------------|------|------------------|----------|----------|
| CE0000000189 | IN | 03/24/06 | 250 | 245 |
| CE0000000754 | ER | 07/21/06 | 131 | 128 |
| CE0000001060 | ER | 08/08/06 | 113 | 110 |
| CE0000000650 | ER | 09/29/06 | 61 | 58 |

| Requester | Date Logged | Status |
|-----------|-------------|---------|
| AIGCSB | 20060425 | ON HOLD |

Reports Routine



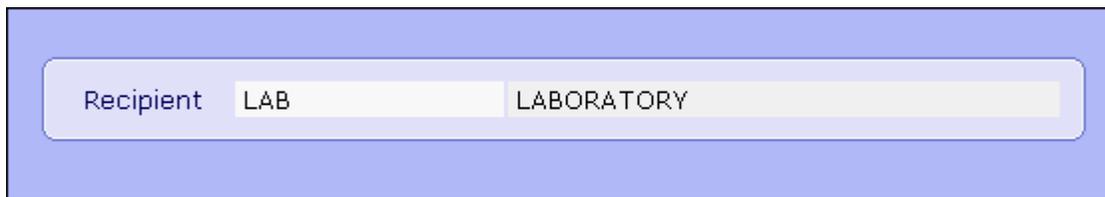
| Locator Reports |
|---------------------------------------|
| Recipient Inquiry |
| List Record Locator by Terminal Digit |
| List Record Locator by Recipient |
| List Reservations |
| Productivity Report |

| |
|----------------|
| Batch |
| Single |
| Sign Out |
| Reserve |
| Return |
| View Record |
| Audit Trail |
| Record Inquiry |
| Reports |
| Outguide |
| Print Letters |
| EMR |

Recipient Inquiry

Use this standard report to print the Recipient Inquiry Report that shows all record portions that were signed out to a user-specified recipient. The record portions are sorted by days overdue with the portion outstanding the longest appearing at the top of the list.

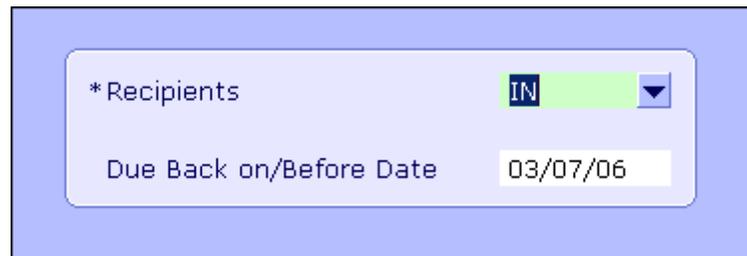
When a doctor is a recipient, the mnemonic is prefaced by a **d** followed by a space. For example, if the report is printed for Dr. Welby, and his mnemonic is WEL, the mnemonic appears on top of the report as **d WEL**.



Recipient LAB LABORATORY

List Record Locator by Terminal Digit

Use this standard report to print the Outstanding Records List by Terminal Digit Report. This report lists, in terminal digit order, all outstanding records due back in the Medical Records Department on or before a specified past or future date. You can print this information for in-house recipients, out-of-house recipients, doctors, or all three (for example, all recipients).



*Recipients IN

Due Back on/Before Date 03/07/06

Note: Mnemonics of recipients defined in the MIS Provider Dictionary are prefaced by a **d** followed by a space. For example, if a record is signed out to Dr. Welby, and his mnemonic in the Provider Dictionary is WEL, it appears here as **d WEL**.

List Record Locator by Recipient

Use this standard report to print the Records List by Recipient Report. This report lists, on a separate page for each specified recipient, all outstanding records due back in the Medical Records Department on or before past or future date.

You can print this information for in-house recipients, out-of-house recipients, doctors, or all three (for example, all recipients).

| | |
|-------------------------|-----------|
| * From Recipient | BEGINNING |
| * Thru Recipient | END |
| * Recipients | IN |
| Due Back on/Before Date | 03/07/06 |

List Reservations

Use this standard report to print a Reservations List. This report lists, on a separate page for each user-specified recipient, the record portions reserved for that recipient.

You can print this report for in-house recipients, out-of-house recipients, doctors, or all three (for example, all recipients). In addition, you can list all reserved record portions, or only those which are currently available to be signed out to the recipient.

| | |
|-------------------------------|-----------|
| * From Recipient | BEGINNING |
| * Thru Recipient | END |
| * Recipients | IN |
| * List Only Available Records | N |

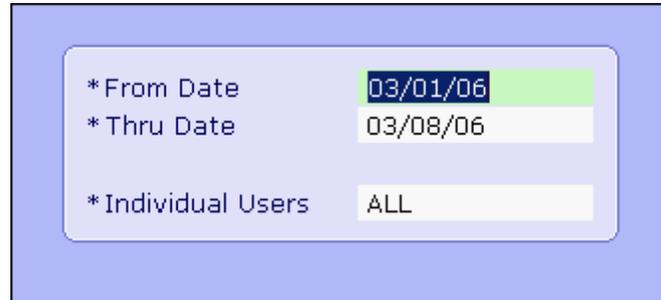
Productivity Report

Use this standard report to print the Locator Productivity Report. The system counts the number of times individual users filed the following screens or routines within a specified time period:

- Single Sign Out Record screen
- Return Record Routine

The report also provides a cumulative total number of times the routines were filed by users, the number of times they complete the routine after entering data.

The length of time the system keeps a record of user activity depends upon the number of file maintenance days for the locator audit trail in the MRI parameters.



| | |
|--------------------|----------|
| * From Date | 03/01/06 |
| * Thru Date | 03/08/06 |
| * Individual Users | ALL |

Overview of Reporting Record Locator Information

Use the following routines to print reports containing record location information.

| To | Use the following |
|--|---|
| Locate medical records that are signed out or reserved | View Record |
| List record locator activity for signed out record portions | Audit Trail Inquiry |
| List all record portions signed out to a specific recipient | Recipient Inquiry |
| List all records active in the Record Locator feature, sorted by: <ul style="list-style-type: none"> - Terminal digit - Recipient - Reservation | <ul style="list-style-type: none"> - List by Terminal Digit - List by Recipient - List by Reservations |
| Print the Chart Locator Productivity Report (that lists the number of times users complete and file certain report routines for a specified time period. | Productivity Report |

Outguide Routine – Not used.

Print Reminder Letters Routine – Not used.

EMR Routine

Use this routine to access the EMR.

Incomplete Records: The Link (CHR, ARH, PCH, NLH only)

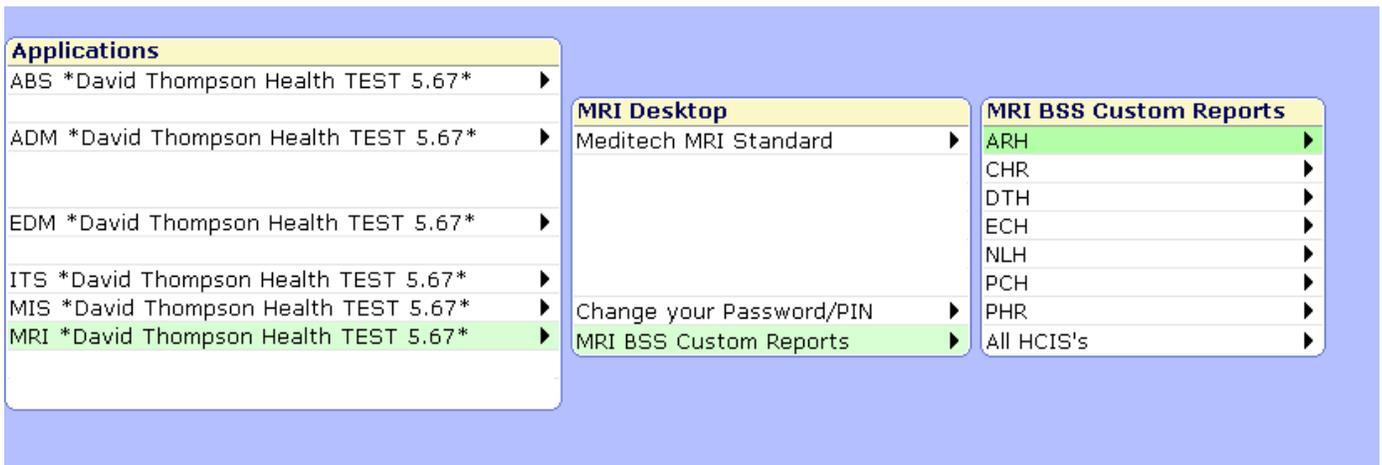
If the Record Locator and the Incomplete Records features are LINKED, any record that has an ICR reason attached to it will automatically be signed out to ICR (Incomplete Room) or IMF (Incomplete Main File).

If the record is moved to another recipient, the system will automatically reserve the record for recipient ICR or IMF.

When an incomplete record portion is moved, the system automatically suspends the **Days Incomplete** count for all accounts associated with that portion. Therefore, the physician will not have deficient days count against him/her if the chart is not available to him/her.

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 | MRI Desktop | MRI BSS Custom Reports |
|---------------------------------------|--------------------------|------------------------|
| ABS *David Thompson Health TEST 5.67* | Meditech MRI Standard | ARH |
| ADM *David Thompson Health TEST 5.67* | | CHR |
| EDM *David Thompson Health TEST 5.67* | | DTH |
| ITS *David Thompson Health TEST 5.67* | | ECH |
| MIS *David Thompson Health TEST 5.67* | Change your Password/PIN | NLH |
| MRI *David Thompson Health TEST 5.67* | MRI BSS Custom Reports | PCH |
| | | PHR |
| | | All HCIS's |