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# MEDICAL RECORDS PROCEDURES

User Guide

April 6, 2015

Home Health VNA  
Alison Basmajian

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## 1. Scanning Hospital Referrals to World Client – MR copier

**NOTE: ALL URGENT AND HOSPICE REFERRALS NEED TO BE SCANNED AS SOON AS RECEIVED**

Remove paper clips, staples and any notes attached to the documents

Login to copier in Medical Records and select, EMAIL

Select, **Address Book**

Select, **Search Network**

Select, **List all Public Entries**

Select, **MVH** or **VNA** (VNA unless Hospice is stamped on the front page)

Select, **To**

Select, **Close**

Select, **Subject**

Enter, Last Name, First Name MRN

Select, **Save**

Go to, '**EMAIL Options**' tab at top

Select, **FileName**

Re-enter, Last Name, First Name MRN

Select, **Save**

Put paper in feeder and press **Start**

Put confirmation sheet in folder

## 2. Scanning Hospital Referrals to World Client – Hospice copier

Login to copier

Select the **Email** tab on the right side of the screen

Select the **To** tab

Change the Address Book tab on the left side of the screen to **Public**

Type 'V' in the search box and hit Enter

The VNA and Hospice mail tab will be showing on the left side of the screen

Select the mail box you want and hit **Add** on the top right side of the screen and then hit **Done**

Select the **Edit** tab on the left side of the screen

In the edit box, clear out 'Xerox copy machine' by typing 'C' on the green pad or hit 'clear' on the screen

Enter patient last name, first name, MRN and **save**

To remove an email box hit remove on the bottom right side of the screen and repeat steps to add another email

### 3. Preparation of Hospital Referrals for scanning to MESA

Discard Intake sheets, usually the top 2, if any

Discard any pages not having to do with the patient (instructions, phone numbers, etc)

Cross out bar codes located on the left side of all pages in the referral

Put HSPREF (hospital referral) label on bottom left, put ID label on top left, write today's date on top

To create ID Label for each patient:

Open '**My Medrec**' on desktop (ID automation tool)

Double click Bar Code

Enter patients MRN in box, click **OK**

Select, **Print** (ZDesigner S4M-203 dpi Zpl)

Go back to bar code and select properties to create next MRN

When complete, file by last name in the bin next to the copier

#### 4. Scanning referrals to MESA – Single Sided forms

Every Monday, Wednesday, Friday scan referrals to MESA (ArcClient)

Take out groups of referrals, up to the day before today, (about 100)

(Staples, paper clips and loose notes should have already been removed)

Put all the referrals together and place them in the bottom tray of scanner, right side up and label at top

Open '**Scanning Workstation**' on desktop

Select, **Scan** top left menu bar

Select, **Batch** from drop down menu

Select, **TestSS** for HSPREF label (anything with a label is TestSS (Test single sided) or TestDS (Test double sided))

Select, **OK**

Enter Batch Number, (batch number can be any number per user, use the same number)

Check, **Document Grouping**, select **OK** (document grouping is anything with a label)

Scanner starts, wait to finish

Select, **Options**

Select, **Identify Now**

All the scans print to the screen ([Results](#))

Enter Batch # from the '**Do Not Use**' box (bottom left of the screen shot, see [Results](#)) on the [batch cover sheet](#). It will consist of the printer number, date, and time, i.e. 1102820140830

Check appropriate Batch Type

Circle, **SS** (single sided) or **DS** (double sided)

Enter initials and date of person who performed the Batching, Scanning, and QC

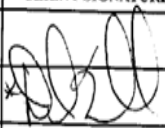
Note, ID and name will fill automatically

Enter Today's date in the **DOS** box (#4 of the screen shot) and click, **Accept** (see [Results](#))

**SCANNED RESULTS**

ONE SECTION: \_\_\_\_\_ SN \_\_\_\_\_ HHA

SuppHM SuppPCH SuppHHA

DAY	MO / DAY / YR	IN	AM	PM	OUT	AM	PM	MILEAGE	Errand Miles	Travel Time	*CLIENT SIGNATURE
SUN	/ /										
MON	10/20/14	1245	✓		3:45	✓		6'12			
TUE	/ /										
WED	/ /										
THU	/ /										
FRI	/ /										
SAT	/ /										

\* I certify that the employee worked the hours indicated above and that the work was performed in a satisfactory manner.

Please check off the services provided each day

DAY	SUN	MON	TUE	WED	THU	FRI	SAT
<b>PERSONAL CARE:</b>							
Bed Bath <input type="checkbox"/> Sponge Bath <input type="checkbox"/> Shower <input type="checkbox"/>							
Skin Care <input type="checkbox"/> Back Rub <input type="checkbox"/>							
Perineal Care <input type="checkbox"/> Catheter Care <input type="checkbox"/>							
Ostomy Care <input type="checkbox"/>							
Hair: Comb <input type="checkbox"/> Shampoo <input type="checkbox"/>							
Mouth Care: Brush Teeth <input type="checkbox"/>							
Dentures <input type="checkbox"/>							

Document Class: [WKTHCI: [WORKTICKET HCI] Date: 10/31/2014 Time: 10:50 AM #Images: 2 Remember Keys

Keys: DO NOT USE: APSCANNER2201410311043 PATIENT ID#: 19158102 LAST NAME, F...: Quarrell, David ID: 104828041

DOS: 10/25/2014 5: \_\_\_\_\_ 6: \_\_\_\_\_ Page: 1 of 2

Buttons: Save, Accept, Undo

**Repeat above step for every scanned page**

Click, **OK** to the prompt 'No More Images'

Select, **Transfer** from top menu bar

Select, **Review/Edit Document**

The list of scanned documents will print to the screen

Check this list against paperwork

If all ok, close the screen

Select, **Transfer** from top menu bar

Select, **Transfer Scans**, click, **Yes**

Put batch cover sheet with scanned documents and put in boxes to file



4.1 **BATCH COVER SHEET example:**

BATCH # \_\_\_\_\_

BATCH TYPE:

485/487 \_\_\_\_\_

NOA \_\_\_\_\_

HCI Work Tickets \_\_\_\_\_

Hospital Referrals \_\_\_\_\_

Miscellaneous \_\_\_\_\_

**SS**

**DS**

*Please initial and date when each of the following steps have been completed:*

BATCHED \_\_\_\_\_

SCANNED \_\_\_\_\_

QC \_\_\_\_\_

## 5. Preparation of other documents for scanning to Mesa

Other Documents include Face-To-Face, NOA (Notice of Acceptance), 485's/Interim Orders, Work-Tickets, Home Health Change of Care, Advanced Beneficiary Notice, Notice of Medicare Non-coverage (green or yellow), MD Orders, Money Handling, Grocery Shopping, Telehealth and miscellaneous.

Each document type is located in a designated bin in Medical Records

Sort documents by type

**(MD Orders, NOA and Work-Tickets are priority documents for scanning)**

Select approximately 100 or less of one type of document to prepare

Remove staples, paper clips and any loose notes attached to the document

Unfold any dog eared documents; smooth creased documents; tape any tears

Assure each page includes the patient name, patient ID, date and form name

### 5.1 Face-To-Face

No labels required

Write date at top or circle printed date

Write MRN or circle printed MRN in top right corner

Single sided

### 5.2 NOA

Bar code is on bottom left, if not put NOA label

Put ID label on top left, write date at top

Single sided

### 5.3 485's/Interim orders

No labels required

Write date at top or circle printed date

Write MRN or circle printed MRN in top right corner

Single sided

#### **5.4 Work-Tickets**

Put WKTVNA label over existing label in bottom left corner

Put ID label or Write MRN on top left

Double sided

#### **5.5 Home Health Change of Care**

Put HHABN label on bottom left

Put ID label on top left

Write date on top or circle printed date

Single sided

#### **5.6 Advanced Beneficiary Notice**

Put HHABN label on bottom left

Put ID label on top left

Write date on top or circle printed date

Single sided

#### **5.7 Notice of Medicare Non-Coverage (green or yellow)**

Put MEDNC label on bottom left

Put ID label on top left

Write date on top or circle printed date

Double sided

#### **5.8 MD Orders**

Put DRORD label on bottom left

Put ID label on top left

Single sided

#### **5.9 Money Handling, Grocery Shopping, Telehealth**

No labels required

Write today's date on top

Single sided

## 6. Scanning other documents to MESA – Single/Double Sided forms

Remove staples, paper clips and any loose notes from a group of other documents described above

Place them in the bottom tray of scanner, right side up and label at top

Open '**Scanning Workstation**' on desktop

Select, **Scan** top left menu bar

Select, **Batch** from drop down menu

Select, **TestSS** or **TestDS** depending on the properties of the form being scanned

Select, **OK**

Enter Batch Number, (batch number can be any number per user, use the same number)

Forms with a label, check **Document Grouping**

Forms without a label, uncheck **Document Grouping**

Select, **OK**

Scanner starts, wait to finish

Select, **Options**

Select, **Identify Now**

All the scans print to the screen

Enter Batch # from the '**Do Not Use**' box (bottom left of the screen shot, see [Results](#)) on the [batch cover sheet](#). It will consist of the printer number, date and time, i.e. 1102820140830

Check appropriate Batch Type

Circle, **SS** (single sided) or **DS** (double sided)

Enter initials and date of person who performed the Batching, Scanning, and QC

For forms without labels, enter ID, Last name, First name and signature date manually

Enter today's date in the **DOS** box (#4 of the screen shot, see [Results](#)) and click, **Accept**

**Repeat above step for every scanned page**

Click, **OK** to the prompt 'No More Images'

Select, **Transfer** from top menu bar

Select, **Review/Edit Document**

The list of scanned documents will print to the screen

Check this list against paperwork

## 7. Printing 485/Interim Orders

Login to OfficeWyse

Select **Management Tools**

Teams – check **ALL**, Clinicians – check **ALL**, Forms – Check **485/Interim to Send (ALL)**

Click **Search**

Sort by Physician, ascending order

Click **Print Review** (Send list to printer)

Click **Print All 485's** (Send forms to printer)

Click **YES, OK** to questions

When done printing, resort list by Physician, ascending order

Click **Print ALL Interims** (Send forms to printer)

Click **Yes, OK** to questions

List should be cleared out, if any orders remain, repeat process for the type of order remaining until list is clear

Medical Records

Scheduling

Management Tools

No Connection Allowed

Logoff

Admin

You've Got Mail / Records

Financial

Exit

Change Site

Current Site: Back Office  
Last connection on 10/24/14 1:34p

Logon: Ronsivalli, Alice

OW.NET 18.82

**Teams**

Office Staff  
 Weekend

Clear All

**Clinicians**

Albert, John  
 Aleksa, Janice M  
 Allors, Laurene  
 Allors, Robert  
 Almonte, Virginia  
 Anderson, Judy

Clear All

**Forms**

485/Int Details Unsigned  
 Missing 485  
 485/Interim To Review  
 485/Interim To Send (All)  
 485/Interim to Rec(All)  
 F2F to Rec(All)

Clear All

Change My List

Search

Go to Form

Print Review

Print All 485's

Print All Interim's

Print Schedule

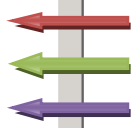
Print All Schedules

Print Report

Output Report

**To Be Reviewed**

Date	Physician	Clinician	Form	Reason	Patient
10/17/2014	Aziz Sultan, ...	Smalley, Melissa	485	Send - Medicare	7721112 Callahan, C
10/19/2014	Aziz Sultan, ...	Smalley, Melissa	485	Send - Medicare	7721112 Callahan, C
10/21/2014	Aziz Sultan, ...	Smalley, Melissa	485	Send - Medicare	7721112 Callahan, C
10/22/2014	Aziz Sultan, ...	Smalley, Melissa	485	Send - Medicare	7721112 Callahan, C
10/23/2014	Aziz Sultan, ...	Smalley, Melissa	485	Send - Medicare	7721112 Callahan, C
10/23/2014	Aziz Sultan, ...	Smalley, Melissa	485	Send - Medicare	7721112 Callahan, C
10/17/2014	Beaudoin, S...	Gingras, Ashley	Interim Order	Send - Medicare	62396 Dube, Norma
10/19/2014	Beaudoin, S...	Gingras, Ashley	Interim Order	Send - Medicare	62398 Dube, Norma
10/17/2014	Bickley, Barry	Perryman, Ann	485	Send - Neighborhood ...	7805112 Kalaydjian, J
10/17/2014	Bickley, Barry	Perryman, Ann	485	Send - Neighborhood ...	7805112 Kalaydjian, J
10/24/2014	Bickley, Barry	Perryman, Ann	485	Send - Neighborhood ...	7805112 Kalaydjian, J
10/20/2014	Borges, Law...	Alcombright, Heather	Interim Order	Send - Medicare	7715112 Berger, Rich
10/17/2014	Colnes, Jeff...	Mallory, Michelle	Interim Order	Send - Medicare	8300113 Miller, Bob
10/23/2014	Colnes, Jeff...	Mallory, Michelle	Interim Order	Send - Medicare	8300113 Miller, Bob
06/24/2014	Costagliola, ...	Northam, Cheryl	Interim Order	Send - Medicare	4577112 Welch, John
10/19/2014	Costagliola, ...	Northam, Cheryl	485	Send - Medicare	1323094 Higgit, Joar
10/23/2014	Costagliola, ...	Northam, Cheryl	485	Send - Medicare	1323094 Higgit, Joar
10/24/2014	Crisibello, ...	Hurley, Lori E.	485	Send - Medicare	7472112 Cordina, Sa
10/20/2014	Fagan, Maura	Aaron, Haley	485	Send - Medicare	7746112 Brown, Edw.
10/20/2014	Fagan, Maura	Aaron, Haley	485	Send - Medicare	7746112 Brown, Edw.
10/22/2014	Fagan, Maura	Aaron, Haley	485	Send - Medicare	7746112 Brown, Edw.
10/24/2014	Fagan, Maura	Aaron, Haley	485	Send - Medicare	7746112 Brown, Edw.
10/18/2014	Glazier, Ken...	Yeo, Ann	485	Send - Medicare	9728113 Ohandley, G
10/19/2014	Glazier, Ken...	Yeo, Ann	485	Send - Medicare	9728113 Ohandley, G
10/09/2014	Gravel, Jos...	Giklich, Tasha	Interim Order	Send - United Healthc...	9478102 Garcia, Mari
10/22/2014	Gravel, Jos...	Giklich, Tasha	485	Send - United Healthc...	9478102 Garcia, Mari
10/24/2014	Gravel, Jos...	Giklich, Tasha	485	Send - United Healthc...	9478102 Garcia, Mari
10/17/2014	Hurchik, John	Proposki, Melissa L.	485	Send - Medicare	7700112 Prettyman, I
10/24/2014	Hurchik, John	Proposki, Melissa L.	485	Send - Medicare	7700112 Prettyman, I



## 8. Receiving signed 485/Interim Orders

Login to OfficeWyse

Select **Management Tools**

Teams – check **ALL**, Clinicians – check **ALL**, Forms – check **485/Interim to Rec (ALL)**

Click **Search**

Sort by Patient

The screenshot shows the '485 ToDo List' interface. It features three filter panels: 'Teams' with 'Office Staff' and 'Weekend' selected; 'Clinician' with a list of names including Albert, John, Aleksa, Janice M, Allore, Laurene, Allore, Robert, Almonite, Virginia, Anderson, Judy, and Aylward, Lisa; and 'Forms' with '485/Interim to Rec(All)' selected. A 'Search' button is located to the right of these panels. Below the filters is an 'Information Review' table with columns for Date, Physician, Clinician, Form, Reason, and Patient. The table contains several rows of data, including dates from 10/11/2014 to 01/14/2014, various physician and clinician names, and form types like 'Interim Order' and '485'. At the bottom of the interface are buttons for '485 Log', 'Records', 'Done', 'Go to Form', 'Print Review', and 'Activity Schedule'.

Date	Physician	Clinician	Form	Reason	Patient
10/11/2014		Northam , Cheryl	Interim Order	Sent 10/15 @ 12:10 PM	Constable, Cheryl
10/11/2014	Silverman, ...	Northam , Cheryl	Interim Order	Sent 10/15 @ 12:32 PM	Constable, Cheryl
10/11/2014	Silverman, ...	Northam , Cheryl	485	Sent 10/15 @ 12:49 PM	Constable, Cheryl
08/19/2014	Benetti, Ri...	Dinning, Nicole	Interim Order	Sent 10/13 @ 05:15 PM	Conb, Frank
09/18/2014	Mains, David	Yogler, Michael	485	Sent 10/08 @ 05:34 PM	Conway, William
10/09/2014	Epstein, D...	Guisti, Cecilia	485	Sent 10/17 @ 12:09 PM	Cook, Katherine
08/23/2014	Tarsy, Daniel	Proposki, Melissa L.	485	Sent 10/08 @ 05:35 PM	Cooper, Dennis
01/14/2014	Wieder, St...	Kalpokis, Brenda L.	485	Sent 10/08 @ 05:35 PM	Coorey, Nicholas

Check form for doctor signature, whose name is under Signature line, and dated

If a different doctor signed the form then:

Make sure the doctor name under signature line is crossed out

Make sure doctor name, who actually signed form, is printed next to it

**Note: Do not accept stamped signature or stamped date**

Double click patient name in receiving list to open record

Check for the correct cert period



Compare the form with the order on the screen to make sure you have the correct order, 485 or interim, (you can reference the sent date/time on bottom of form)

If a doctor's name has to be changed, go to the box labeled, **Physically Signed By** and type in correct name

The screenshot displays a medical software interface with a sidebar on the left containing buttons for Logoff, Admin, You've Got Mail / Records, Financial, Exit, and Change Site. The main content area shows patient information: 1 Water St, Apt 512, Haverhill, MA 01830. Below this is a section for 'Orders for Discipline and Treatments' with a text area containing medical instructions. A table titled 'PPS based on Oasis done on 08/18/2014 (Primary Insurance - Medicare)' is visible, with columns for SN, PT, HCA, Other, To Date Exp, Planned Exp, Total Exp, PPS, and G/(L). The table contains one row of data. Below the table is a 'Display View' section with radio buttons for 'Current 485 Update', '485 Update History', 'SOC/Recert 485', and 'Sent on 10/13 @ 05:15 PM'. The 'Approval' section has two options: 'Verbally approved via phone by:' and 'Physically signed by:'. The 'Physically signed by:' option is selected, with the name 'Benetti, Richard E.' and date '10/24/2014' entered. A green arrow points to this section. The 'Comments' section is empty. At the bottom, there is a 'Logon: Ronsivalli, Alice' and a 'OW.NET 18.62' label. A row of buttons includes 'ToDo List', 'OASIS', 'POC', 'PPS', 'Review Signature', 'Send to Physician', 'Confirm Signature', 'Cancel Send', 'Print', 'Send Mail', and 'Status'.

SN	PT	HCA	Other	To Date Exp	Planned Exp	Total Exp	PPS	G/(L)
\$2,250.00 (77%)	\$0.00 (%)	\$0.00 (%)	\$680.00 (23%)	\$2,930.00 (10...	\$0.00 (%)	\$2,930.00	\$2,349.80	(\$580.20)

Click **Confirm Signature** at bottom, click **Yes** to question regarding doctor signature/date

Click **ToDo List** at bottom to return to list of patients

Date stamp the hardcopy and place in appropriate bin for scanning

If patient name does not exist in the **ToDo List**, lookup patient in Medical Records

Select cert period, 485

Select **485 Update History** in Display View

Scroll down to find order

If order has been **received**, make sure that it is exactly the order in the chart and recycle the duplicate.

Physician's Signature and Date: Jennifer Purdy RN VO Date: 11/01/2013 10:33 AM  
Physician's Signature and Date: Dr Namrata Patel, MD 11/8/2013

**485 Update History** Reviewed Suzanne McAnespie 10/31/2013, Sent 10/31/2013, Received 11/11/2013

**Principal Diagnosis**  
\*Aftercare following surgery of the teeth, oral cavity and digestive system, NEC (V58.75) 10/19/2013 O

**Surgical Procedure**  
\*Bone Marrow Biopsy (41.31) 10/16/2013  
\*Perirectal Excision (48.82) 8/27/2013

**Other Pertinent Diagnoses**  
\*Perirectal abscess (566) 8/27/2013 O  
\*Acute venous embolism and thrombosis of upper extremity, unspecified (453.83) 9/19/2013 E  
\*Leukemia Nos W/O Remission (208.90) 8/27/2013 E  
\*Peripheral T cell lymphoma, unspecified site, extranodal and solid organ sites (202.70) 8/27/2013 E  
\*Long-Term Use Antibiotic (V58.62) 8/27/2013 E

**Orders for Discipline and Treatments**  
SN: 1x/da x 1 da (10/19/2013 to 10/19/2013)  
Clinician's Signature and Date: Suzanne McAnespie RN VO Date 10/31/2013 01:45 PM

FPS based on Oasis done on 10/19/2013 (Primary Insurance - Network Health)

SN	PT	HCA	Other	To Date Exp	Planned Exp	Total Exp	FPS	G/(L)
\$1,650.00 (10...	\$0.00 (%)	\$0.00 (%)	\$0.00 (%)	\$1,650.00 (10...	\$0.00 (%)	\$1,650.00	\$0.00	(\$1,650.00)

Display View  
 Current 485 Update  485 Update History  SOC/Recent 485  Sent on

Assign Visits | Dr./ Meds | Notes / Calllog