

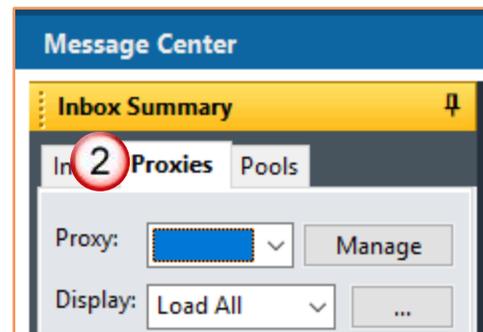
HIM ROLES

HIM- Refusals (Cosign orders)

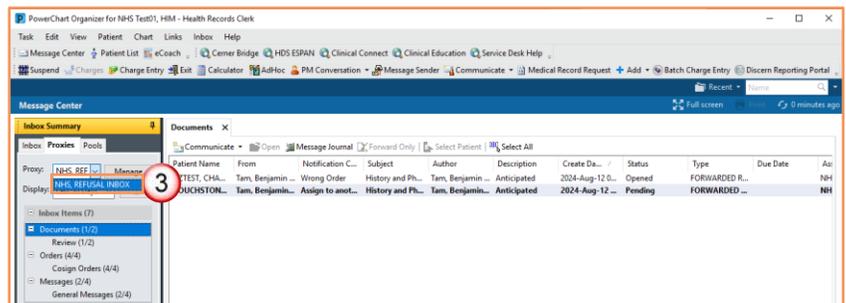
1. Log into **PowerChart** from the **AppBar**.



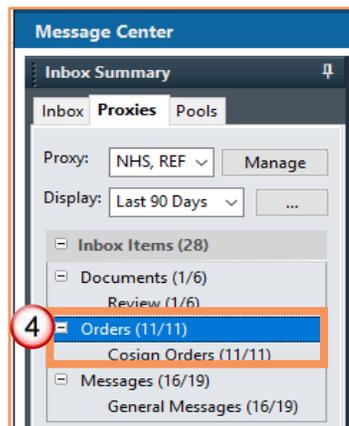
2. From the message Center, click the **Proxies** tab.



3. Select the **Refusal Inbox** from the **Proxies drop-down menu**.



4. Select the **Orders** folder and **Co-sign orders**.





HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

- Double-click on the **Order**.

Patient Name	Order/Plan Na...	Details	Order Comment	Originator Na...	Create Da...	Notification C...	Stop Date	Stop Type	Update Date	Sta
ZZINA, WSC...	morphine	100 mg IV IN...		NHS Test05, N...	2024-May-17 ...	Wrong Order ...	2024-Apr-29 0...	Physician Stop	2024-May-17 ...	Per
SYSTEMEST...	Crossmatch	Blood, Routine...		SYSTEM SYST...	2024-May-22 ...	Wrong Order ...	2024-Apr-15 1...	Physician Stop	2024-May-22 ...	Per
SYSTEMEST...	Consult to CCR...	Routine, TEST...		NHS Test04, Nu...	2024-May-27 1...	Wrong Order ...	2024-May-27 1...	Physician Stop	2024-May-27 1...	Op
SYSTEMEST...	Consult to ACU...	Routine, test...		NHS Test04, N...	2024-May-27 ...	Wrong Patient...	2024-May-27 ...	Physician Stop	2024-May-27 ...	Per
ZZTEST, INI ICU	HYDRMorph...	2 mg = 1 mL L...		NHS Test06, N...	2024-May-29 ...	Wrong C...	2024-May-18 ...	Physician Stop	2024-May-29 ...	Per
SYSTEMEST...	Consult to Car...	Routine, TEST...		NHS Test04, N...	2024-May-27 ...	Wrong C...	2024-May-18 ...	Physician Stop	2024-May-27 ...	Per
SYSTEMEST...	acetaminoph...	2 tablet(s), PO...	Maximum ace...	NHS Test04, N...	2024-Jun-28 1...	Assign to		Physician Stop	2024-Jun-28 1...	Per
ZZONC, DON...	Form 1	Expiry date: 07...		CERNER, SECU...	2024-Aug-09 ...	Other (S...		Physician Stop	2024-Aug-09 ...	Per
ITTW, ACUT...	sodium chlorid...	Total Volume L...	TKVO pre-op...	NHS Test01, P...	2024-Aug-09 ...	Wrong C...		Physician Stop	2024-Aug-09 ...	Per
ITTW, ACUT...	cefazolin	Prophylaxis, O...	30 minutes pri...	NHS Test01, P...	2024-Aug-09 ...	Wrong C...		Physician Stop	2024-Aug-09 ...	Per

- Click on the **History** tab and review the **Cosignatories** section to see the **refusal reason** and any **comments**.

Discontinue 27/May/2024 11:43 EDT

Order 27/May/2024 10:45 EDT

Status

After	Before
Order Status	Discontinued
Department Status	Discontinued

Order 27/May/2024 10:45 EDT

Entered and electronically signed by NHS Test01, Nurse. Phone with Read Back (Cosign) order by NHS Test01, Physician - Hospitalist

Status

Order Status	Ordered
Department Status	Ordered

Details

Requested Start Date/Time: 27/May/2024 10:44 EDT

Priority: Routine

Consult Reason: TEST

Unit Clerk to Call Consulting Service: Yes

Step Date/Time: 27/May/2024 10:44 EDT

Validations

Cosignature

Routed to NHS Test01, Physician - Hospitalist
 Refused by NHS Test01, Physician - Hospitalist on 27/May/2024 at 10:49 EDT
 Refusal Reason: Wrong Order

- If you click on the patient **FIN admit date** you will have this window pop up **with patient's nurse unit and room**.

Custom Information: SYSTEMEST, PHYSTRACKFOUR

Visit Type	Location	Admit Date	Discharge Date	FIN	Case No.	Visit Reason
Inpatient	PC NPC PCN116 B	17/Mar/2024 16:23:50	07/Jun/2024 10:54:00	22-001409	Complex Continuing Care	DIABETES MELLITUS TYPE 2

GENERAL INFORMATION

Full Name:	SYSTEMEST, PHYSTRACKFOUR	EMC:	BRYANT, JILLIAN
Reg Date/Time:	17/Mar/2024 16:23:50	EMC Phone:	(748)784-5687
D.O.S.:	B1 B	Fin Number:	22-001409
Nurse Unit:	PC NPC		
Room:	PCN116		

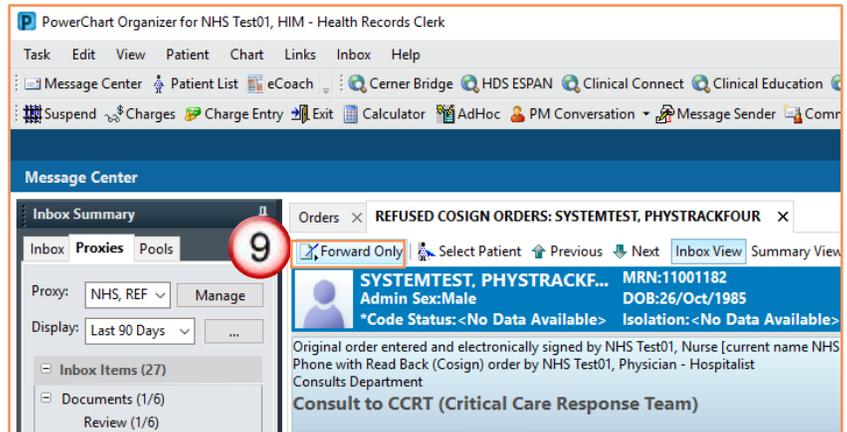
Note: Determine If the order was a PAO patient admission order or outpatient in a bed.
We need this to validate subsequent orders on the patient's chart

HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

8. Contact the Nurse Manager using email (NH) or the telephone.
9. Select **forward only**.

Note: Please mention the reason in the comments section (**DO NOT SKIP**)



10. Forward the order to the **Prescriber** for signature and click **OK**.



Note: The prescriber will then review the refused order.

11. If the order was the correct encounter or patient, and refused mistakenly send the order to the medical lead and department chief. **Follow steps 9 and 10 above and select the appropriate medical lead.**



HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

HIM- REFUSALS (COSIGN ORDERS – WRONG PATIENT/ENCOUNTER

Providers can refuse orders requiring co-signature, which then gets routed to the refusal inbox. The HIM department is responsible for monitoring the refused inbox daily.

Check if the order is a Patient Admission Order (PAO). Check if an active PAO is already on the encounter that has not been refused. Distinguish if the refused order is the same as the active PAO.

Contact the Nurse Manager via telephone or email.

Note: Unaddressed refused orders can lead to patient safety risks and incomplete medical records.

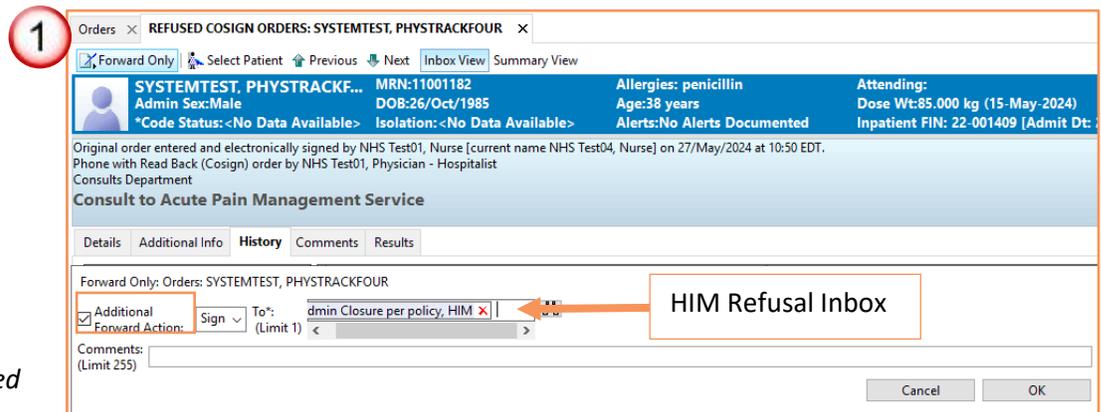
HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

HIM- REFUSALS (ANTICIPATED DOCUMENTS)

1. If the prescriber refuses the document, the prescriber selects the **“Additional Forward Action”** and Sign from dropdown then selects **“HIM Refusal Inbox”** in the **“To”** box,

1



Orders × REFUSED COSIGN ORDERS: SYSTEMTEST, PHYSTRACKFOUR ×

Forward Only Select Patient Previous Next Inbox View Summary View

SYSTEMTEST, PHYSTRACKF... MRN:11001182 Allergies: penicillin Attending:
Admin Sex:Male DOB:26/Oct/1985 Age:38 years Dose Wt:85.000 kg (15-May-2024)
*Code Status:<No Data Available> Isolation:<No Data Available> Alerts:No Alerts Documented Inpatient FIN: 22-001409 [Admit Dt: ...]

Original order entered and electronically signed by NHS Test01, Nurse [current name NHS Test04, Nurse] on 27/May/2024 at 10:50 EDT.
Phone with Read Back (Cosign) order by NHS Test01, Physician - Hospitalist
Consults Department

Consult to Acute Pain Management Service

Details Additional Info **History** Comments Results

Forward Only: Orders: SYSTEMTEST, PHYSTRACKFOUR

Additional Forward Action: Sign To: Admin Closure per policy, HIM × **HIM Refusal Inbox**

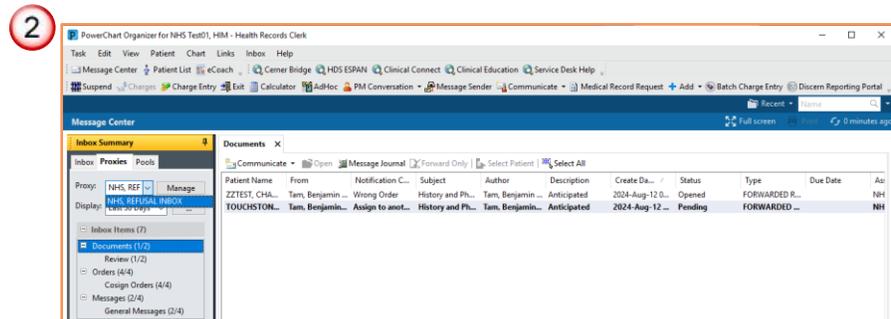
Comments: (Limit 255)

Cancel OK

Note: The refused document is removed from the provider’s Message Center.

2. The deficiency is re-directed to the HIM Refusal Inbox.

2



PowerChart Organizer for NHS Test01, HIM - Health Records Clerk

Task Edit View Patient Chart Links Inbox Help

Message Center Patient List eCoach Corner Bridge HDS ESPAN Clinical Connect Clinical Education Service Desk Help

Suspend Charges Charge Entry Exit Calculator AdHoc PM Conversation Message Sender Communicate Medical Record Request Add Batch Charge Entry Discern Reporting Portal

Message Center Recent 0 minutes ago

Inbox Summary Documents ×

Inbox Proxies Pools

Proxy: NHS, REF Manage

Display: NHS, REFUSAL INBOX

Inbox Items (7)

Documents (1/2)

Review (1/2)

Orders (6/4)

Cosign Orders (4/4)

Messages (2/4)

General Messages (2/4)

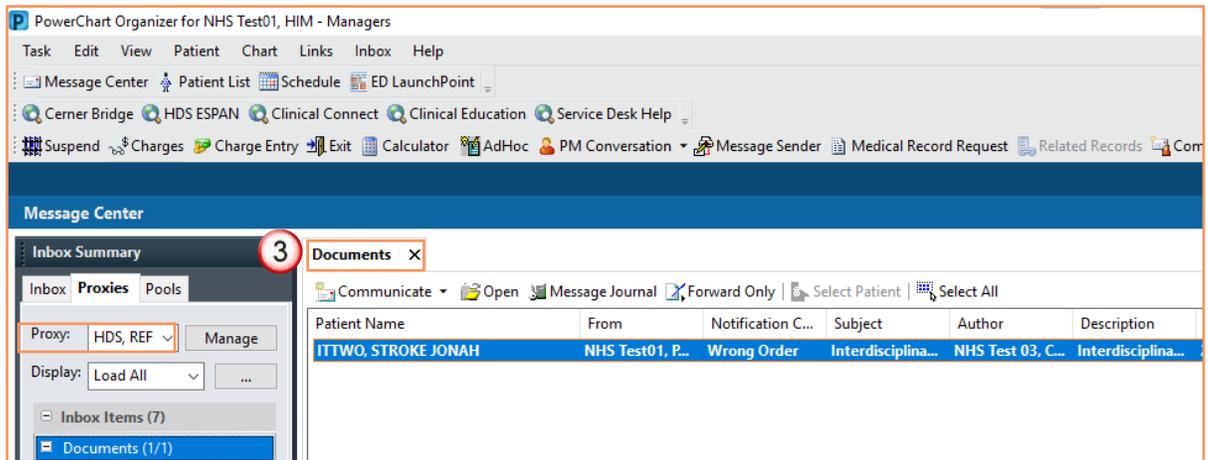
Patient Name	From	Notification C...	Subject	Author	Description	Create Da...	Status	Type	Due Date	As
ZZTEST, CHA...	Tam, Benjamin...	Wrong Order	History and Ph...	Tam, Benjamin...	Anticipated	2024-Aug-12 0...	Opened	FORWARDED R...		NH
TOUCHSTON...	Tam, Benjamin...	Assign to asst...	History and Ph...	Tam, Benjamin...	Anticipated	2024-Aug-12 ...	Pending	FORWARDED ...		NH

Note: The refused document is then removed from the provider’s message center, not a step.

HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

- The document appears in the "**HIM, Refusal Inbox**" Message Center > **Documents to Sign** folder.



PowerChart Organizer for NHS Test01, HIM - Managers

Task Edit View Patient Chart Links Inbox Help

Message Center Patient List Schedule ED LaunchPoint

Center Bridge HDS ESPAN Clinical Connect Clinical Education Service Desk Help

Suspend Charges Charge Entry Exit Calculator AdHoc PM Conversation Message Sender Medical Record Request Related Records Com

Message Center

Inbox Summary 3 **Documents** X

Inbox Proxies Pools

Proxy: HDS, REF Manage

Display: Load All ...

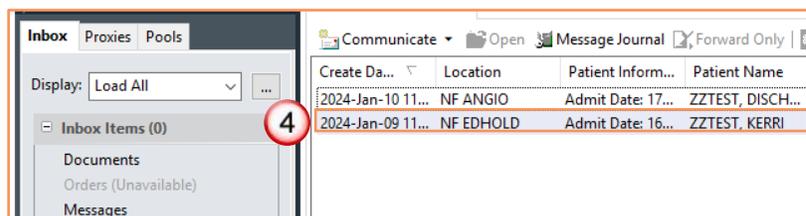
Inbox Items (7)

Documents (1/1)

Communicate Open Message Journal Forward Only Select Patient Select All

Patient Name	From	Notification C...	Subject	Author	Description
ITTWO, STROKE JONAH	NHS Test01, P...	Wrong Order	Interdisciplina...	NHS Test 03, C...	Interdisciplina...

- The deficiency is displayed in the **Refusal inbox**, we need to validate it from the **PowerChart** and reporting portal.



Inbox Proxies Pools

Display: Load All ...

Inbox Items (0)

Documents

Orders (Unavailable)

Messages

4

Communicate Open Message Journal Forward Only

Create Da...	Location	Patient Inform...	Patient Name
2024-Jan-10 11...	NF ANGIO	Admit Date: 17...	ZZTEST, DISCH...
2024-Jan-09 11...	NF EDHOLD	Admit Date: 16...	ZZTEST, KERRI



HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

HIM- REFUSALS (ANTICIPATED CONT'D) RUN DECERN REPORTS DAILY

1. Run a Refuse to Sign report daily from the Discern Reporting Portal.

1

The screenshot shows the Reporting Portal interface. On the left, under 'Filters', the 'Categories' section has 'HIM (35/35)' selected. The main area displays a table of reports:

Report Name	Categories
Patient Request Tracking Summary	HIM
Request Hold Detail	HIM
Request Hold Summary	HIM
Requests Received	HIM
ROI Accounts Receivable	HIM
ROI Cash Receipts	HIM
ROI Requester Profiles	HIM
ROI Summary	HIM

2. Review each row on the Refuse to Sign report and any **order deficiencies contained in the refusal report.**

The screenshot shows the details for the 'HIM Refuse to Sign Report'. A callout box labeled 'Refusals to sign Report' points to the report name. The 'Run' button is circled with a '2' and a mouse cursor is pointing at it.

Report Name: HIM Refuse to Sign Report

Description: No description available.

Path: Published / HIM

Refused Orders Report (Ambulatory)

Refused Orders Report (Explorer Menu (Main Menu))

Report Details:

- Suggested Report User:** No suggested user.
- Suggested Report Frequency:** No suggested frequency.
- Support Reference Number:** 468440.0
- Reporting Application:** CCL
- Alternate name:** RCA_HIM_OPS_REFUSE_TO_SIGN:DBA

Buttons: Run, Run in Background, View Documents

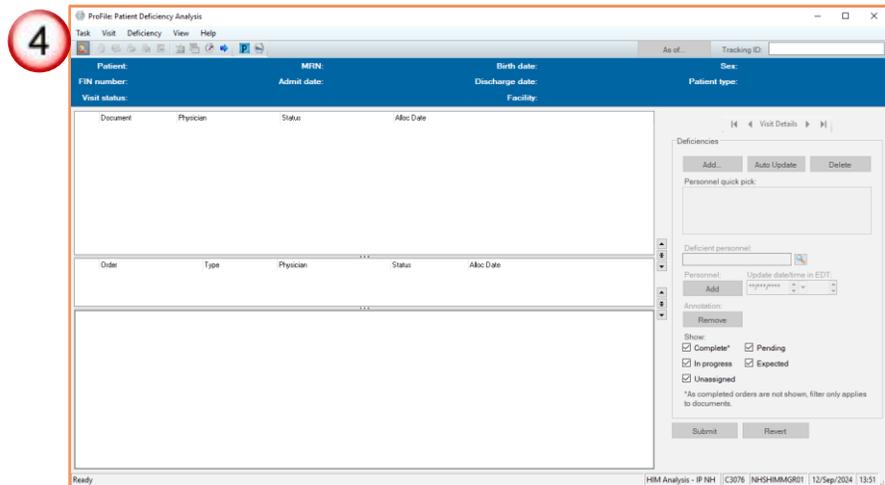
HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

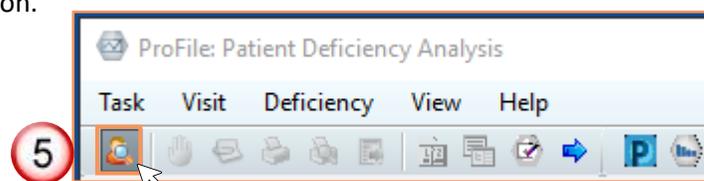
3. Log into the AppBar



4. Open the Patient deficiency analysis app 



5. Click on the **Find Patient** Icon.



HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

6. Patient Search window will open. Enter **Health Card Number, Name, MRN, DOB** etc.

6

Patient Search

Health Card Number:

Last Name:

First Name:

MRN:

Birth Date (DD-MM-YYYY):

Sex:

FIN:

Phone Number:

Deceased?:

Search Reset

No persons found.

No encounters found.

OK Cancel Preview All Encounters

Note: Window HIM Refusals to sign window opens.

7. Locate the **refused** document.

7

Reporting Portal HIM Refusals to Sign Report

Physician Refuse To Sign

Facility: St. Catharines Site Run Date/Time: 09/26/24 05:00 pm

Number of Days: 100

Facility	Physician	Patient name	MRN	Encounter	Order/Document Type	Order/Document Status	Refused Date Time
St. Catharines Site	Cemer Test, Physician - SPETEST, FIVE Hospit	Reason: Assign to another MD	11001887	22-003004	ECG by Nursing CV	Ordered	09/07/24 08:34 EDT
St. Catharines Site	NHS Test01, Physician - Genera	ITTWO, ACUTE KIDNEY Reason: Assign to another MD	11053086	22-003920	Peripheral IV Insertion	Discontinued	09/08/24 12:03 EDT
St. Catharines Site	NHS Test01, Physician - Genera	ITTWO, ACUTE KIDNEY Reason: Wrong Order	11053086	22-003920	ceFAZolin	Discontinued	09/08/24 11:54 EDT
St. Catharines Site	NHS Test01, Physician - Genera	ITTWO, ACUTE KIDNEY Reason: Wrong Order	11053086	22-003920	sodium chloride 0.9% intrave	Discontinued	09/08/24 11:54 EDT
St. Catharines Site	NHS Test01, Physician - Intern	ZZONC, DONNA Reason: Other (See Comments)	11000342	22-000408	Form 1	Completed	09/08/24 11:48 EDT
St. Catharines Site	Tam, Benjamin Ho-Lai	TOUCHSTONE, GENLAB Reason: Assign to another MD	11002924	22-003381	History and Physical	Active	12/08/24 09:59 EDT
St. Catharines Site	Tam, Benjamin Ho-Lai	ZZTEST, CHANTALLE Reason: Wrong Order	11000133	22-003384	History and Physical	Active	12/08/24 09:59 EDT
St. Catharines Site	Tam, Benjamin Ho-Lai	TOUCHSTONE, MICRO Reason: Assign to another MD	11002928	22-003389	History and Physical	Active	12/08/24 09:59 EDT
St. Catharines Site	Tam, Benjamin Ho-Lai	CSWORKLOAD, BLOODBANK	11053224	22-004055	History and Physical	Active	12/08/24 00:50 EDT

Page 11, Facsctime.html: 6.758 | C3076



HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

8. Enter Encounter Number listed on the Refuse to Sign Report.

MRN	Patient Name	Health Card Number	VC	Sex	Birth Date (DD-MMM-YYYY)	Age	Deceased?
11000302	ZZTEST, GEM	1010-101-293		Male	01/Jan/1950	74 Years	No

Facility	MRN	FIN	Visit Id	Patient Type	Reg Date (DD-MMM-YYYY)	Expected Date of Arrival	Disch Date (DD-MMM-YYYY)
SCS	11000302	22-000493	22-000482	Inpatient	2023-Oct-24 07:29		2024-May-30 11:25

Note: Open PowerChart and review the patient document (If necessary).

9. All documents show in the patient deficiency app for this patient.

Document	Physician	Status	Alloc Date
ED Note Physician - 25/Jan/2024 12:02	NHS Test01, Physician - Emergency Medicine	In Progress	
ED Note Physician - 25/Jan/2024 12:00	Cerner Test, Physician - Emergency Medicine	Auth (Verified)	
ED Note Physician - 04/Apr/2024 11:05	NHS Test01, Physician - Emergency Medicine	Complete	
Discharge Summary - 30/May/2024 11:26	Cerner Test, Physician - Cardiovascular Cerner	Anticipated	30/May/2024

*** Preliminary Report ***

Primary Diagnosis
Ankle injury

Current Presentation
Review of Systems

Problem List/Past Medical History
Ongoing
No qualifying data
Historical
No qualifying data



HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

10. In the Patient Deficiency Analysis, highlight the document.

ProFile: Patient Deficiency Analysis

Task Visit Deficiency View Help

Patient: ZZTEST, GEM MRN: 11000302 Birth date: 1950-Jan-01
 FIN number: 22-000493 Admit date: 2023-Oct-24 Discharge date: 2024-May-30
 Visit status: Facility: St. Catharines Site

Document	Physician	Status	Alloc Date
ED Note Physician - 25/Jan/2024 12:02	Physician	In Progress	
ED Note Physician - 25/Jan/2024 12:00	NHS Test01, Physician - Emergency Medicine	Expected Sign	
ED Note Physician - 04/Apr/2024 11:05	Cerner Test, Physician - Emergency Medicine Cerner	Auth (Verified)	
ED Note Physician - 04/Apr/2024 11:05	NHS Test01, Physician - Emergency Medicine	Complete	
Discharge Summary - 30/May/2024 11:26	Cerner Test, Physician - Cardiovascular Cerner	Anticipated	30/May/2024

Order
 acetaminophen/caffeine/codeine - 23/Nov/2023 15:11
 Order

11. Select Delete.

ProFile: Patient Deficiency Analysis

Task Visit Deficiency View Help

Patient: ZZTEST, GEM MRN: 11000302 Birth date: 1950-Jan-01 Sex: Male
 FIN number: 22-000493 Admit date: 2023-Oct-24 Discharge date: 2024-May-30 Patient type: Inpatient
 Visit status: Facility: St. Catharines Site

Document	Physician	Status	Alloc Date
ED Note Physician - 25/Jan/2024 12:02	Physician	In Progress	
ED Note Physician - 25/Jan/2024 12:00	NHS Test01, Physician - Emergency Medicine	Expected Sign	
ED Note Physician - 04/Apr/2024 11:05	Cerner Test, Physician - Emergency Medicine Cerner	Auth (Verified)	
ED Note Physician - 04/Apr/2024 11:05	NHS Test01, Physician - Emergency Medicine	Complete	
Discharge Summary - 30/May/2024 11:26	Cerner Test, Physician - Cardiovascular Cerner	Anticipated	30/May/2024

Deficiencies

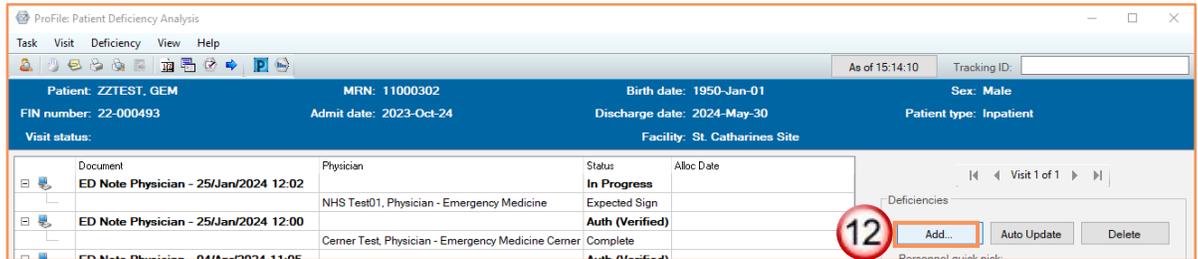
Add... Auto L 11 Delete

Personnel quick pick:
 Agnoletto, Laura | Personal Support Worker
 Cerner Test, Nurse Practitioner Cerner | Nurse Practitioner
 Cerner Test, Physician - Cardiovascular Cerner | Adm
 Cerner Test, Physician - Emergency Medicine Cerner
 Cooke, Rachael | Nurse

HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

12. To add a new deficiency document, click **Add**.



ProFile: Patient Deficiency Analysis

Task Visit Deficiency View Help

As of 15:14:10 Tracking ID: []

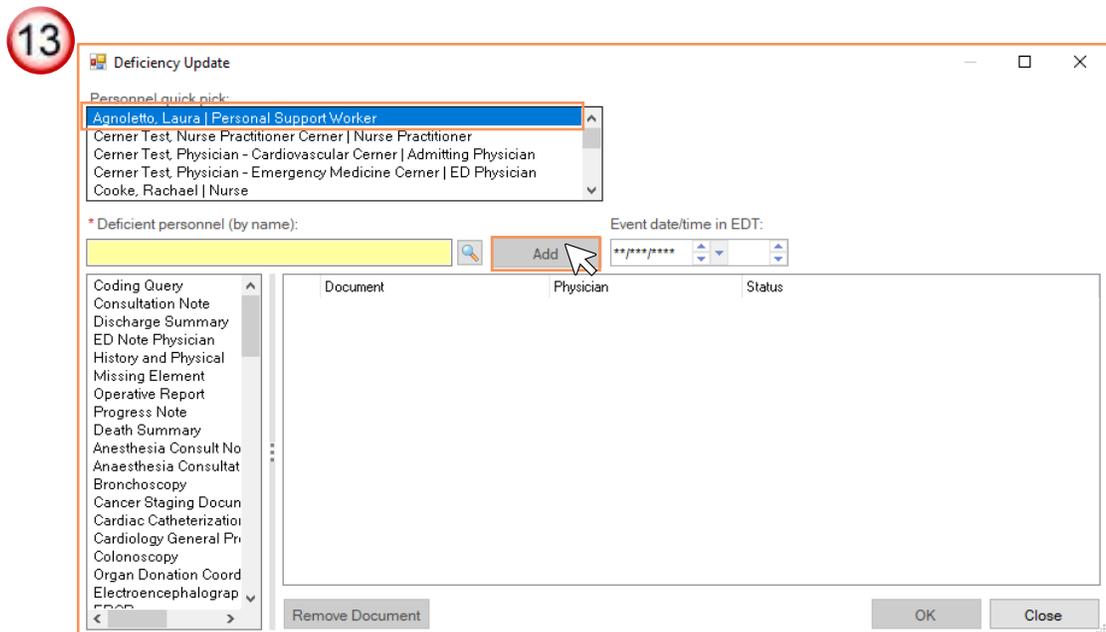
Patient: ZZTEST, GEM MRN: 11000302 Birth date: 1950-Jan-01 Sex: Male
 FIN number: 22-000493 Admit date: 2023-Oct-24 Discharge date: 2024-May-30 Patient type: Inpatient
 Visit status: Facility: St. Catharines Site

Document	Physician	Status	Alloc Date
ED Note Physician - 25/Jan/2024 12:02		In Progress	
ED Note Physician - 25/Jan/2024 12:00	NHS Test01, Physician - Emergency Medicine	Expected Sign	
ED Note Physician - 24/Jan/2024 11:05	Cerner Test, Physician - Emergency Medicine Cerner	Auth (Verified)	
		Complete	

Deficiencies [| < Visit 1 of 1 > |]

Personnel quick pick: [Add...] [Auto Update] [Delete]

13. Deficiency Update window opens. Select a **provider** from the **Quick pick or Provider Selection Tool** and Click **Add**.



Deficiency Update

Personnel quick pick:

- Agnoletto, Laura | Personal Support Worker
- Cerner Test, Nurse Practitioner Cerner | Nurse Practitioner
- Cerner Test, Physician - Cardiovascular Cerner | Admitting Physician
- Cerner Test, Physician - Emergency Medicine Cerner | ED Physician
- Cooke, Rachael | Nurse

* Deficient personnel (by name): [] [Add]

Event date/time in EDT: [] [] [] [] [] []

Coding Query
 Consultation Note
 Discharge Summary
 ED Note Physician
 History and Physical
 Missing Element
 Operative Report
 Progress Note
 Death Summary
 Anesthesia Consult No
 Anaesthesia Consultat
 Bronchoscopy
 Cancer Staging Docun
 Cardiac Catheterizatio
 Cardiology General Pr
 Colonoscopy
 Organ Donation Coord
 Electroencephalgrap
 ECG

Document	Physician	Status
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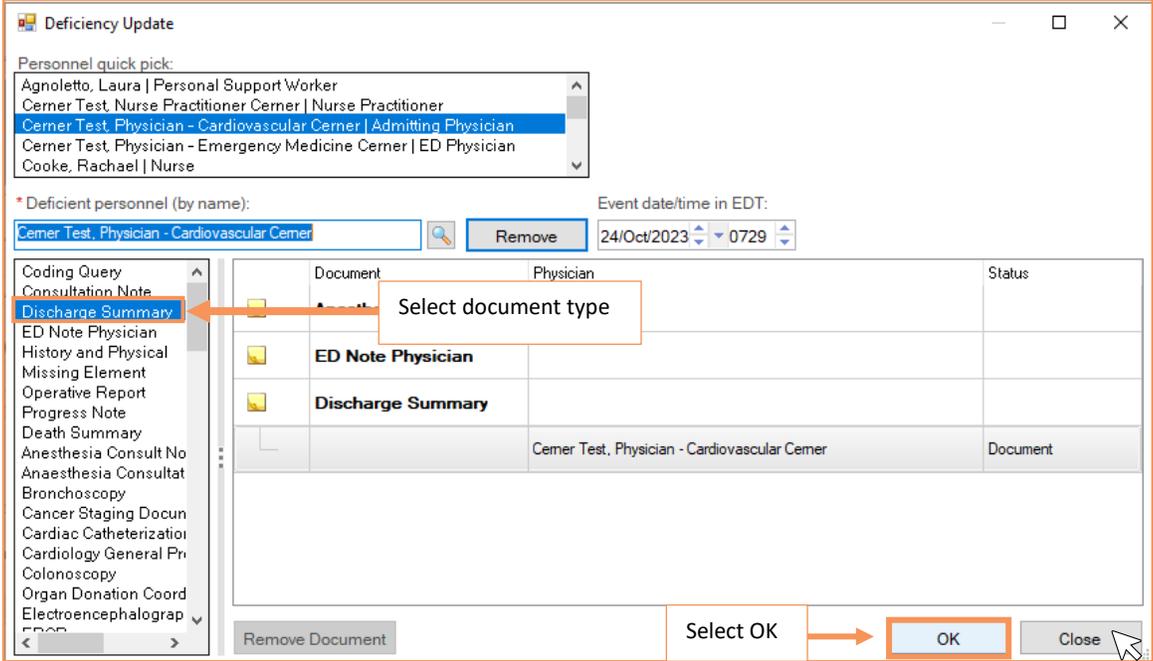
Remove Document [] [OK] [Close]

HANDLING REFUSALS (CO-SIGN ORDERS & ANTICIPATED DOCUMENTS) TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

14. Select the **document type** and ensure deficiency status defaults to document. Then Click **Ok** and **close**.

14



Deficiency Update

Personnel quick pick:

- Agnoletto, Laura | Personal Support Worker
- Cerner Test, Nurse Practitioner Cerner | Nurse Practitioner
- Cerner Test, Physician - Cardiovascular Cerner | Admitting Physician**
- Cerner Test, Physician - Emergency Medicine Cerner | ED Physician
- Cooke, Rachael | Nurse

* Deficient personnel (by name):

Cerner Test, Physician - Cardiovascular Cerner [Remove] Event date/time in EDT: 24/Oct/2023 0729

Document	Physician	Status
ED Note Physician		
Discharge Summary		
	Cerner Test, Physician - Cardiovascular Cerner	Document

Remove Document Select OK → **OK** Close

Click close

Note: The document is removed from the HIM Refusal Inbox (or selected provider's Documents to Sign folder) and moves to the selected provider's Anticipated Documents folder in the Message Center. In PowerChart.