

ONBASE DOCUMENT CORRECTIONS

Review Submitted Requests

Submitted document correction requests are processed in the **DCP – Document Correction Request Processing Workflow**.

1. Select the Correction Request from the workflow.
2. The Inbox tab will show the form submitted with the request.
3. The Related Items tab will show the document linked to the request.
4. Use the tasks to respond to the request.

The screenshot shows the OnBase interface with the following components:

- Workflow Ribbon:** Includes 'Document' and 'Electronic Form' tabs. A red box highlights the 'Tasks' section with buttons: Split Document, Re-Index Document, Delete Document, Place Request on Hold, Mark Form Completed, Reject Request Form, and Create Chart Object Request (DCP). A red callout '4' points to this ribbon.
- Life Cycles:** A list on the left with 'DCP - Document Correction Request Processing' highlighted. A red callout '2' points to this list.
- Inbox Table:** A table with columns: Name, Entry Date, Workflow Life Cycle, and Workflow Queue. The first row is selected. A red callout '1' points to the selected row.
- Primary Viewer:** Shows the 'Document Correction Processing Form' for a request from ROBERT BRUINS SLOT on 3/26/2021. A red callout '3' points to the 'Related Items' tab below the form.

Name	Entry Date	Workflow Life Cycle	Workflow Queue
3/26/2021 - REVIEW - Processed By: - Requested By: ROBERT BRUINS SLOT	3/26/2021 2:30 PM	DCP - Document Correction Requi	DCP - Correction Requests for Pro
3/26/2021 - REVIEW - Processed By: - Requested By: ROBERT BRUINS SLOT	3/26/2021 2:16 PM	DCP - Document Correction Requi	DCP - Correction Requests for Pro
03/24/2021 - REVIEW - Processed By: - Requested By: ROBERT BRUINS SLOT	3/24/2021 11:37 AM	DCP - Document Correction Requi	DCP - Correction Requests on Hold
03/24/2021 - REVIEW - Processed By: - Requested By: ROBERT BRUINS SLOT	3/24/2021 10:17 AM	DCP - Document Correction Requi	DCP - Correction Requests on Hold
03/24/2021 - REVIEW - Processed By: - Requested By: ROBERT BRUINS SLOT	3/24/2021 10:05 AM	DCP - Document Correction Requi	DCP - Correction Requests for Pro

Tasks

There are several tasks available for completing correction requests. You **must** use the task buttons in the ribbon to process the requests. Any other methods may result in documents not being processed correctly.

This screenshot highlights the task ribbon and an inbox table:

- Task Ribbon:** A red box highlights the 'Tasks' section with buttons: Split Document, Re-Index Document, Delete Document, Place Request on Hold, Mark Form Completed, Reject Request Form, and Create Chart Object Request (DCP).
- Inbox Table:** A table with columns: Entry Date, Request Status, Wrong Patient, Fix MRN, and Fix CSN.

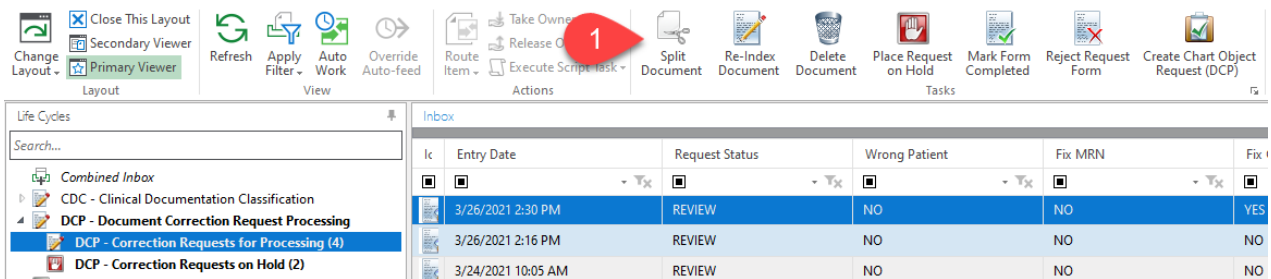
Entry Date	Request Status	Wrong Patient	Fix MRN	Fix CSN
3/26/2021 2:30 PM	REVIEW	NO	NO	YES
3/26/2021 2:16 PM	REVIEW	NO	NO	NO
3/24/2021 10:05 AM	REVIEW	NO	NO	NO

- A. **Split Document** – is for documents with multiple pages that need to be split into separate documents.
- B. **Re-Index Document** – is for updating the documents keywords and submitting to CottageOne.
- C. **Delete Document** – is for deleting the document and removing it from CottageOne.
- D. **Place Request on Hold** – is for moving the request to the on hold queue.
- E. **Mark Form Completed** – is for marking a request as completed.
- F. **Reject Request Form** – is for requests that do not require any changes.
- G. **Create Chart Object Request** – is for creating a Chart Object request.

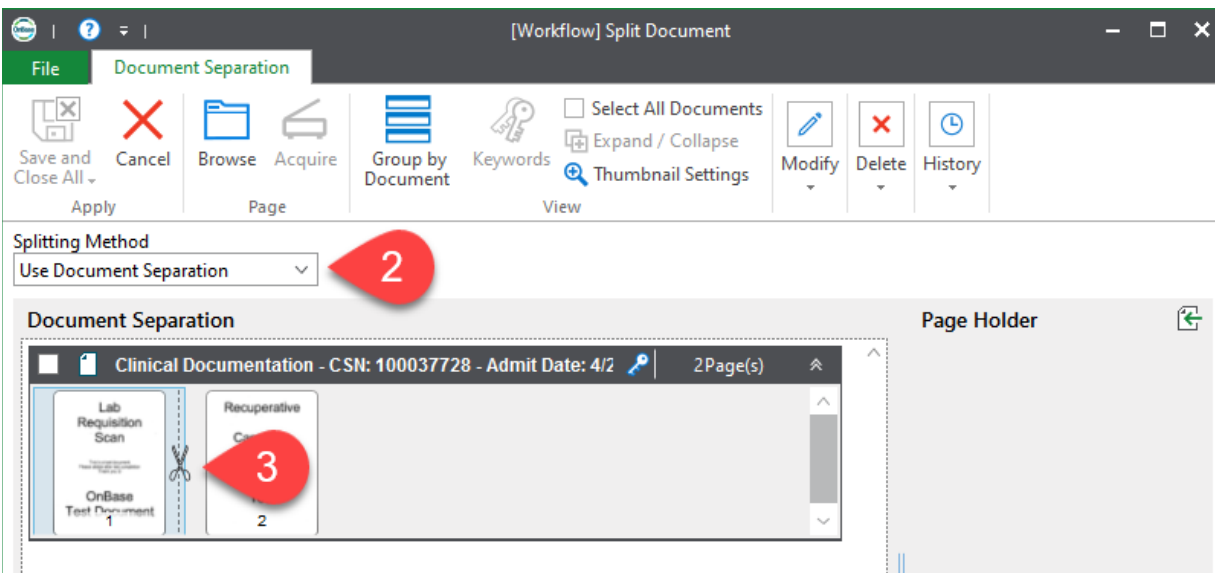
Split Document

If a document with multiple pages needs to be split into separate documents, use the Split Document task.

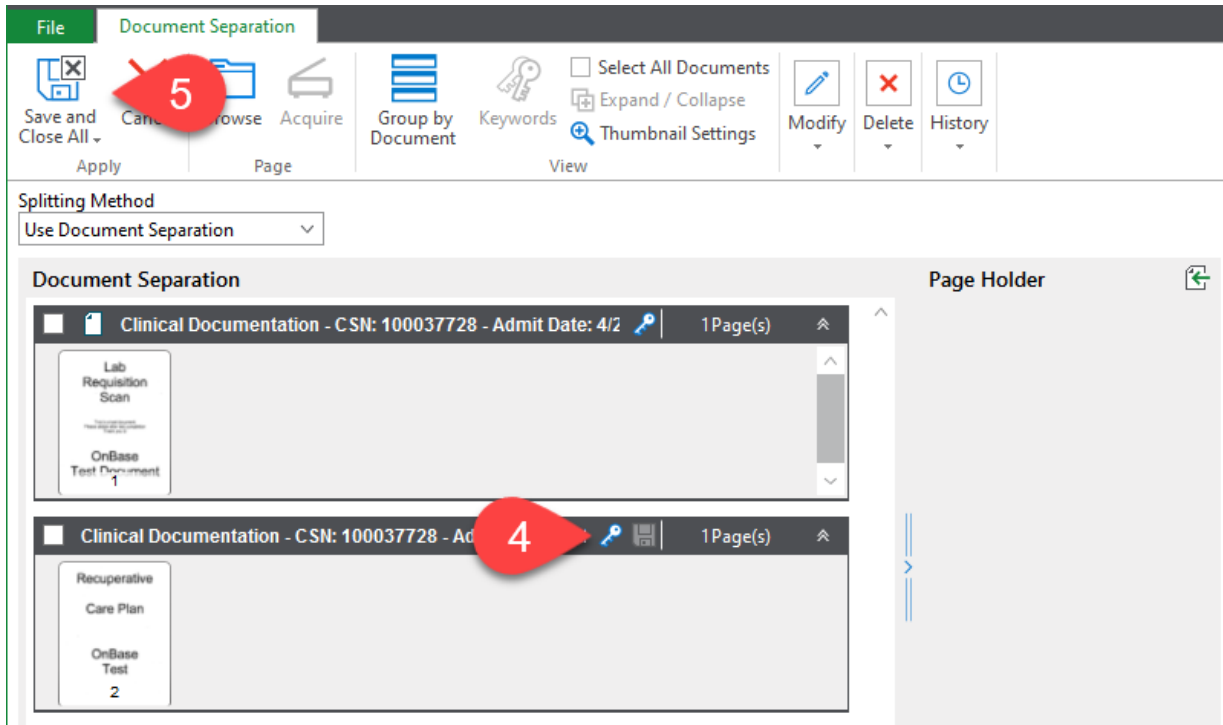
1. Select **Split Document**.



2. Set the Splitting Method to **Use Document Separation**.
3. Click in the space between pages to split at that point.

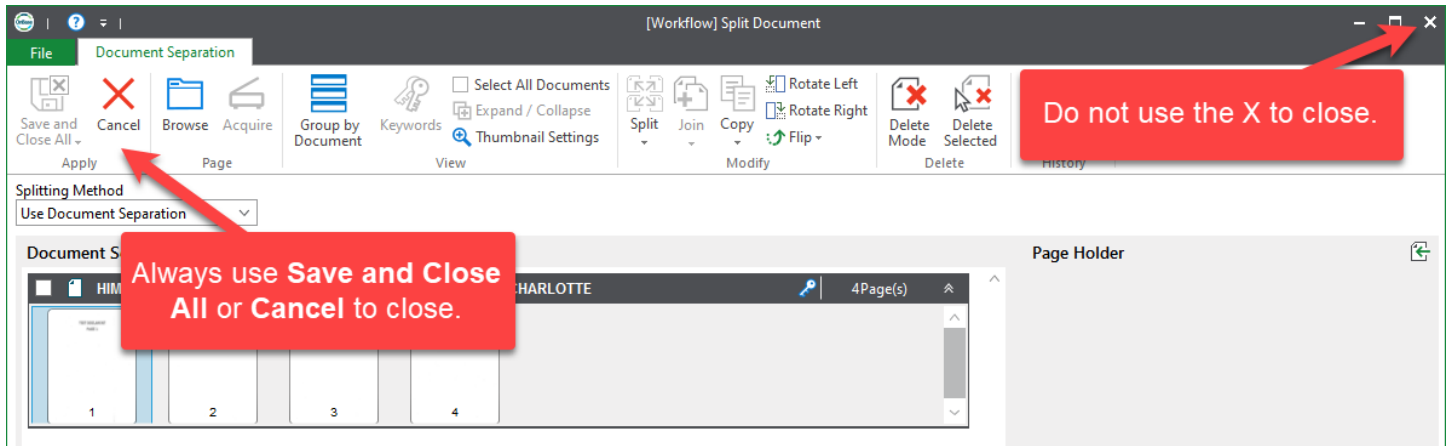


4. Each document is listed as a separate line. Use the Key icon for each document to set the keywords for each document.
5. When finished, select **Save and Close All**.



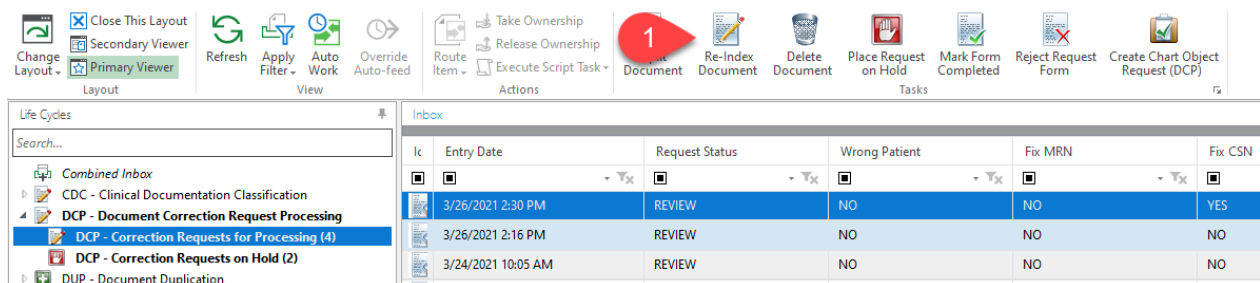
After completing the split, the first document will remain in the workqueue and the rest will be indexed. Use the Re-Index task to index the first document and complete the form.

Caution: Make sure to always Save and Close or Cancel the document separation. If you close the window without saving or canceling, the request form and document will be separated and a new request will need to be entered.



Re-Index Document

1. Select **Re-Index Document**.



2. Update the document type and/or keywords in the side panel.

3. Select **Re-Index** to confirm the changes and submit the document to CottageOne. The request will be marked as completed and removed from the workflow.

The screenshot shows the OnBase (OnBase TST - AL) interface. The 'Workflow Re-Index' dialog box is open, showing various fields for document correction. A red callout '2' points to the 'Re-Index' button in the dialog box. Another red callout '3' points to the 'Process Flow' button at the bottom of the main window.

Delete Document

If it's determined that the document does not need to be included in the medical record, it can be deleted from OnBase and CottageOne.

1. Select **Delete Document**.

The screenshot shows the OnBase interface with the 'Delete Document' button highlighted in the toolbar. A red callout '1' points to this button. The main window displays a table of documents in the 'Inbox' view.

Entry Date	Request Status	Wrong Patient	Fix MRN	Fix C
3/31/2021 7:47 AM	REVIEW	NO	NO	NO
3/26/2021 2:30 PM	REVIEW	NO	NO	YES
3/26/2021 2:16 PM	REVIEW	NO	NO	NO

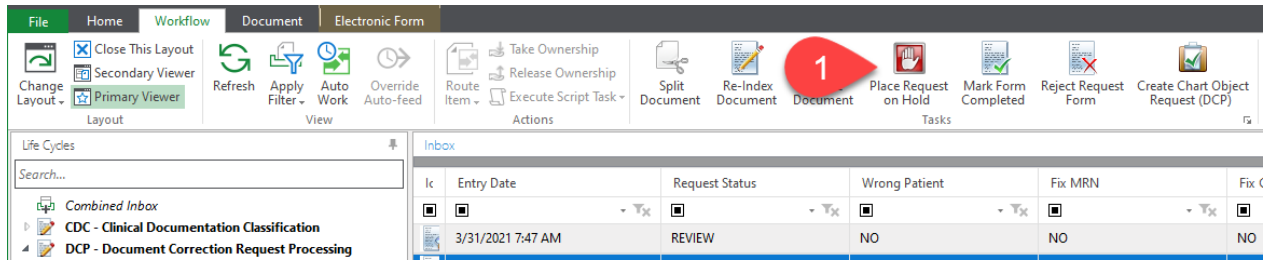
2. Confirm you want to delete the document. After confirmation the request will be marked as completed and removed from the workflow.

The screenshot shows a confirmation dialog box with the text: "Are you sure you want to delete the parent document from OnBase and Epic and change it to a Filed In Error document type? This will take a couple of minutes to complete." A red callout '2' points to the 'Yes' button.

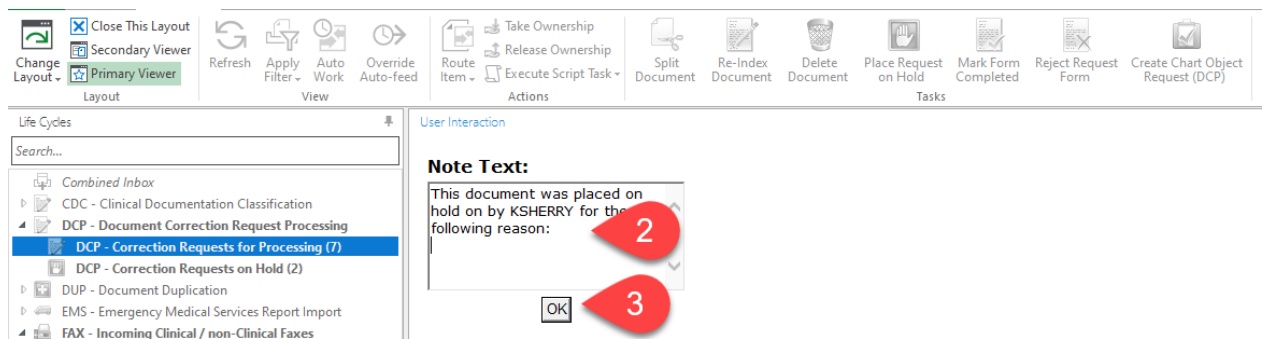
Place Request on Hold

If a request needs additional research before it can be completed, it can be moved to the hold queue.

1. Select **Place Request on Hold**.



2. Enter a free text reason for placing the request on hold.
3. Select OK.

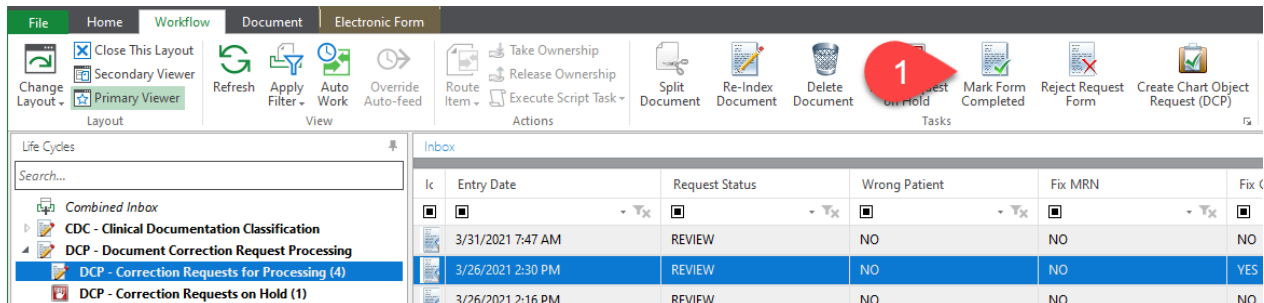


4. The request is now in the Correction Requests on Hold queue and can be processed from there when ready.

Mark Form Completed

In some scenarios the request will remain in the workflow although all necessary changes have been made. Use the **Mark Form Completed** option to manually complete the request and remove it from the workflow.

1. Select **Mark Form Completed**.



Reject Request Form

After reviewing the request, if it's determined that no changes are needed, you can reject the request to remove it from the workflow.

1. Select **Reject Request Form**.

The screenshot shows a software interface with a ribbon menu at the top. The 'Workflow' tab is active, showing options like 'Close This Layout', 'Secondary Viewer', and 'Primary Viewer'. Below the ribbon is a 'Tasks' pane with a red callout '1' pointing to the 'Form Completed' task. The main area displays an 'Inbox' table with the following data:

lc	Entry Date	Request Status	Wrong Patient	Fix MRN	Fix C
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3/31/2021 7:47 AM	REVIEW	NO	NO	NO
<input type="checkbox"/>	3/26/2021 2:30 PM	REVIEW	NO	NO	YES
<input type="checkbox"/>	3/26/2021 2:16 PM	REVIEW	NO	NO	NO