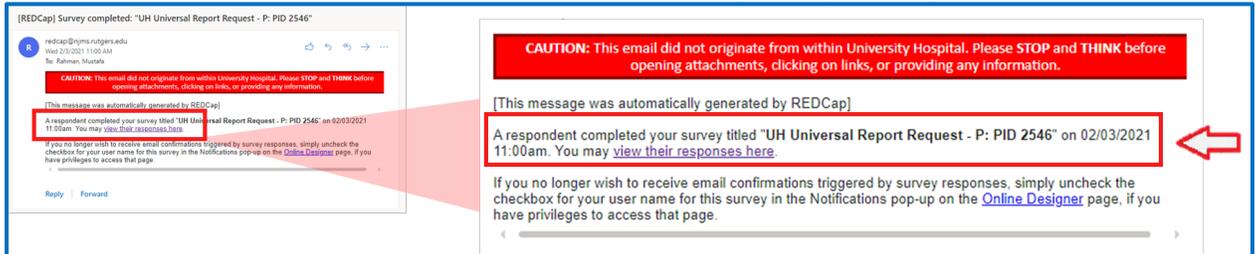


UNIVERSAL REPORTING PROCESS GUIDE FOR OPERATORS

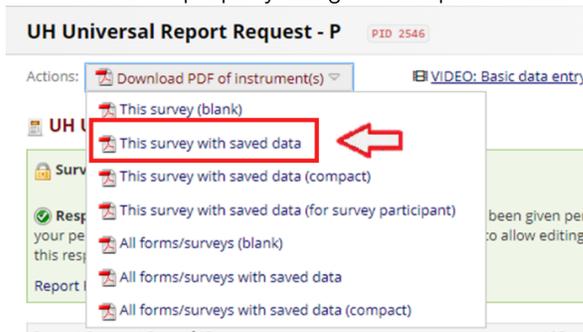
TRIAGE AND ASSIGN

Decision-making

1. Report Request email is delivered to the Operators email via RedCap with a specific link
2. Open the Report Request Link "View their responses here" to begin Triage & Assign process



3. Under Actions tab: Download the PDF survey with saved data and begin to review the following questions of the form in order to properly assign the request



- ❖ From which reporting team are you seeking data?

UH Universal Report Request - P: PID 2546 Page 2

Please Complete The Report Request Form Below, and the report development team that is responsible for your request will respond to you shortly.

Thank you!

Response was added on 01/13/2021 12:12pm.

Is this a request for Access to a System or Application? Yes No (If YES, please contact Help Desk @ x2-1500)

From which reporting team are you seeking data?

EPIC Billing Accounting / Budget Quality Decision Support Finance Other

Is this request Research related? Preliminary

- ❖ Existing report name
- ❖ Please provide sufficient details and description the data and information being requested

Report Description and Purpose

Is there an existing report that meets your criteria? (If uncertain or not sure, please choose "No") Yes No (If YES, please name report or attach report sample)

Existing report name: H2175085 FY19-20 ELG request (Ex. UH Surgical Patient denominator data for CDC: NHSM-SSI (surgical Site Infection) denominator data upload)

Sample report attachments: [FILE: H2175085 FY19-20 ELG request...] (1).xlsx

Will this report be for external use? (Example: Published research, state required data, media requests, etc.) Yes No (If YES, please define purpose.)

Please provide sufficient details and description of the data and information being requested: Will need the same report with the same fields and any diagnosis that codes for Obesity, Smoker, Hypertension, COPD, Diabetes, AND Stroke. In addition, we would like to add fields for Race and Ethnicity.

Best contact for the billing department is Robert Litwin (litwinr@uhnj.org)

4. Based on the information in number 3, Make decision on which is the appropriate reporting team for this request to be assigned.
5. If the request is missing information or is incomplete, the request will need to be rejected and resubmitted by the requestor. Email the requestor for the fulfillment of the report request.

Example for UH Research Approved is missing UH research Plan attachment.

UH leadership has given us direction to develop a more consistent record for research related data requests. Can you please re-submit this request <https://research.njms.rutgers.edu/redcap/surveys/?s=CCCFKNKTD7>. But this time, can you attach the UH approval for the research directly to the request? Once that occurs, we will quickly route and assign this request for action. Sorry for any inconvenience. Thank you.

Is this request Research related?

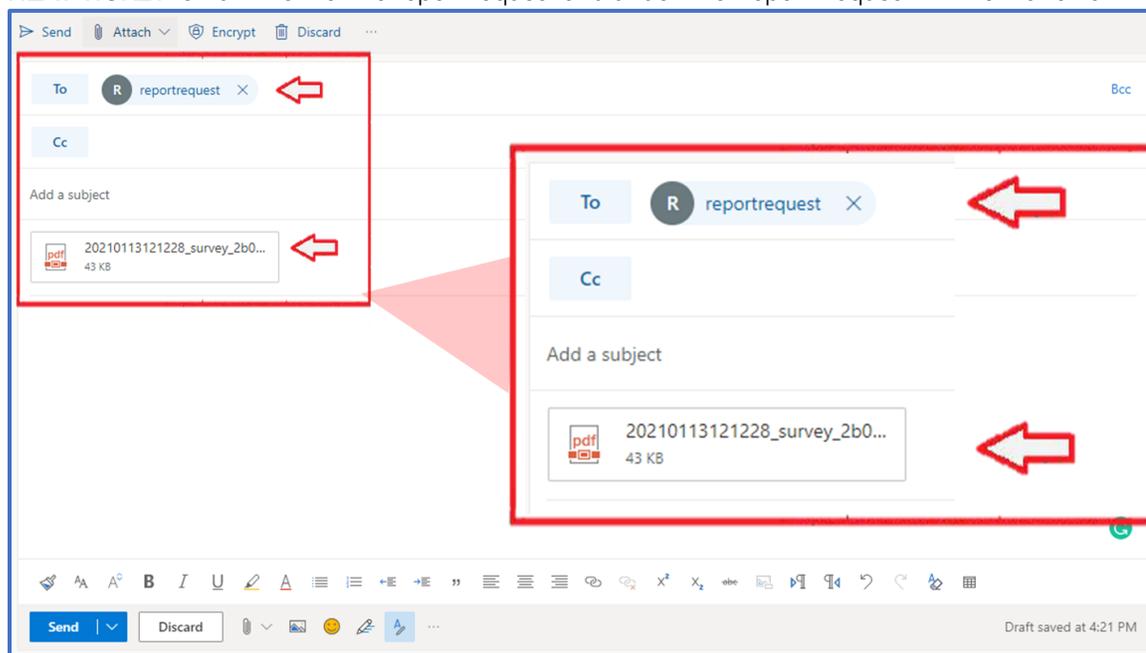
Preliminary
 Research UH APPROVED
 Research NOT UH Approved
 NOT research related
 (If Research UH APPROVED, Please attach a fully signed and approved research plan:)

Please attach a fully signed and approved UH Research Plan:

6. If it is unclear which reporting team is appropriate, please reach out to Hamani Franklin or Mustafa Rahman at franklha@uhnj.org or rahmanm6@uhng.org respectively.

Mechanics

7. If the appropriate reporting team is an Epic team, via an email to reportrequest@uhnj.org create a **HEAT TICKET** for fulfillment of the report request and attach the Report Request PDF to that email.



8. If the appropriate reporting team is a not an Epic team, email the appropriate reporting team for fulfillment of the report request and attach the Report Request PDF to that email (be sure to include any files/attachments the requestor provided). Please note if there are any **URGENT** requests be sure to include in the message template below that it is an urgent request and set the importance to high on the email.

This email is to inform you that report request <insert request number> has been assigned to you in Redcap. Please reach out to the requester to confirm understanding of the requirements to deliver this report. The requester's information can be found on page <insert page number> of the attached request. If you have any questions about this assignment, please advise.

Please note this is an Urgent Request.

Thanks,

List of Common Emails

Name	Department	Email
Sherry Dine	EPIC	dinesh1@uhnj.org
Robert Litwin	Billing	litwinrj@uhnj.org
Irene Szczec	Billing	szczecir@uhnj.org
Nina Awan	Vizient/Quality	awanni@uhnj.org
Soyon Bongiovanni	Finance/Decision Support	bongiouse@uhnj.org
David Barone	Finance/Budgeting	baroned2@uhnj.org
Marlon Vitalicio	Finance	vitalimr@uhnj.org
Vy Tran	Finance	tranvy@uhnj.org
Jonathan Green	Emergency Department	greenjp@uhnj.org
Robert Baker	Ambulatory Care Center	bakero2@uhnj.org
Luis Perez	Ambulatory Care Center	perezla1@uhnj.org
Sergio Romero Medina	Peri Op	romerose@uhnj.org
Richard Ragovin	Clinical Diagnostic	ragovirm@uhnj.org
Cynthia Comerford	Laboratory	comerfca@uhnj.org

Downloading Attachments/Files

Open the Report Request Link "View their responses here". Then scroll down and click on each file name and it will begin to automatically download

[REDCap] Survey completed: "UH Universal Report Request - P: PID 2546"

redcap@uhms.rutgers.edu
Sent: 02/03/2021 11:00 AM
To: Rahman, Mustafa

CAUTION: This email did not originate from within University Hospital. Please STOP and THINK before opening attachments, clicking on links, or providing any information.

This message was automatically generated by REDCap.

A respondent completed your survey titled "UH Universal Report Request - P: PID 2546" on 02/03/2021 11:00am. You may [view their responses here](#).

If you no longer wish to receive email confirmations triggered by survey responses, simply uncheck the checkbox for your user name for this survey in the Notifications pop-up on the [Online Designer](#) page. If you have privileges to access that page.

Reply | Forward

Upload Fully signed Research Plan:
or contact : UH - Clinical Research Services (CRS) @ UH-
CRS@uhnj.org

[Dr Aditi Khokhar_Pro20200...Plan.pdf \(0.53 MB\)](#)

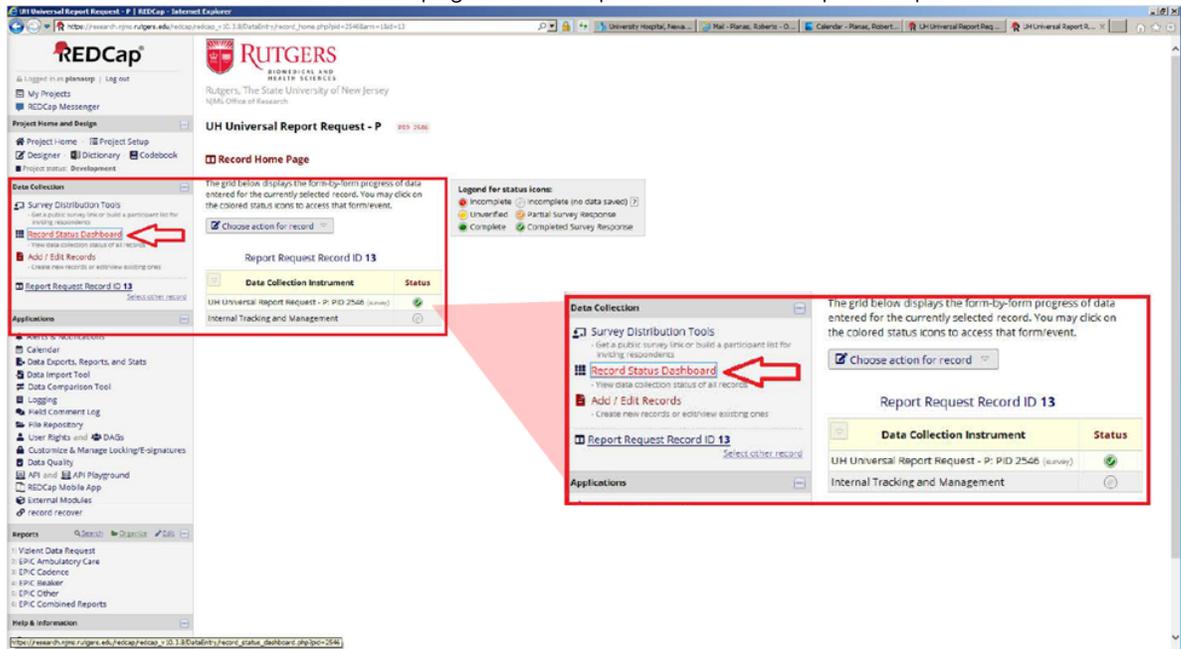
Sample report attachments:

[EP-ED-CENTRAL-LOG_2019010...91231.xls \(17.74 MB\)](#)

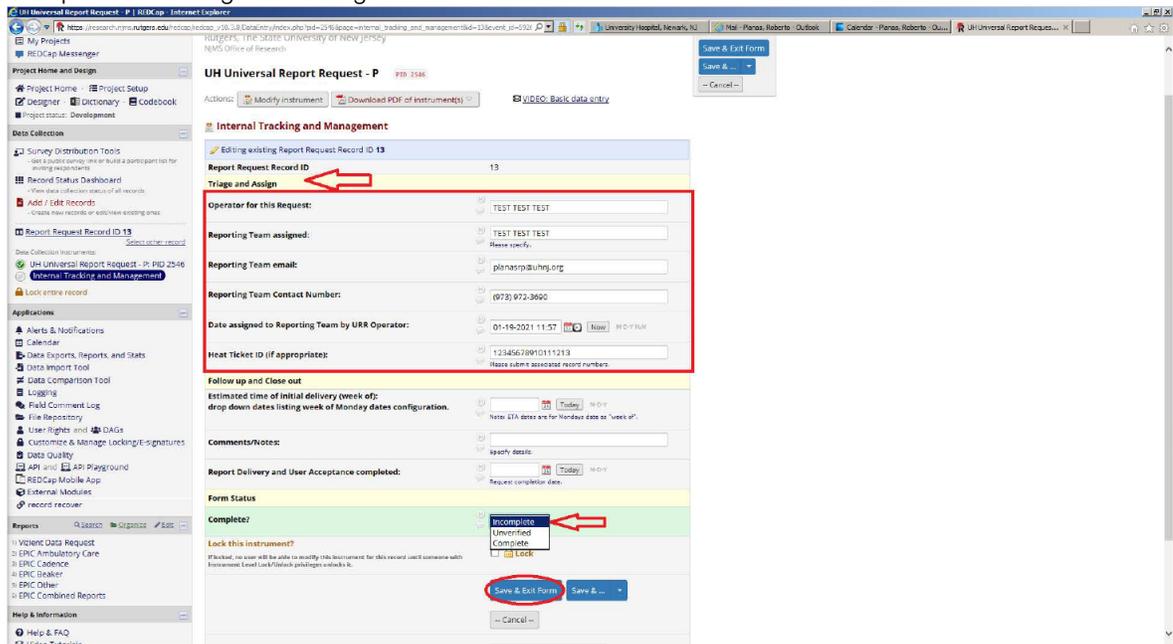
Please attach any supplementary information that might help the reporting teams better understand and service your request:

[IRB Protocol Version 2 1....CLEAN.pdf \(0.19 MB\)](#)

9. Go to the Record Status Dashboard page on RedCap and Select the Report Request ID Number



10. Complete the "Triage and Assign" section. Then Click the "Save & Exit" at the bottom of the form.



11. The Report Request has now been assigned

END OF TRIAGE AND ASSIGN

FOLLOW-UP AND CLOSE OUT

1. **Once a week** on Thursday morning, open the Record Status Dashboard on RedCap

2. Look for items with a red stop sign in the Internal Tracking and Management section. *These items have been assigned to reporting teams* but are not yet captured in Redcap as completed.

Report Request Record ID	UH Universal Report Request - P, PID 2546	Internal Tracking and Management
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		

3. For each incomplete Report Request form, follow-up with the appropriate reporting team via email and/or phone according to the following script:

<This is to inform you that request #XXXX which was assigned to you on XXX/XXX is listed as incomplete in the Red Cap System. Has this request been fulfilled?

 - If Yes - when was it completed?
 - If No - Please advise a timeline of when the request will be fulfilled. Thank you for your cooperation.>

4. **Every Friday**, once you have received information from the various reporting team. Click on the red stop sign on the **Internal Tracking and Management Status** in the Record Status Dashboard. Update the “Follow-up and close out” then Click the “Save & Exit” at the bottom of the form.

The screenshot shows a web application interface for managing report requests. The main content area is titled "Internal Tracking and Management" and is for "Editing existing Report Request Record ID 13".

- Triage and Assign:** Includes fields for "Operator for this Request" (TEST TEST TEST), "Reporting Team assigned" (TEST TEST TEST), "Reporting Team email" (plnarsrp@uiwyo.org), and "Reporting Team contact Number" (8773 972-3650).
- Follow up and Close out:** Includes a date field for "Date assigned to Reporting Team by URK Operator" (01-19-2021 11:57 AM) and a "Heat Ticket ID (if appropriate)" field (12345678910111213).
- Form Status:** A dropdown menu is open, showing "Incomplete" (selected) and "Complete?". A red arrow points to the "Complete?" option.
- Buttons:** At the bottom, the "Save & Exit Form" button is circled in red.
- Calendar:** A calendar icon with "FRIDAY" is overlaid on the right side of the form.

5. The report request is ready for status reporting

END OF FOLLOW-UP AND CLOSE OUT