

# Record Organizing & Workflow

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## Overview

When we receive medical records from providers, it is typically the patients entire medical history that the particular provider has. This means that we receive one pdf that spans several years and may contain many hundred pages. It is necessary for us to break this pdf up into each individual document so that we can create a timeline for the pathfinder. Record Organizing is the process by which we determine what pages each document is on, and then split the record into those individual documents.

Goals:

- Provide the ability for a Record Admin to upload a medical record to the system.
- Provide the ability for a Record Organizer or Record Admin to attach a split definition file.
- Provide the ability for a Record Organizer to mark a record organized.
- Provide the ability for a Record Organizer to review an organized record.
- Provide the ability for a Record Organizer to mark a record reviewed.
- Provide the ability for a Record Admin to split a record.

# Use Cases

## Record Admin Uploads Record

Betterpath receives a record from a provider or our records requesting service, and the Record Admin needs to get the Record into our system. The Record Admin searches for the Patient in our system, goes to their patient page, and selects a filter on the Records side of the screen (as opposed to the encounters side). The Record Admin clicks Upload and uses a standard file picker to select which Record (pdf) they would like to upload. The Record is uploaded and appears under "Uploaded - ready to be organized". At this point the Record Admin has the option to assign the record to a specific Record Organizer, but this is not required.

## Record Organizer organizes an unorganized Record

A Record Organizer logs into Betterpath and they see on their homepage that there are several unassigned, unorganized records and if applicable, they see any records that have been assigned to them for organization. The Record Organizer clicks Organize Next Record to grab the next unassigned unorganized record from the pile. The Record Organizer sees a full screen pdf viewer with options for zooming, scrolling, etc. They go through the Record and fill out a split definition file, which is an excel file that outlines which pages of the record correspond to different medical encounters, providers, and date ranges. Once they have finished filling out the split definition file, they click finalize, then select the spreadsheet that they would like to attach using a standard file picker. They can then mark the record as organized and go to the next record, or go back to their home page.

## Record Organizer reviews an organized Record

A Record Organizer logs into Betterpath and they see on their homepage that there are several unassigned records awaiting review, and if applicable, they see any records that have been assigned to them for review. The Record Organizer clicks Review Next Record to grab the next unassigned record for review. The Record Organizer downloads the attached split definition and checks the previous Organizer's work. If the record was organized correctly, the Reviewer can simply click Mark Reviewed. If there are corrections that need to be made the Reviewer clicks edit and uploads a corrected split definition using a standard file picker.

## Record Admin splits a Record

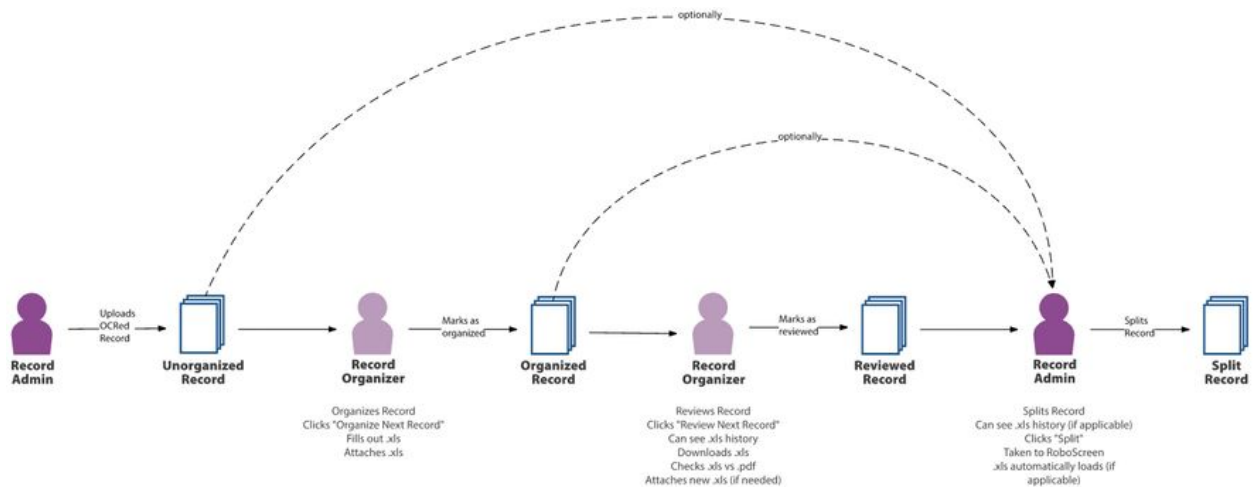
The Record Admin goes to a Patient's page and hovers over any record (regardless of status). The Record Admin has the option to Split the record by clicking on Split. The Record Admin is taken to the "RoboRob" screen where any attached split definition is loaded and the documents

that will be created from the split are previewed. Note: If the record chosen does not have a split definition attached, the Record Admin must upload one at this point. If the Record Admin would like to proceed with the split, they simply click Split.

## Non-Goals/Open Issues

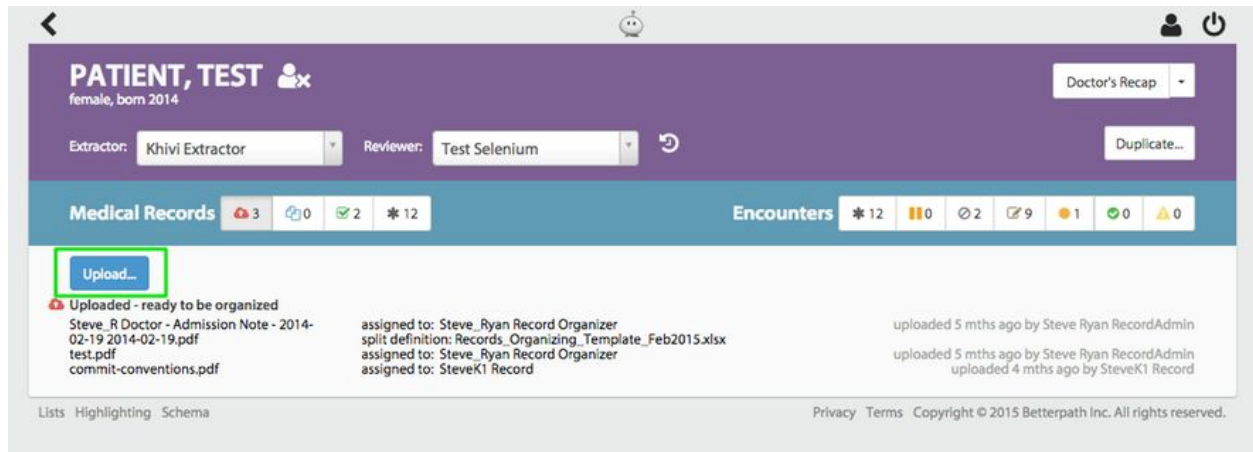
- This functionality does not cover the requesting of the record or tracking of its status. That is handled by the [provider request functionality](#).
- This functionality does not cover the splitting of the record into individual documents. That is handled by the [Split functionality](#).

## Flowchart

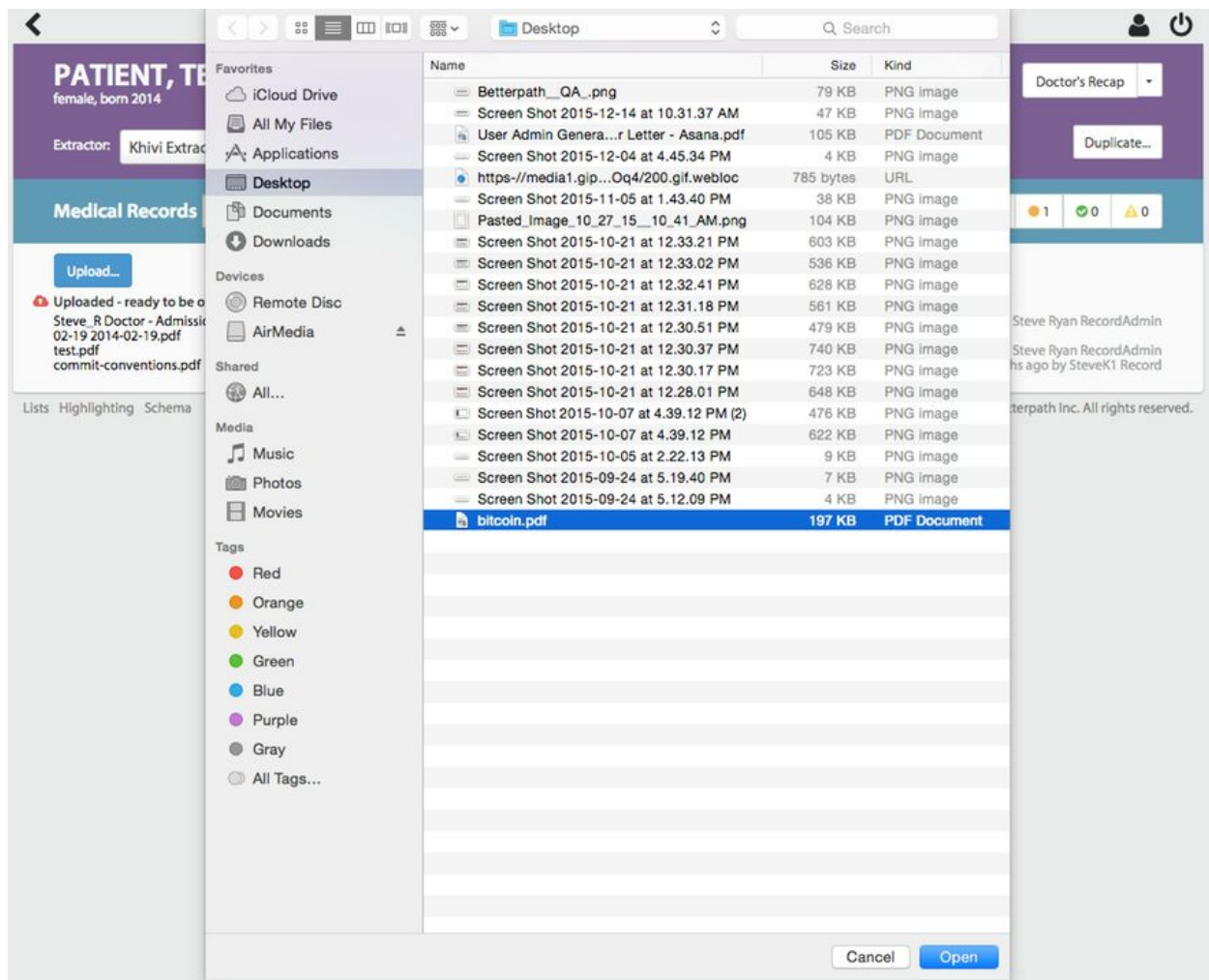


# Screen Specification

Record Admin is on the Patient page and selects “Upload...”

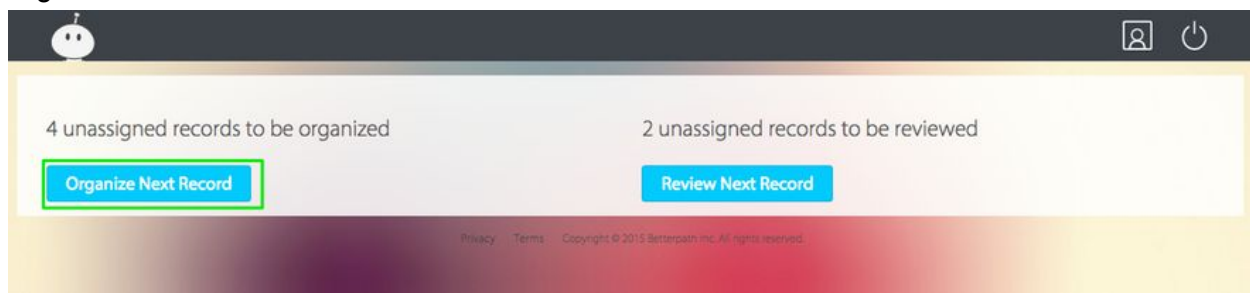


## Record Admin selects record with a standard file picker



## Record Organizer selects unorganized record

Record Organizer logs in and sees 4 unassigned records that are unorganized. They click Organize Next Record.



## Record Organizer organizes record

Record Organizer fills out their excel organizing template. They click finalize.

The screenshot shows a web application interface for organizing records. At the top, there is a navigation bar with a back arrow, a robot icon, and a power icon. Below this is a header area with a search bar and a 'Finalize...' button highlighted with a green box. The main content area displays a form titled 'Labor Law Section 195(1) Notice and Acknowledgement of Wage Rate and Designated Payday Hourly Rate Plus Overtime'. The form is divided into two columns: 'Employer' and 'Employee'. The 'Employer' column contains fields for Company Name, FEIN, Street Address (5 Mill Lane), City, Zip, Phone, Preparer's Name, and Preparer's Title (CSA). The 'Employee' column contains fields for Name, Street address, Apt. City, State, and Phone. Below these columns, there are fields for 'Your rate of pay' (per annum), 'Your overtime rate of pay' (N/A per hour), and 'Designated pay day' (semi-monthly). A certification statement follows, stating that the information is true and accurate. At the bottom, there is a 'Date' field (06/02/2015) and a signature line labeled '[Preparer's Signature]'. A footer at the very bottom contains links for 'Privacy', 'Terms', and 'Copyright © 2015 Betterpath Inc. All rights reserved.'

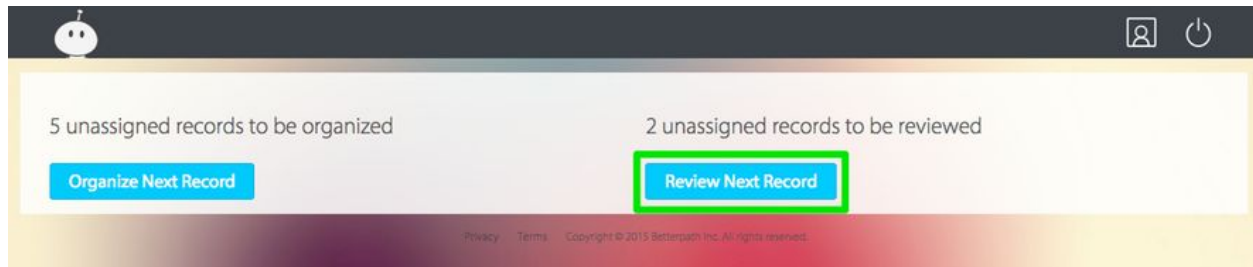
## Record Organizer uploads split definition

Record Organizer clicks Select Spreadsheet and uploads their excel split definition file using a standard file picker.

The screenshot shows the same web application interface as before, but with a 'Split Definition' dialog box open. The dialog box has a title bar with a close button (X) and a 'Select Spreadsheet...' button highlighted with a green box. Below the dialog box, there are two buttons: 'Mark As Organized - Go To Next Record' and 'Mark As Organized - Return Home'. The background shows the same form as the previous screenshot, but it is partially obscured by the dialog box.

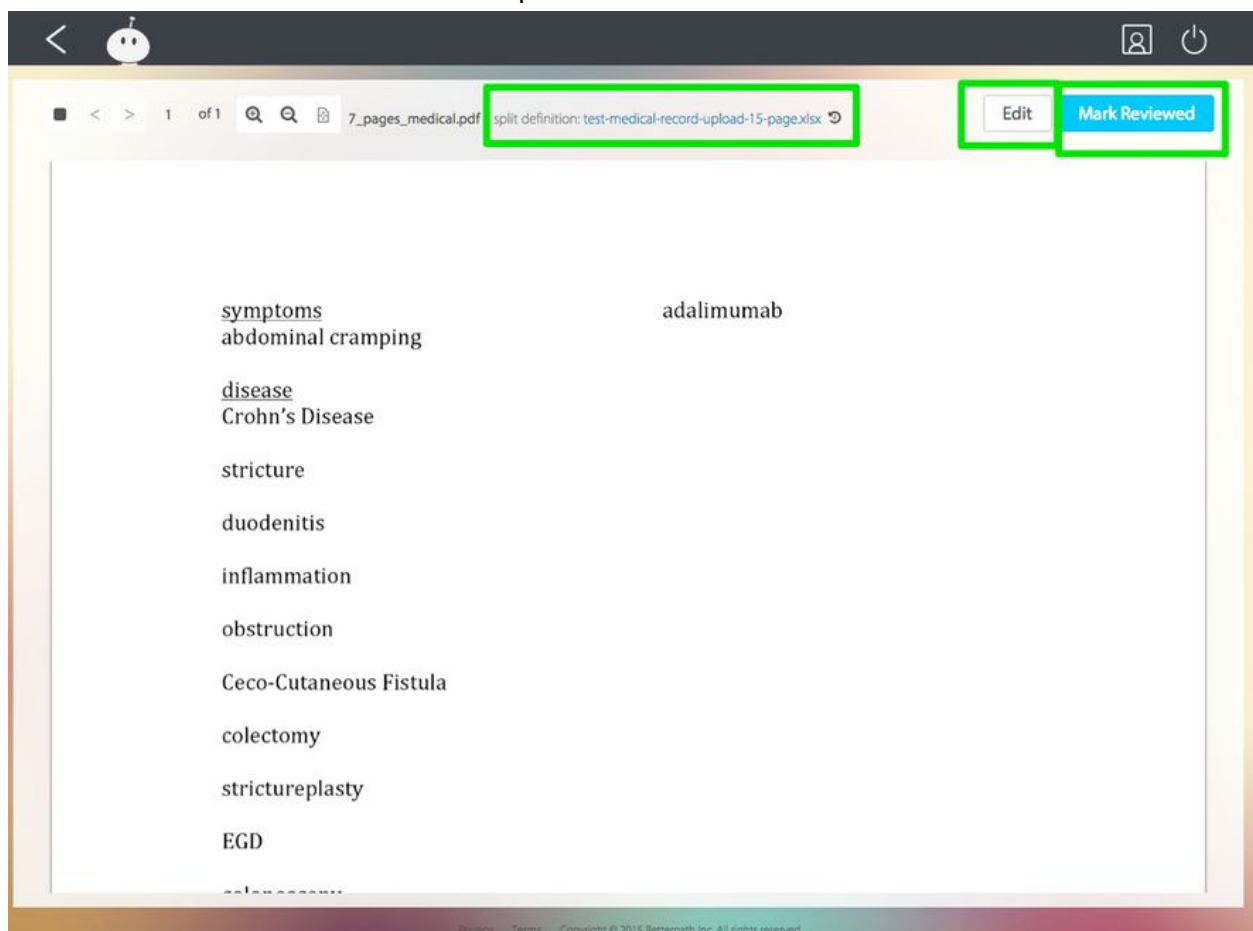
## Organizer-Reviewer selects organized record

On the Record Organizer homepage the Record Organizer clicks Review Next Record.



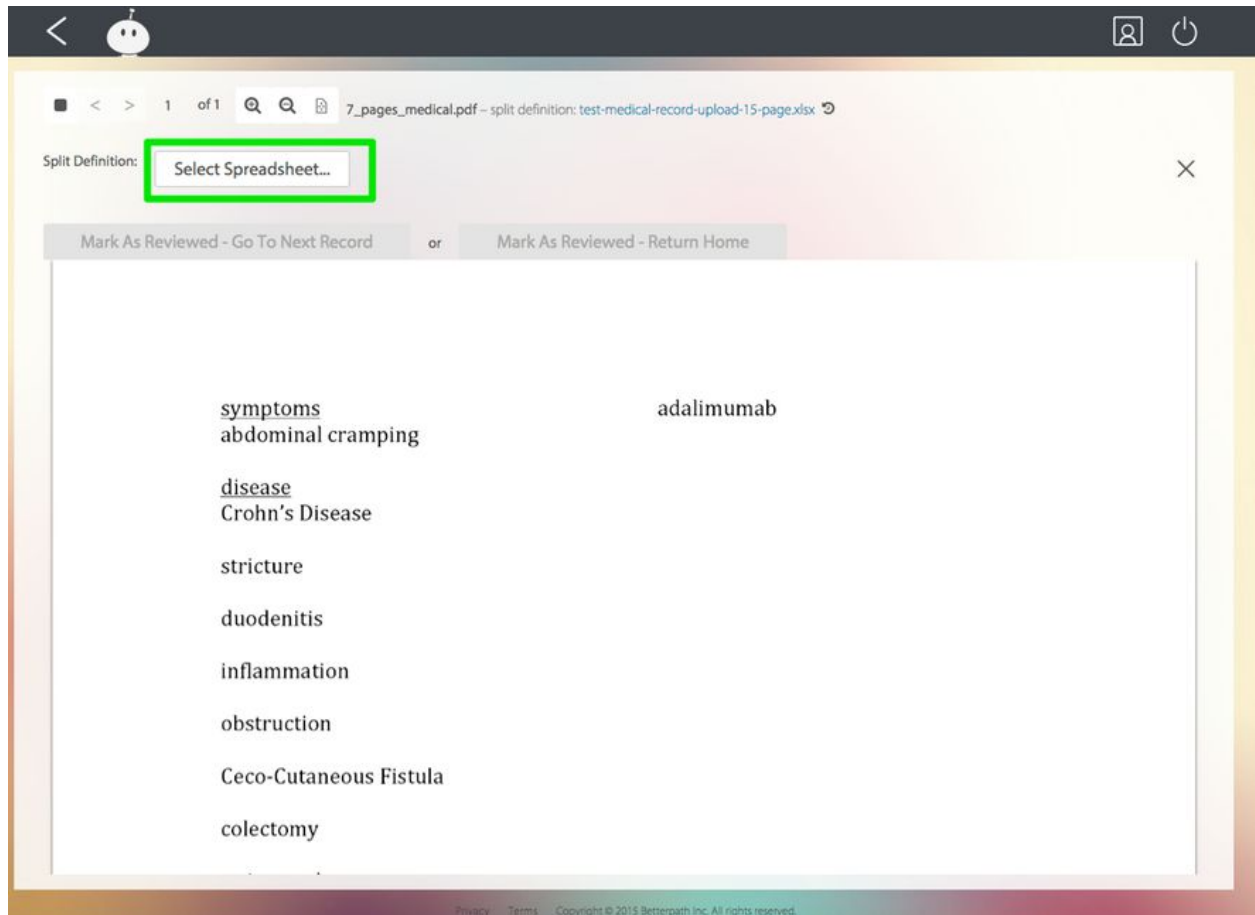
## Organizer-Reviewer reviews record

Record Organizer is able to download the split definition file attached to this record and check it for accuracy and completeness. If everything looks good they can "Mark Reviewed", if not, they can click "Edit" and attach a corrected split definition file.



## Organizer-Reviewer uploads new split definition

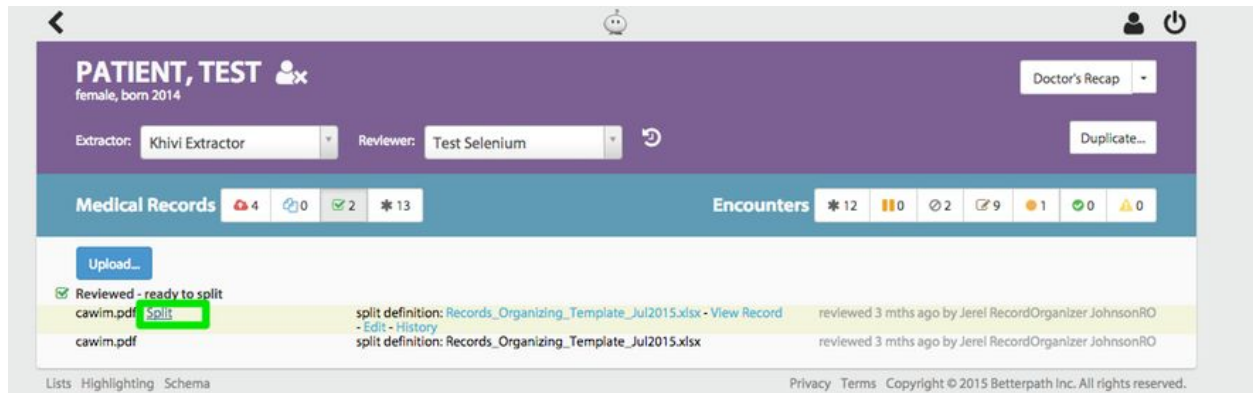
Record Organizer chose to edit the organized record, and attaches a new, corrected split definition file using a standard file picker.



## Record Admin views list of organized records

Back on the Patient's Page a Record Admin filters on Reviewed records and has the option to Split them.





## Record Admin splits record

When the Record Admin selects Split, the split definition file is loaded and a preview of what the split record will look like is displayed. The Record Admin can cancel the split or confirm it at this point. For mechanics of the actual Split, see [Split & Split Logic](#).

