

# Contact Mover Tutorial

The contact mover is designed to move a document from one patient (source patient) to another patient (target patient). The document will be retracted from the source patient and then appear in the target patients' chart.

## Assumptions:

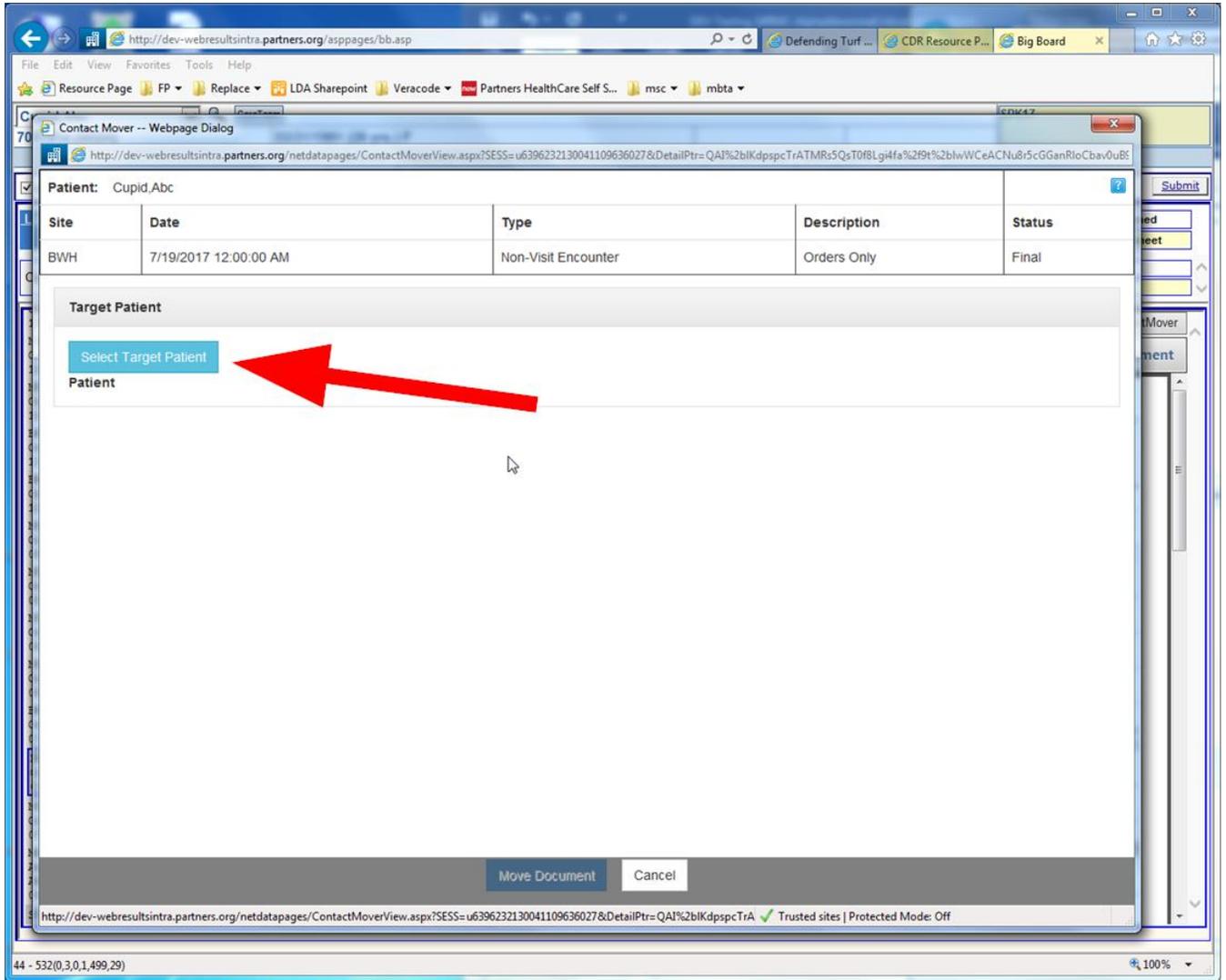
- The document was sent to the CDR/DR from EPIC (All EPIC documents are in PDF form, no text)
  - Limited to Notes, Operative Reports and Discharge Summaries
- The content of the PDF including source patient MRN and name will not change after a contact move
- User has the SITE MRN of the SOURCE and TARGET patient

## Steps to move a document:

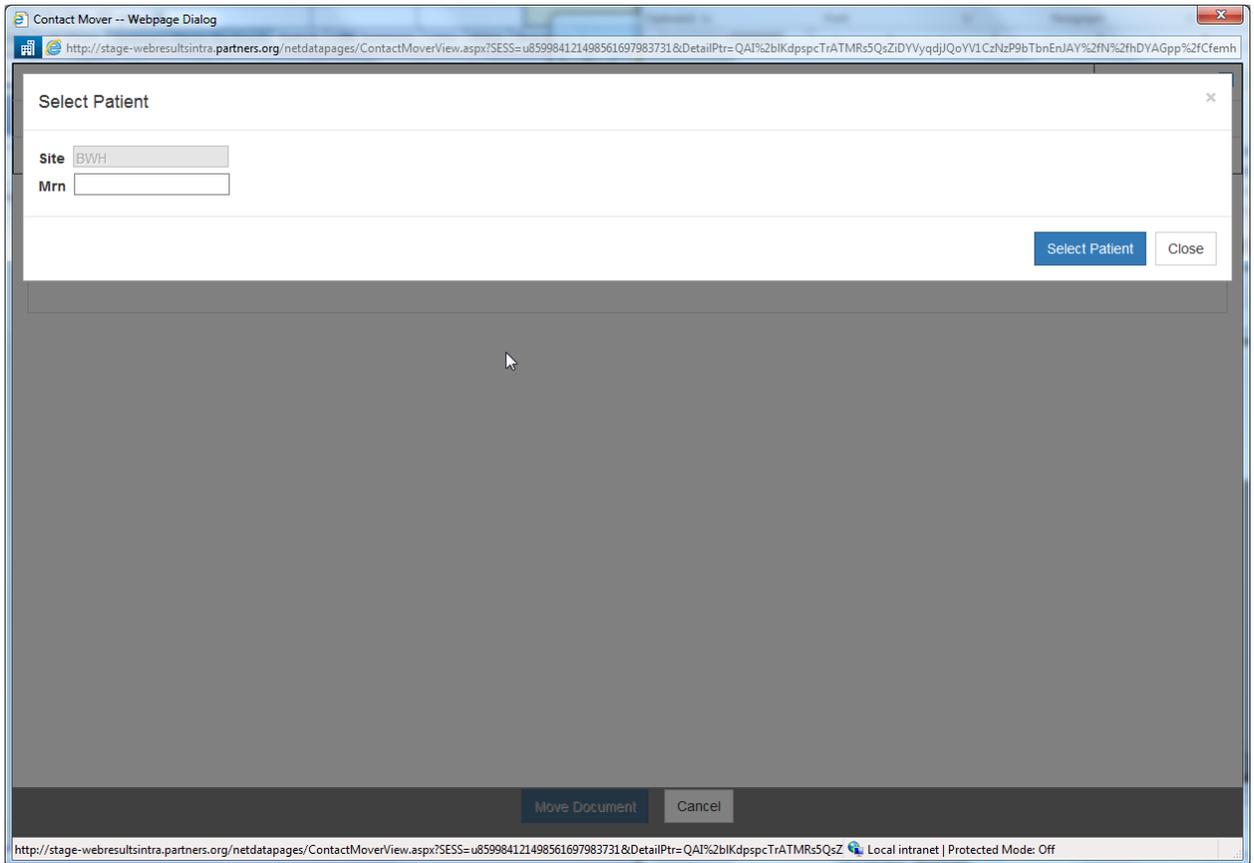
1. Open Results Web (<http://clinical.partners.org/scripts/phsweb.swl?APP=CDRWEB&PKG=7>)
2. Select source patient that has the result that needs to move
3. Find the result in the patients' chart
4. Top right of the PDF there will be a button called "ContactMover"
  - a. User needs PAS authorization (CDRUTIL -> C 'Contact Mover')
  - b. Document must be from Epic
  - c. Must be in Results Web application (Not PHSViewer)
5. Click on the 'ContactMover' button

The screenshot displays the clinical partners.org interface. The patient information at the top shows 'Cupid, Abc' with MRN 7007814 (MGH) and birth date 03/31/1991 (26 yrs.) F. The interface includes a navigation bar with 'Select', 'Lab Views', 'Summary Views: Big Board', 'LMR Flowsheets', 'Search', 'LMR Summary', 'Links', 'Home', and 'Resource'. Below this is a table of document categories: Chem, Imm, BBank, Path, OpRpt, Endosc, Note, Scanned, Hem, Micro, Rad, Card, Disch, Pulm, Neuro, Flowsheet. The main content area shows a list of documents on the left and a detailed view of a document on the right. The document view includes fields for 'Reason for Visit', 'Diagnoses', 'Encounter-Level Documents', and 'ED Arrival Information'. A red arrow points to the 'ContactMover' button in the top right corner of the document viewer. The document content includes patient information: 'Cupid, Abc (MR # 90053901)', '7/19/2017 Orders Only', 'MRN: 90053901', 'Department: Bwh Cardiology', 'Encounter Date: 07/19/2017', 'Description: Female DOB: 3/31/1991', and 'Provider: Cardiologist Cardiant, MD'. Other sections include 'Reason for Visit', 'Diagnoses', 'Progress Note', 'Chart Review Routing History', 'CC'd Chart Routing History', 'Communication Routing History', 'Allergies as of 7/19/2017', 'Medical History', 'Surgical History', 'Socioeconomic', and 'Occupational as of 7/19/2017'.

6. A new window will appear, click on the 'Select Target Patient' button



7. A popup will appear on the screen where the user will type in the SITE MRN and the SITE is default to the sending site of the document. Once the MRN number is filled out, click on 'Select Patient' button.
  - a. Clicking Close will bring you back to the contact mover page



Contact Mover -- Webpage Dialog

http://stage-webresultsintra.partners.org/netdatapages/ContactMoverView.aspx?SESS=u859984121498561697983731&DetailPtr=QAI%2bIKdpspcTrATMRs5Q

### Select Patient

Site

Mrn

Select Patient Close

Move Document Cancel

http://stage-webresultsintra.partners.org/netdatapages/ContactMoverView.aspx?SESS=u85 Local intranet | Protected Mode: Off

8. The target patient information is now displayed on the page, if this is not the correct target patient please click on the 'Select Target Patient' button again to choose a different patient.

The screenshot shows a web browser window titled "Contact Mover -- Webpage Dialog". The address bar contains the URL: <http://stage-webresultsintra.partners.org/netdatapages/ContactMoverView.aspx?SESS=u859984121498561697983731&DetailPtr=QAI%2bIKdpsscTrATMRs5SQ>. The main content area displays patient information for "Cdrepictest,Bwhdecone".

Site	Date	Type	Description	Status
BWH	6/8/2015 12:00:00 AM	Non-Visit Encounter	Orders Only	Final

Below the table is a section titled "Target Patient" containing a "Select Target Patient" button. A yellow box highlights the following patient details:

Patient	OE-TEST, MCGEORGE
MRN	97009343 (BWH)
DOB	12/19/1945
Sex	M

At the bottom of the interface are two buttons: "Move Document" and "Cancel". The browser's status bar at the bottom shows the URL: <http://stage-webresultsintra.partners.org/netdatapages/ContactMoverView.aspx?SESS=u85> and indicates "Local intranet | Protected Mode: Off".

9. Once you confirm that the target patient is correct, click on the 'Move Document' button.
  - a. Clicking Cancel will close out of the contact mover page.

Contact Mover -- Webpage Dialog

http://stage-webresultsintra.partners.org/netdatapages/ContactMoverView.aspx?SESS=u859984121498561697983731&DetailPtr=QAI%2bIKdpspcTrATMRs5Q

Patient: Cdrepicest,Bwhdecone

Site	Date	Type	Description	Status
BWH	6/8/2015 12:00:00 AM	Non-Visit Encounter	Orders Only	Final

**Target Patient**

Select Target Patient

Patient: OE-TEST, MCGEORGE

MRN: 97009343 (BWH)

DOB: 12/19/1945

Sex: M

Move Document Cancel

http://stage-webresultsintra.partners.org/netdatapages/ContactMoverView.aspx?SESS=u85 Local intranet | Protected Mode: Off

10. A popup warning message will appear asking you to confirm this action. Click OK
- a. Clicking Cancel will not make any changes and will bring you back to the Contact Mover page.

The screenshot shows a web browser window titled "Contact Mover -- Webpage Dialog". The address bar contains the URL: <http://stage-webresultsintra.partners.org/netdatapages/ContactMoverView.aspx?SESS=u859984121498561697983731&DetailPtr=QAI%2bIKdpspcTrATMRs5Q>. The page displays patient information for "Cdrepicest,Bwhdecone".

Site	Date	Type	Description	Status
BWH	6/8/2015 12:00:00 AM	Non-Visit Encounter	Orders Only	Final

Below the table is a "Target Patient" section with a "Select Target Patient" button and fields for Patient, MRN, DOB, and Sex.

A red-bordered dialog box titled "Message from webpage" is overlaid on the page. It contains the following text:

\*\*\*WARNING\*\*\*  
Moving Document cannot be reversed.  
Please confirm that you intend to move this document from the Electronic Health Record.

The dialog box has "OK" and "Cancel" buttons.

At the bottom of the page, there are "Move Document" and "Cancel" buttons.

The browser's status bar at the bottom shows the URL: <http://stage-webresultsintra.partners.org/netdatapages/ContactMoverView.aspx?SESS=u85> and "Local intranet | Protected Mode: Off".

11. A popup message will appear letting the user know that the move is in process.

Document move in process.

BWH	6/8/2015 12:00:00 AM	Non-Visit Encounter	Orders Only	Final
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**Target Patient**

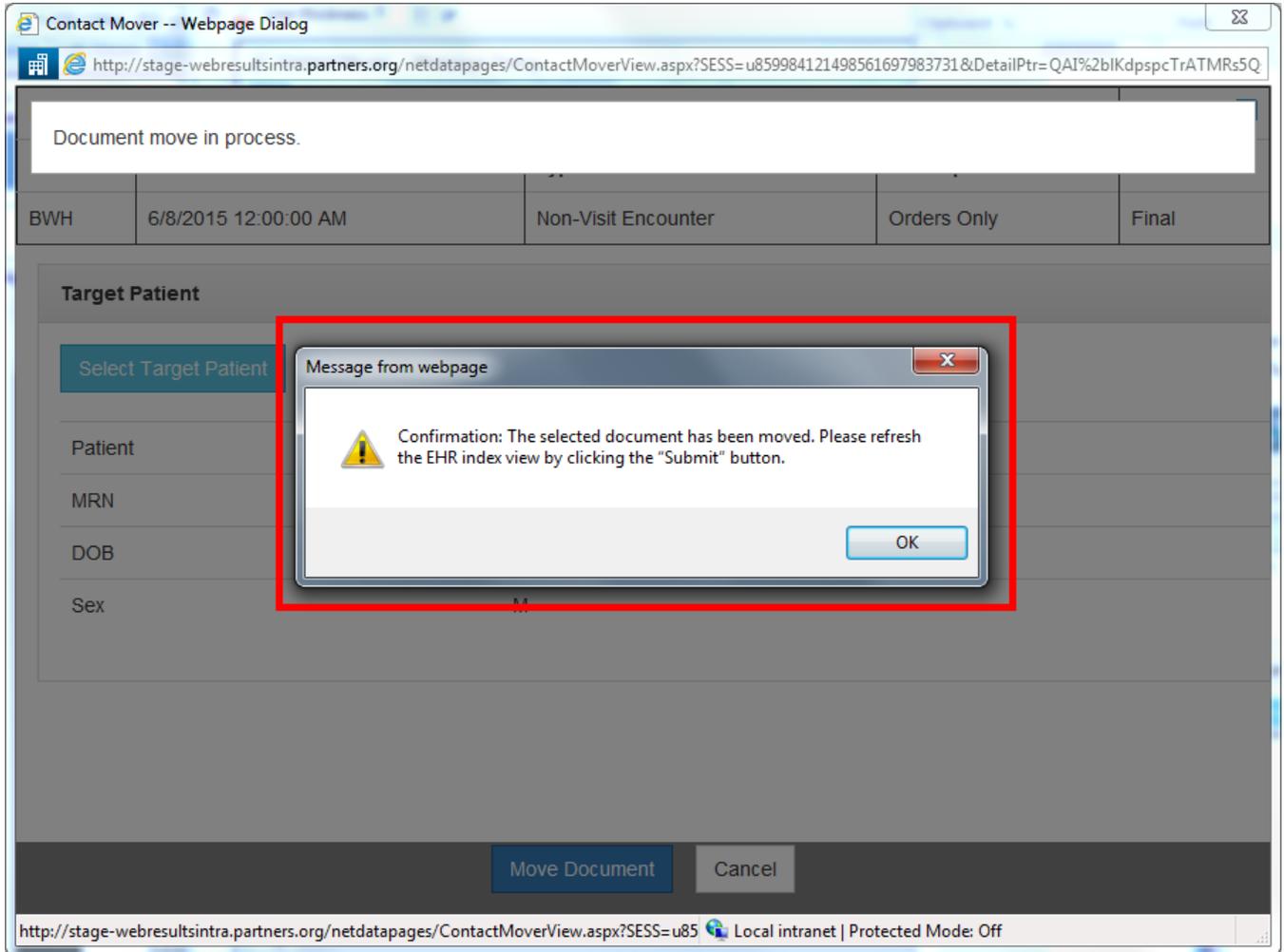
Select Target Patient

Patient	OE-TEST, MCGEORGE
MRN	97009343 (BWH)
DOB	12/19/1945
Sex	M

Move Document Cancel

http://stage-webresultsintra.partners.org/netdatapages/ContactMoverView.aspx?SESS=u85 Local intranet | Protected Mode: Off

12. Once the document has been moved another popup will appear confirming that the document has been moved successfully.



13. Click on 'OK' to the popup and then click on the 'Submit' button to refresh the data on the page.

The screenshot shows a web browser window displaying a medical record for a patient named Cupid, Abc (MR # 719/2017). The interface includes a navigation bar with options like 'Select', 'Lab Views', and 'Summary Views: Big Board'. A 'Submit' button is located in the top right corner of the main content area. A red arrow points to this button, and a red-bordered text box with the text 'Submit button to refresh the page' is overlaid on the button. The main content area displays patient information, including 'Reason for Visit', 'Diagnoses', 'Encounter-Level Documents', and 'ED Arrival Information'. The 'Diagnoses' section shows 'Pacemaker - Primary' with code 'Z95.0'. The 'Encounter-Level Documents' section shows 'Reason for Visit History' and 'Diagnoses'. The 'ED Arrival Information' section shows 'Pacemaker - Primary' with code 'Z95.0'. The 'Reason for Visit' section shows 'Reason for Visit History'. The 'Diagnoses' section shows 'Pacemaker - Primary' with code 'Z95.0'. The 'Progress Note' section shows 'No notes found.'. The 'Chart Review Routing History' section shows 'No Routing History on File'. The 'CC'd Chart Routing History' section shows 'None'. The 'Communication Routing History' section shows 'There are no sent or routed communications associated with this encounter.'. The 'Allergies as of 7/19/2017' section shows 'Not on File'. The 'Medical History' section shows 'None'. The 'Surgical History' section shows 'None'. The 'Socioeconomic' section shows 'None'. The 'Occupational' section shows 'None'. The 'Reviewed On: 5/10/2016 By: Technologist Cardiant' is also visible.

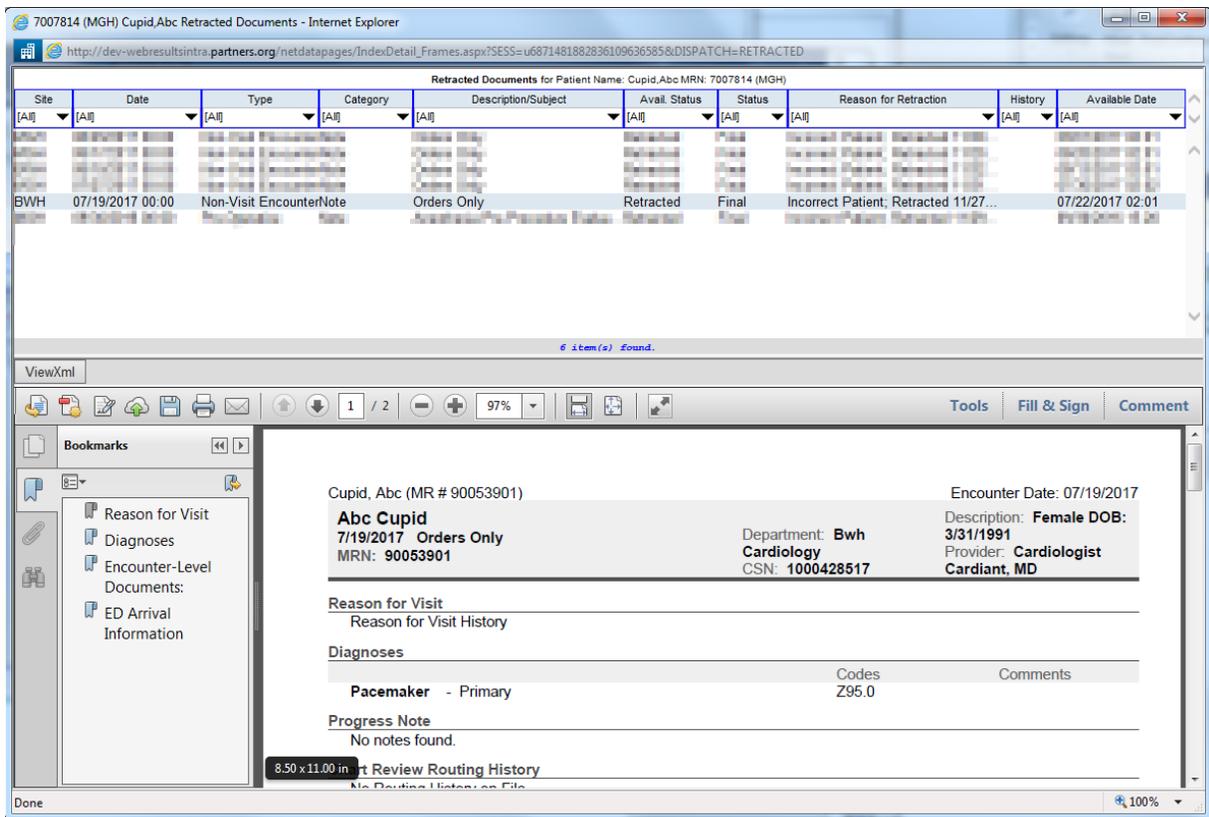
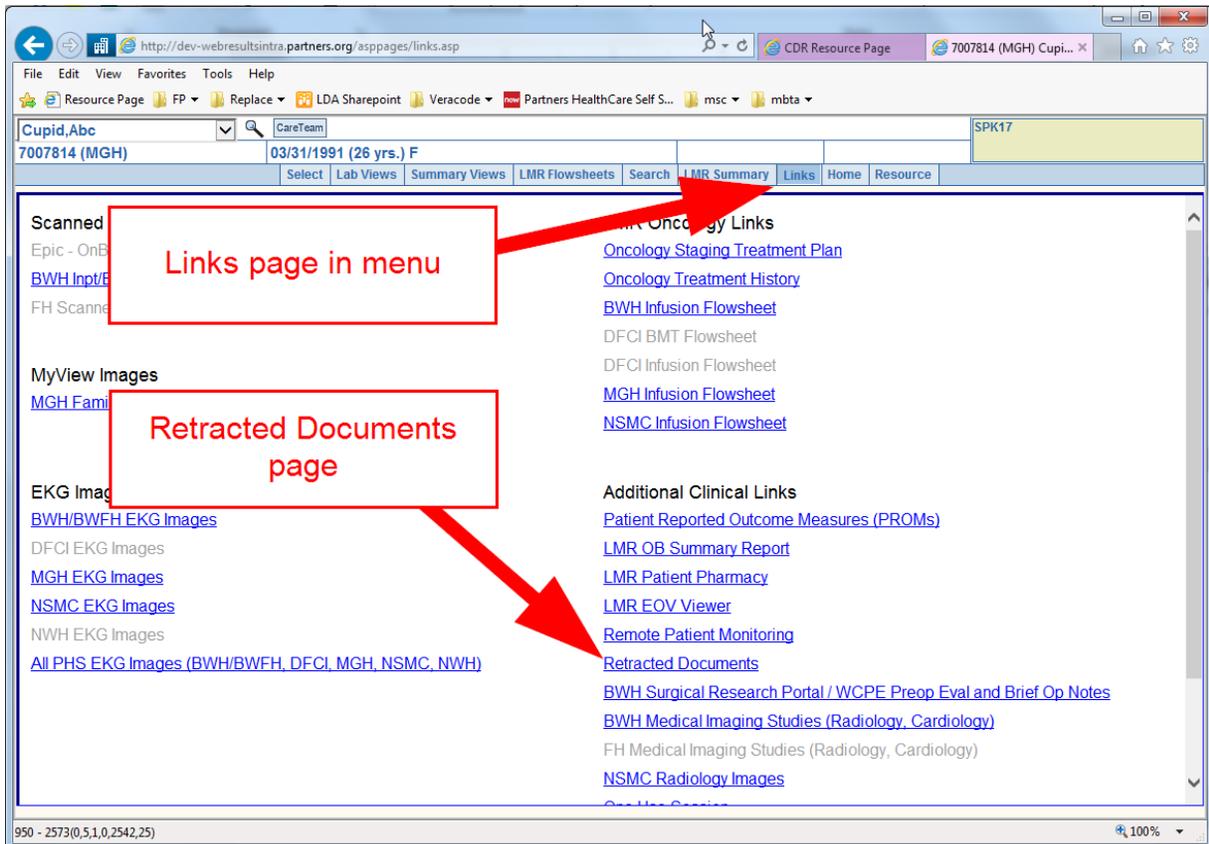
14. You will now see that the document no longer displays in the patients' chart

The screenshot displays a medical information system interface for a patient named Cupid, Abc (MR # 20446293). The patient's date of birth is 03/31/1991 (26 yrs.) F. The interface includes a navigation bar with options like 'List View', 'Chem', 'Imm', 'BBank', 'Path', 'OpRpt', 'Endosc', 'Note', and 'Scanned'. A central menu lists various document types such as 'Reason for Visit', 'Diagnoses', 'Problem List', 'All Flowsheets', 'Encounter-Level Documents', and 'ED Arrival Information'. The main content area shows a detailed view of a document titled 'Cupid, Abc (MR # 20446293)' dated 11/20/2017. This document includes patient information, a reason for visit, diagnoses (Pacemaker - Primary), progress notes, and in-office medications. The medications table is as follows:

Medication	Dose	Frequency	Start	End
sodium chloride (NS) 0.9 % syringe flush 3 mL	3 mL	As needed	9/26/2017	
Sig - Route: Inject 3 mL into the vein as needed for line care. - Intravenous				
sodium chloride 0.9% infusion	5-10 mL/hr	Continuous PRN	9/26/2017	
Sig - Route: Inject 5-10 mL/hr into the vein continuous pm for other (free text field) (KVO). - Intravenous				

The interface also shows a 'History' section on the left with a list of orders and notes from 11/09/2017 to 09/30/2016. The bottom status bar indicates '44 - 532(0,3,0,1,499,29)' and a zoom level of 100%.

15. The document will now display in the Retracted Documents page for that chart



16. Next go to the target patients chart to confirm that the document was moved

The screenshot shows a web browser window with the URL `http://dev-webresultsintra.partners.org/asp/ages/bb.asp`. The page title is "Big Board". The patient information at the top includes "Oe-Test, Mar" and "01/01/1958 (59 yrs.) F". Below this is a navigation bar with options like "Select", "Lab Views", "Summary Views: Big Board", "LMR Flowsheets", "Search", "LMR Summary", "Links", "Home", and "Resource".

A table of checkboxes is visible, including MGH, BWH, FH, DFCCI, NWH, SRN, ExtData, NSMC, MEEI, MVH, NCH, and ALL. Below this is a "List View" section with a grid of categories: Chem, Imm, BBank, Path, OpRpt, Endosc, Note, Scanned, Hem, Micro, Rad, Card, Disch, Pulm, Neuro, and Flowsheet. The "Imm" category is highlighted in blue.

The main content area is titled "Oe-Test, Mar" and contains a "START" and "FINISH" section. Below this is a "ViewXml" section with buttons for "Retrigger", "Retract", and "Retract". A "ContactMover" button is also present. The interface includes a toolbar with icons for printing, saving, and other actions, along with a "Tools", "Fill & Sign", and "Comment" menu.

A "Bookmarks" sidebar is visible on the left, listing items such as "Reason for Visit", "Diagnoses", "Encounter-Level Documents", and "ED Arrival Information". The main content area displays patient information for "Cupid, Abc (MR # 90053901)", including "Encounter Date: 07/19/2017", "Department: Bwh Cardiology", and "Provider: Cardiologist Cardiant, MD". It also shows "Reason for Visit", "Diagnoses", "Progress Note", "Chart Review Routing History", "CC'd Chart Routing History", "Communication Routing History", "Allergies as of 7/19/2017", "Medical History", "Surgical History", "Socioeconomic", "Occupational as of 7/19/2017", and "Socioeconomic as of 7/19/2017".

The status bar at the bottom left shows "372 - 866(1,2,1,0,830,32)" and the bottom right shows "100%".