

Step / Topic	U Drive workflow (OLD)	SharePoint workflow (NEW)
Creating an encounter	MA creates a Clinical Info note	Same as old workflow
Scan and save	Form is scanned into the U-Drive (folder is "Incoming Scanner).	Form is scanned into the staff member's H: drive (staff member should create a folder labelled "Scans") and then dragged to the desired SharePoint folder and deleted from the H: drive.
File naming convention	The file name should follow the naming standard: Date (MMDDYY), first 3 letters of the patient's last name, first 3 letters of the patient's first name.	Same as old workflow
Check out document	No process exists. MA fills out demographics etc, then RN fills in clinical info, then Provider completes.	Clinical staff check out the document to maintain version control while they are working on their part in completing the form. Responsibilities for which part of the form are completed are the same as the old workflow.
Handoff from MA to RN	MA sends encounter to the appropriate clinical pool alerting them that the fax/document is in the U-Drive provider folder.	
Informing provider	Clinical staff sends a message to provider in the Clinical Info encounter to make them aware that the form is in the U: Drive for completion and signature.	Same as the old workflow except replace "U: Drive" with "SharePoint"
Provider access	Providers access the U: Drive.	Providers access the SharePoint site via the Citrix Virtual Desktop (logging into Citrix from the Health Link

		(Citrix Gateway) link on the Pulse
Provider actions	Complete/sign the form. Add "DONE" and initials to the end of the file name. Places form in the DONE folder. Send Clinical Info Encounter back to the pool indicating that the form is done.	Complete/sign the form. Add 'DONE' and initials to the end of the file name. Send Clinical Info Encounter back to the pool indicating that the form is done.
Sending to HIM	MA puts form in "Send to HIM" folder on the U Drive.	MAs use Solarity
Deleting forms	MAs go back into provider's DONE folder to remove completed form.	Clinical staff delete downloaded documents after checking the revised form back into SharePoint.