

Institutional Handbook of Operating Procedures Policy 09.13.12	
Section: Clinical Policies	Responsible Vice President: SVP, Chief Medical & Clinical Innovation Officer
Subject: General Procedures	Responsible Entity: Clinic Administration

I. Title

Summary Lists for Ambulatory Patients (Epic Snap Shot)

II. Policy

1. The Epic Snap Shot shall be generated and maintained for each patient receiving continuing ambulatory care services.
2. Initiation and maintenance of the Epic Snap Shot is automated upon entry of the information into the record in the corresponding fields in Epic. Complete data entry shall be the responsibility of the health care provider. Select tasks may be delegated to unlicensed and nursing staff, as appropriate.
3. The Epic Snap Shot is generated at the patient's first visit with a health care provider (e.g., physician, nurse practitioner, physician assistant and nurses). The first visit is defined as the patient's first visit to UTMB for any ambulatory services (specialty or primary).
4. If a diagnosis cannot be established during the first visit, any other significant information should be documented on the Epic Snap Shot such as allergies, any medications, and significant patient history, or the provider may document none known.
5. The medication record is initiated at the first visit; if the patient has no medications it should be indicated on the form. Medications shall be reconciled at each encounter.
6. Epic Snap Shots shall be generated in an electronic format and maintained in the medical record.

III. Procedures

1. Use the appropriate Epic fields for documenting diagnoses problems/ conditions/significant operative and invasive procedures.
2. Update appropriate Epic fields new diagnosis, change in diagnosis, medications, allergies and/or whenever a procedure is performed, identified, resolved, or identified as recurring.
3. Record chronic problems.
4. Record surgical procedures.
5. Indicate known allergies. If there are no known allergies, write none. Reconcile allergies from outside sources.
6. Document reported and reconciled medications, including over-the-counter medications and herbals. Refer to medication reconciliation policy IHOP 9.13.30 and Ambulatory Non – IHOP Medication Reconciliation C59. If there are no medications, indicate no medications. Document preferred pharmacy.
7. Before treatment decisions are made, providers should review the snapshot information and click “mark as reviewed” to document their review of the record.

IV. Related UTMB Policies and Procedures

[IHOP 09.13.30 - Medication Reconciliation](#)

[C23 Intake and Assessment of Patients Presenting in Clinics](#)

C59 Medication Reconciliation**V. Dates Approved or Amended**

<i>Originated: 05/14/1994</i>	
<i>Reviewed with Changes</i>	<i>Reviewed without Changes</i>
08/15/2013	12/07/2016
05/13/2025	

VI. Contact Information

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