Do's and Don'ts of Scanning to Epic

Do not scan into EPIC

- Items that are irrelevant to the patient's care
- Driver's Licenses
- Insurance Cards
- Any Financial / Billing Documentation
- Documents that were printed from Invision, EPIC, MyUTMB or interfaced into EPIC
- Student Grades
- Last Will and Testament
- Tax returns
- Source Data (with some approved exceptions)

Some examples of Source Data are:

Radiology images

Ultrasounds

Psychology test data

Photographs

C-Arm Images

Electrophysiology Waveforms

If an authorization, consent, disclosure or agreement is **incomplete** it is NOT a valid document and should not be scanned into EPIC until it is completed.

External Provider Records

This tab is for all medical records from a Non-UTMB facility.

*Note: Use the **date uploaded** as the date of service for all external documentation.*

Request for Consult/Referral from Non-UTMB

One of the parties is a Non-UTMB provider.

Example: Tricare Military is asking UTMB to evaluate a patient

Example: A UTMB provider is requesting a consult from Mainland Center

UTMB Response/Request for Referral

Both parties are UTMB providers - A UTMB provider is requesting a Referral or Consult from UTMB where one of the areas is not currently on EPIC.

Example: Texas City Pedi to Ophthalmology (Ophthalmology is not on EPIC yet)

Do's and Don'ts of Scanning to Epic

TDH Lab Result (UTMB)/Lead vs. External Provider Records

- Results from TDH Lab that was requested by UTMB –
  TDH Lab – Use date collected as date of service
- Results from TDH Lab that was requested by Non-UTMB - External Provider Records

Home Health 485

This tab is for 3 specific documents -

- Home Health Certification and Plan of Care (Form HCFA – 485)
- Medical Update and Patient Information (Form HCFA – 486)
- Addendum to Plan of Care (Form HCFA - 487)

The title of these forms is located in the bottom left-hand corner of the document.

Home Health – Other

All other Home Health documentation except for DME/Supply Justification and Home Health 485,486,487.

Note: Tideway is not a Home Health agency

Patient Questionnaire

This tab is for questionnaires completed by the patient and for handwritten lists provided by the patient. Examples:

- Medications list provided by the patient
- Blood glucose readings provided by the patient
- Blood pressure readings
- Diet

Note: Do not place Connor's/Vanderbilt Parent Rating Scale or Connor's/Vanderbilt Teacher Rating Scale here.

Medical Release Forms

These forms allow or dismiss the patient from participation in activities based on their medical condition. Many times you will see this form from school districts. Work/School excuses go here.

Note: Do not place Authorization for Release of PHI forms here.

Do's and Don'ts of Scanning to Epic

Scanned Lab vs. External Provider Records

Results from Quest Diagnostics Lab that was requested by UTMB - Scanned Lab

Results from Quest Diagnostics Lab that was requested by a Non-UTMB provider – External Provider Records.

Advance Beneficiary Notice of Non-coverage (ABN)

This tab is only to be used for Medicare patients. *The IBN forms do not belong in the patient's chart.*

Authorization for Release of PHI vs. External Provider Records

A Non-UTMB facility is requesting our (UTMB) records – this goes to Authorization for Release of PHI (UTMB releasing to Mainland Center).

Requests from us (UTMB) to obtain a patient's records from another facility – this goes to External Provider Records (Mainland Center releasing to UTMB)

Connor's/Vanderbilt Parent Rating Scale and Connor's/Vanderbilt Teacher Rating Scale

These forms should be scanned separately under specified tab.

DME/Supply Justification

Durable Medical Equipment (DME) – some examples of DME items - oxygen concentrators, nebulizers, CPAP, catheters, hospital beds, wheelchairs, blood-testing strips and blood glucose monitors.

EKG

This tab is only for UTMB EKGs. Non-UTMB scans belong in External Provider Records.

Medication Correspondence

This tab is used for correspondence from pharmacies (Medco, Walgreens…).

Radiology Documentation

This tab is only to be used by Radiology.