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.