



# Scanning and Documentation Retrieval in Epic

UCONN Health

December 2018

# A friendly reminder about document scanning

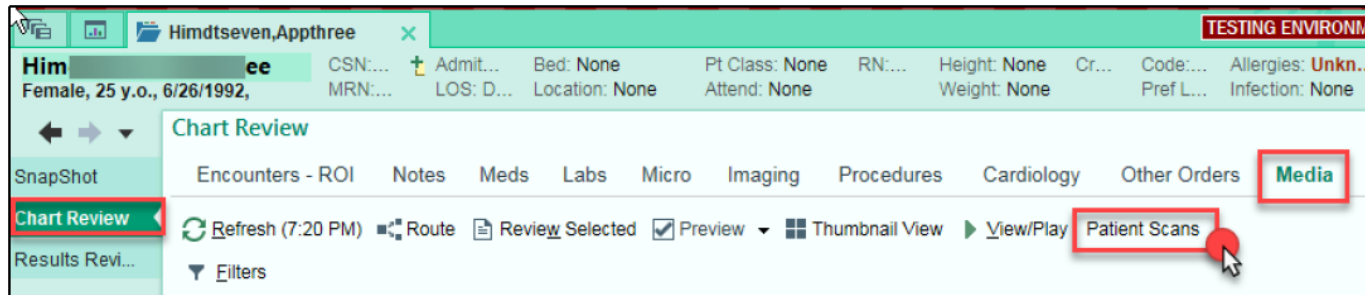
- Documents that are created in Epic and reside in Epic should not be printed and sent to HIM for scanning.
  - Some examples include EMG reports, face sheets, and e-signed consent forms.

# Locating scanned documents

- To view scanned documents within a patient's chart, use Chart Review.
  - Look up the patient record whose scans you need to view
  - Select the **Chart Review** activity tab
  - Click the **Media** tab of Chart Review to view scanned documents and *other* media information

# Find historical scanned documents **prior to go-live (4/28/18)** within Epic

- Look up patient record and open chart
- Select the **Chart Review** activity tab
- Click the **Media** tab of Chart Review
- Click **Patient Scans** button



The screenshot displays the Epic EMR interface for a patient named Himdtseven, Apptthree. The patient's information is shown at the top, including gender (Female, 25 y.o.), date of birth (6/26/1992), and various medical identifiers. The main area is the Chart Review tab, which is highlighted with a red box. Within this tab, the Media sub-tab is also highlighted with a red box. The Patient Scans button is located at the bottom right of the interface and is highlighted with a red box and a mouse cursor pointing to it.

# Chart Review: Using Filters

- **Use filters quickly locate scanned documents**
  - Expand the available **Filters** list
  - Choose from a **Filter type**
    - Select the specific criteria you want to filter (ex. EKG) – the system displays only your filtered criteria.
    - Click [hyperlink](#) ( in report) to view scanned image (this can be a document or esigned document)

# Chart Review: Using Filters

The screenshot displays the 'Chart Review' interface with several key elements highlighted by red boxes and numbered callouts:

- 1**: Refresh button in the top toolbar.
- 2**: 'Document Type' filter dropdown menu.
- 3**: 'EKG' filter option selected in the 'Document Type' list.
- 4**: 'Patient Scans' button in the top toolbar.
- 5**: 'Clear Filters' button in the top right.
- 6**: 'EKG - Scan on 5/4/2018 2:01 PM' entry in the 'Applied filters are:' section.
- 7**: A callout box pointing to a scan icon in the document list, stating: 'This icon represents a SCAN (file type)'.

The main document list is as follows:

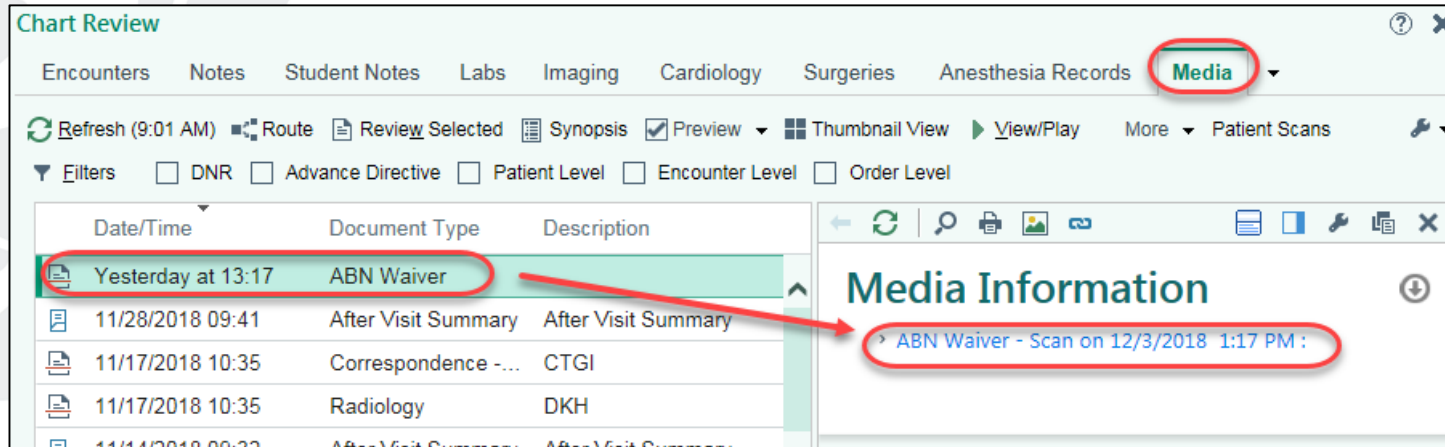
Date/Time	Document Type	Description	Enc Date
05/04/2018 2:01 PM	EKG		05/02/2018
05/03/2018 11:04 AM	EKG		05/01/2018

The 'Media Information' panel on the right shows the following details:

- Document Information:** EKG
- Attached To:** Hospital Encounter on 5/2/18
- Source Information:** Interface, Transcription Incoming

# Chart Review: Locate the ABN waiver

- To locate a scanned ABN waiver (patient-level), open **Chart Review**, click the **Media** tab, look for the document type, “ABN Waiver”



The screenshot displays the 'Chart Review' application interface. The 'Media' tab is selected in the top navigation bar. Below the navigation bar, there are various filters and options. A table lists documents with columns for Date/Time, Document Type, and Description. The first row is highlighted, showing 'Yesterday at 13:17' for Date/Time, 'ABN Waiver' for Document Type, and an empty Description. A red arrow points from this row to the 'Media Information' panel on the right, which displays the details for the selected document: 'ABN Waiver - Scan on 12/3/2018 1:17 PM:'.

Date/Time	Document Type	Description
Yesterday at 13:17	ABN Waiver	
11/28/2018 09:41	After Visit Summary	After Visit Summary
11/17/2018 10:35	Correspondence - ...	CTGI
11/17/2018 10:35	Radiology	DKH
11/14/2018 09:22	After Visit Summary	After Visit Summary

# Which scanned documents are in eHIMs only

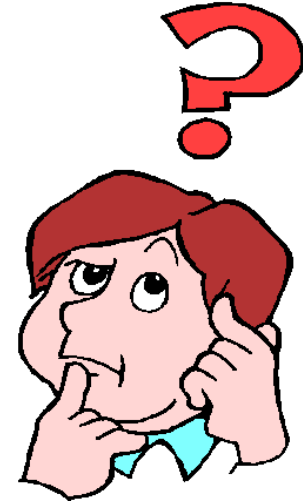
- Some documents types like...
  - Release of Information forms
  - FMLA, WC and/or Disability forms
  - Government, Travels and/or Utility forms

\*considered administrative forms filled out by our providers for the patient



# Not familiar with eHIMS?

- **Let's learn how to:**
  - Access eHIMs(webportal) via Epic
  - View documents for selected patient
  - Basic document review navigation



# Access eHIMs from within Epic

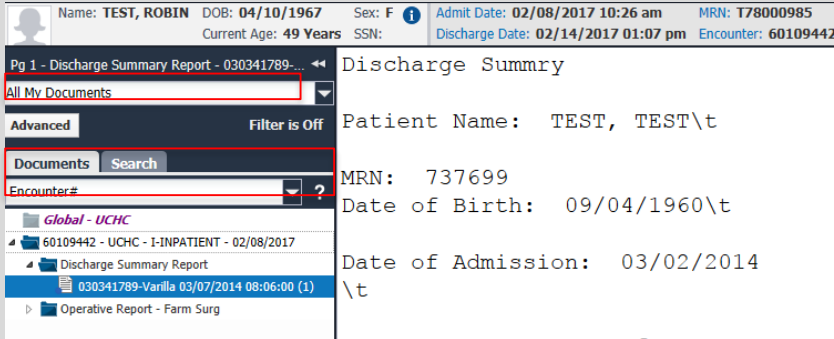
- **Access eHIMs:**
  - From within the patient's Epic record, select the **Chart Review** activity tab > **Media** tab > **Patient Scans** button
  - Once eHIMs launches, the patient record opens to the **Open Document viewer** for the selected records

The screenshot displays the Epic EMR interface for patient TEST, ROBIN. The header shows patient information: Name: TEST, ROBIN, DOB: 04/10/1967, Sex: F, Admit Date: 02/08/2017 10:26 am, MRN: T78000985, Current Age: 49 Years, SSN: [redacted], Discharge Date: 02/14/2017 01:07 pm, Encounter: 60109442. The left sidebar shows a document list under 'Global - UCHC' with the following items: 60109442 - UCHC - I-INPATIENT - 02/08/2017, Discharge Summary Report, 030341789-Varilla 03/07/2014 08:06:00 (1), and Operative Report - Farm Surg. The right pane shows the 'Discharge Summary' document viewer with the following text: Patient Name: TEST, TEST\t, MRN: 737699, Date of Birth: 09/04/1960\t, Date of Admission: 03/02/2014\t.

# View documents in eHIMs

All available documents for that encounter display on the left side the screen.

**View of documents may be changed based on user preference by clicking on the drop-down box and selecting a different view**



The screenshot displays a patient record for Robin Test. The patient information includes Name: TEST, ROBIN; DOB: 04/10/1967; Sex: F; Admit Date: 02/08/2017 10:26 am; MRN: T78000985; Current Age: 49 Years; SSN: [redacted]; Discharge Date: 02/14/2017 01:07 pm; Encounter: 60109442. The main content area shows a 'Discharge Summary' report. On the left sidebar, there is a 'Documents' section with a search bar and a list of documents. A red arrow points to the 'Documents' view selection in the sidebar. The list of documents includes:

- Global - UCHC
- 60109442 - UCHC - I-INPATIENT - 02/08/2017
- Discharge Summary Report
- 030341789-Varilla 03/07/2014 08:06:00 (1)
- Operative Report - Farm Surg

# View documents in eHIMs

- Click the folder icon to view contents of the document in the viewer to the right
- Documents list within folder
- Single-click on selected document to display in the viewer

The screenshot displays the eHIMs interface for patient TEST, ROBIN. The patient information includes DOB: 04/10/1967, Sex: F, Admit Date: 02/08/2017 10:26 am, MRN: T78000985, Facility: UCHC, Current Age: 49 Years, SSN, Discharge Date: 02/14/2017 01:07 pm, Encounter: 60109442, and GPI. The document list on the left shows a folder 'Global - UCHC' containing a sub-folder '60109442 - UCHC - I-INPATIENT - 02/08/2017'. Inside this folder, the document 'Discharge Summary Report' is selected and highlighted with a red box. Other documents in the folder include '030341789-Vanilla 03/07/2014 08:06:00 (1)' and 'Operative Report - Farm Surg'. The document preview on the right shows the title 'OPERATIVE REORT - FARM SURG' and the following text: Patient Name: TEST, TEST; MRN: 737699; Date of Birth: 09/04/1960; Date of Admission: 03/02/2014; TEST TEST TEST TEST of new type; Testing for outbound to LCR; Dictated By: Test, Test, MD; D: 02/27/2017 14 50 T: 02/27/2017 01 08 Job#: Electronically Authenticated by: TEST MD, TESTING On 02/28/2017 11:11 AM EST. A red circle highlights the document preview area.

Displays patient details

# VIEWER TOOLS

Displays Encounter Details

Task List Patients Census Documents Reports Admin Workflow

Name: TEST, SCARLET DOB: 11/10/2000 Sex: F Admit Date: 02/14/2017 01:12 pm MRN: T78000986 Facility: UCHC  
 Current Age: 16 Years SSN: Discharge Date: 02/14/2017 06:00 pm Encounter: 60109448 GPI:

Pg 1 - Operative Report - 735539648-Doctor UCONN HEALTH

All My Documents Filter is Off

Advanced MRV Documents Search

Encounter#

- Global - UCHC
  - 60109448 - UCHC - I-INPATIENT - 02/14/2017
    - Discharge Summary Report
    - 735538250-Doctor 03/21/2017 09:54:07 (3)
    - Admit Report
    - 735459940-Doctor 03/20/2017 16:10:26 (3)
    - Operative Report
    - 735539648-Doctor 03/21/2017 10:04:19 (3)

OPERATIVE REPORT

Name: Test, Scarlet MRN: T78000986  
 Birth: 11/10/2000 Date of Service:

OPERATIVE DIAGNOSIS:  
 OPERATIVE DIAGNOSIS:  
 PROCEDURE PERFORMED:

STUDY BY: Doctor, MD

HEADING: 1:  
 This is a M\*Modal format test. This test report was created without audio for format review. This is a test dictation. Of note, the headings and the content of the headings in this report are just to illustrate the format how the headings and content would look. The actual headings and content in the final report should be as dictated. Please review the test job and look good.

Active Viewer: Main Alt

ADI Upload Download

1 of 3

Enter minimum 2 characters to perform Search

Selected document

Viewer tool bar

Opens Viewer Tool Bar

Selected document in the viewer

Previous and next page or document

Search by word

# Need further assistance?

For additional questions/issues, please call the Call Center at x4400, option 1

