PURPOSE

Patient medical record paper documents necessary for quality patient care will be available in the electronic Health Record (EHR).

POLICY

- Every effort will be made to ensure the pertinent patient medical record paper documents will be scanned into the EHR prior to the patient visit as per the procedure section below.
- The paper chart will be pulled for the physician for the first patient visit on the EHR.
  - After reviewing the EHR record, the provider can tab additional documents for scanning if clearly needed for future visits.
- The paper chart will be pulled and placed in a holding area for easy access for the second patient visit on the EHR.
- For subsequent visits, the paper chart will be pulled by request only.
- Scanned documents will be marked with an EHR stamp with the date and initials of the scanner.
- The paper chart cover will be clearly marked with an EHR sticker when scanning is completed, preferably before the first EHR visit.
  - Loose documents coming in after the first EHR visit will be scanned and shredded.
- The paper chart will also contain a visit sticker indicating the number of visits since the implementation of the EHR.
- The paper chart and hard copy media will be stored as per Creighton University policy.

SCOPE

This policy applies to all CMA clinics

PROCEDURES

Scanning Active Patient Charts

The following documents will be scanned into the EHR if present in the paper chart:
- Information from the current & previous year as follows:
  - Outpatient labs
**Policies and Standards**

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- Diagnostic testing
  - Imaging reports, testing reports, etc.
- Consults
- Provider visits
- Anatomic pathology reports
- Growth charts as applicable
- Health maintenance reports
  - Mammography
  - Colonoscopy
- Immunization records
- All operative reports
- Specialty-pertinent diagnostic testing – greater than 2 years ago
- Pain management contracts
- Pertinent release of records

**Scanning Incoming Documents**

There are three areas where scanners may be located to scan loose documents:

- At the front desk
  - For insurance cards, photo IDs, HIPAA acknowledgments, consent to treat, etc.
  - Localized by site in a Medical Records area
  - Centralized by the organization at a specific site

Loose medical documents will be scanned into the EHR and tasked to the provider for electronic verification.

- Example – PET Scan result from another facility

**AND/OR**

Loose medical documents will be sent to the provider for review and signature **before** scanned into the EHR.

- Example – Large amount of documents from a patient or referring physician

The quantity of materials scanned will be monitored. Providers are encouraged to summarize or limit the quantity of scanned material.

*Internal Use Only*

*DRAFT*
Documents already verified by a CMA provider in the hospital setting will be electronically directed into the appropriate folder without additional electronic verification.

- Example – CUMC Discharge Summary – CMA provider is the attending physician
- Example – CUMC Consult – CMA provider is the consulting physician

Diagnostic testing results from external (non-CMA clinic) sources will be:

- Scanned into the EHR or electronically sent to the EHR and routed to the provider’s work list for review and electronic verification.
- In Outreach, the test result may be manually authenticated on the original document and then scanned into the EHR without additional electronic verification.
- EKGs performed in a CMA clinic (without an interface) may be interpreted and manually authenticated on the original document and scanned into the EHR without additional electronic verification.

ADMINISTRATION AND INTERPRETATIONS:

This policy shall be administered by the CMA Quality Office. Questions regarding this policy should be directed to the Quality Director at 280-5848, or via email at cmaqualityoffice@creighton.edu.

AMENDMENT/TERMINATION OF THIS POLICY:

Creighton Medical Associates (CMA) reserves the right to modify, amend or terminate this policy at any time. This policy does not constitute a contract between the CMA and its employees.

EXCEPTIONS: None

VIOLATIONS/ENFORCEMENT:

Any known violations of this policy should be reported to the CMA Quality Office at 280-5848 or via e-mail to cmaqualityoffice@creighton.edu. The University may advise law enforcement agencies when a criminal offense may have been committed.