
Scanning Documents Into EpiCare Using Media Manager

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Lesson Objectives

By the end of this lesson, you will be able to demonstrate the following:

- Organize and prepare document(s).
- Scan document(s) into Media Manager.
- Index scanned documents.
- Locate previously scanned document(s).
- Explain the Document Correction workflow.

Logging into EpiCare

1. Double click on the **EpiCare 2015** folder icon located on your computer's desktop.
2. Select **Epic OnBase Test**.
3. Enter your User ID and Password.



To scan using Media Manager, users must first have EpiCare access, which includes Health Information Management security. After completing all required EpiCare training, your User ID is active within 1-2 business days.

Scanning Recommended Best Practices

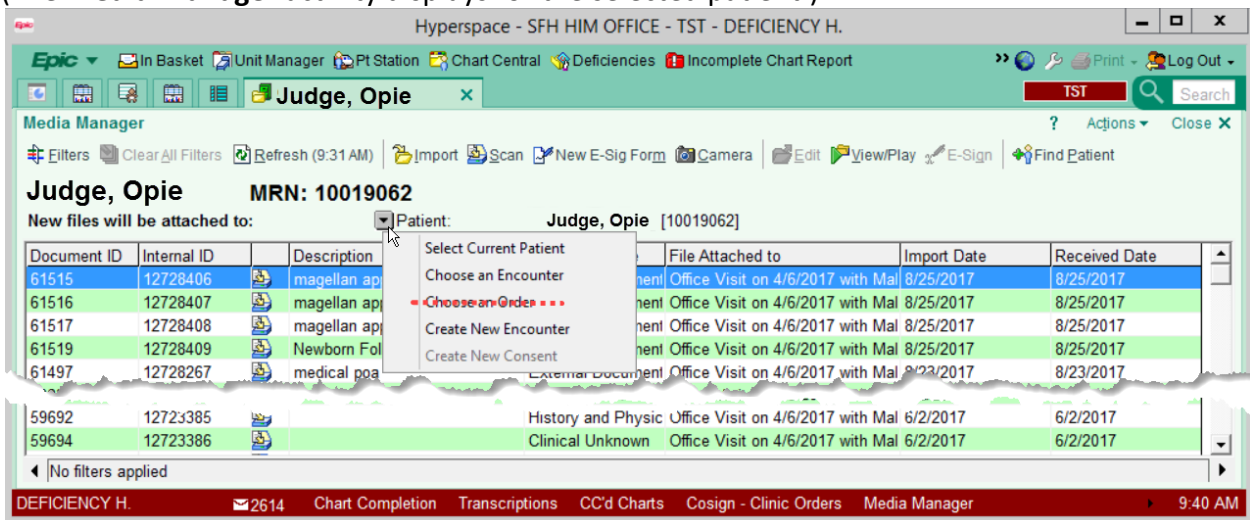
Prior to scanning, it is important to take the time and prepare your documents. Consider the following when organizing:

- ✓ Remove all staples, paper clips, etc.
- ✓ Place all pages of the document together.
 - Example: A 6-page History and Physical - All 6 pages should be in the appropriate page order.
- ✓ **IF applicable**, each page should have affixed an Epic-generated patient label with the appropriate CSN.
 - The label must be placed horizontally in the upper left-hand corner.
 - Each page must have only ONE patient label.
- ✓ Documentation received via fax or InBasket from EpiCare should not be scanned. The document already exists within EpiCare. These documents are easily identifiable; they will have a header displaying the Trinity Health of New England facility and the patient's name. When in doubt, check the Chart Review activity in EpiCare to determine if the documentation already exists. It is very important that we avoid duplicate documentation because of scanning.

Accessing the Media Manager Activity

4. On the Epic toolbar, select **Media Manager**.
 - If Media Manager is not on your toolbar follow the steps below, otherwise move to step 5.
 - Click the **Epic Button**.
 - Select **Patient Care**.
 - Select **Media Manager**.
5. In the **Patient Lookup** window, search and select your patient.

(The **Media Manager** activity displays for the selected patient.)



6. Click the downward pointing arrow to the left of the word **Patient**.
7. Make a selection based on the following criteria:
 - **Select Current Patient** – Used for documents that are patient related. Examples include patient ID's, consent forms, living wills and advance directives. The document will file to the Administrative Tab in Chart Review.
 - **Choose an Encounter** – Used to associate the document to one specific encounter. Examples include lab results, consults and H&P documents. The document will file to the Media tab in Chart
 - **Create New Encounter** – Used when scanning an outside document. These documents are not associated with an appointment. Examples include discharge summary and ambulance run documents. The document will file to the Outside Document tab in Chart Review.

i In your role, you will only be scanning to one of the three levels listed.

Depending on your selection, follow the next steps(s) that corresponds with A, B, or C to scan the document.

A. Select the Current Patient.

- a. Click on the drop down arrow and **Select Current Patient**.
- b. Click **Scan**.
- c. Go **Step 8**.

B. Choose an Encounter.

- a. Click on the drop down arrow and select **Choose an Encounter**.
- b. Select **Encounter**.

The **Encounter Selection** window open.

| Contact Date | Contact Type | Adm.Date | ExpctAdmit | Provider | Attending | Department | CSN |
|--------------|--------------------|------------|------------|----------------------|--------------------|-------------------------|--------------|
| 05/17/2017 | Scanned Document | | | NON, ST FRANCIS | | SFH HIM OFFICE | 100000224682 |
| 05/17/2017 | Scanned Document | | | NON, ST FRANCIS | | SFH HIM OFFICE | 100000224664 |
| 05/15/2017 | Hospital Encounter | 05/15/2017 | 05/15/2017 | | CARDIOTHORACIC ... | SMH CARDIOVASCULAR ... | 100000224369 |
| 05/15/2017 | Hospital Encounter | | 05/15/2017 | | GYNECOLOGY, PH... | SMH LABOR/DELIVERY L... | 100000224368 |
| 04/27/2017 | Scanned Document | | | NON, ST FRANCIS | | SFH HIM OFFICE | 100000220032 |
| 04/27/2017 | Scanned Document | | | NON, ST FRANCIS | | SFH HIM OFFICE | 100000220031 |
| 04/06/2017 | Office Visit | | | MALINICS, MICHAEL... | | FMG CARDIOLOGY EMAIN | 100000217660 |

- c. Click **Scan**.
- d. Go **Step 8**.

C. Create an Encounter.

- a. Click on the drop down arrow and select **Create an Encounter**.
- b. Complete all the fields in the **New Contact Window**.

New Contact for Judge, Opie

Contact date: **DATE on the DOCUMENT**

Contact type: Scanned Document

Provider: **PCP**

Department:

Create and Scan **Create and Import** **Create Encounter** **Cancel**

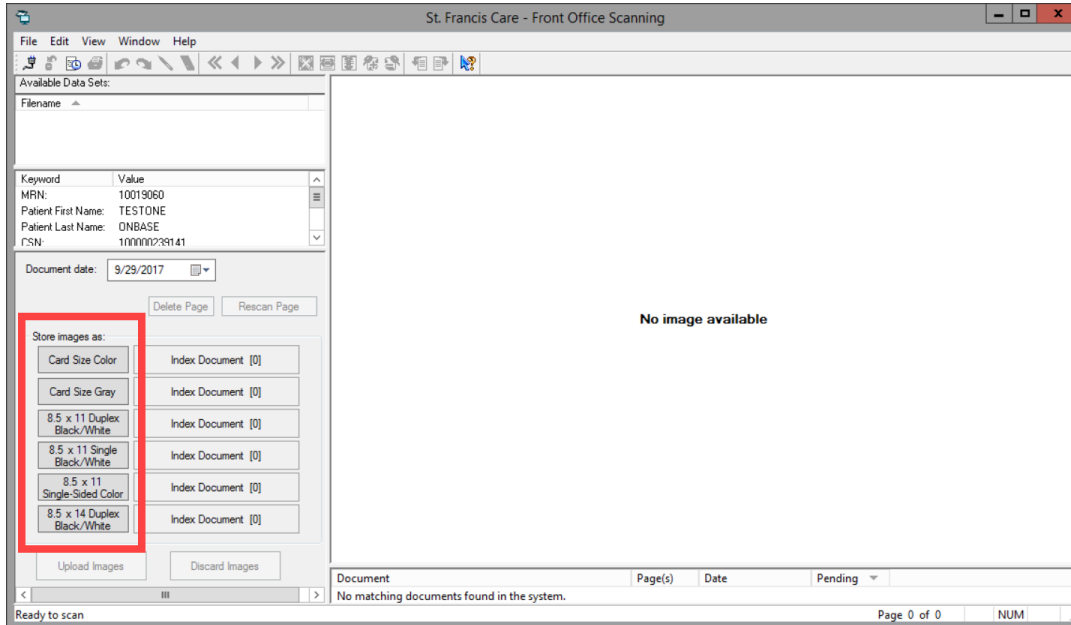
- c. Click **Create and Scan**.

Notice a phrase appears in blue font and is now hyperlinked.

New files will be attached to: Encounter: [Office Visit on 4/6/2017 with Malinics, Michael C. DO](#)

d. Go **Step 8**.

8. Place the document into the scanner; generally “face down, upside-down”.



9. Below the **Store images as:** header, select the characteristic that best describes the document.

- The scanner is now activated and the document will be scanned.



The scanner is configured to scan both sides of documents. If the reverse side of the document has marks, the scanner will consider this to be content. The result is two scanned pages. You should delete the blank page.



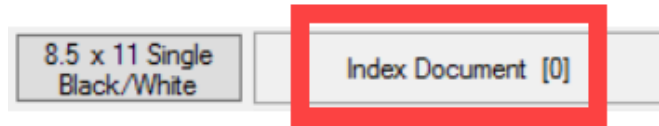
It is common practice that all documents be scanned Black/White, 8.5 x 11. Check with your office manager for additional directions.

Index the Document

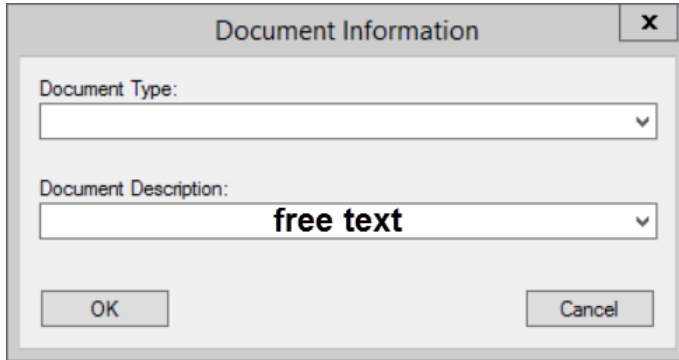


To “index a document” means to describe the document using patient information. A document type and other characteristics to each document.

10. Click **Index Document** beside the document characteristic selected.



11. Complete the **Document Information** window.



12. Click **Upload Image**.

- The document is now stored in OnBase and is viewable in both EpiCare and OnBase.

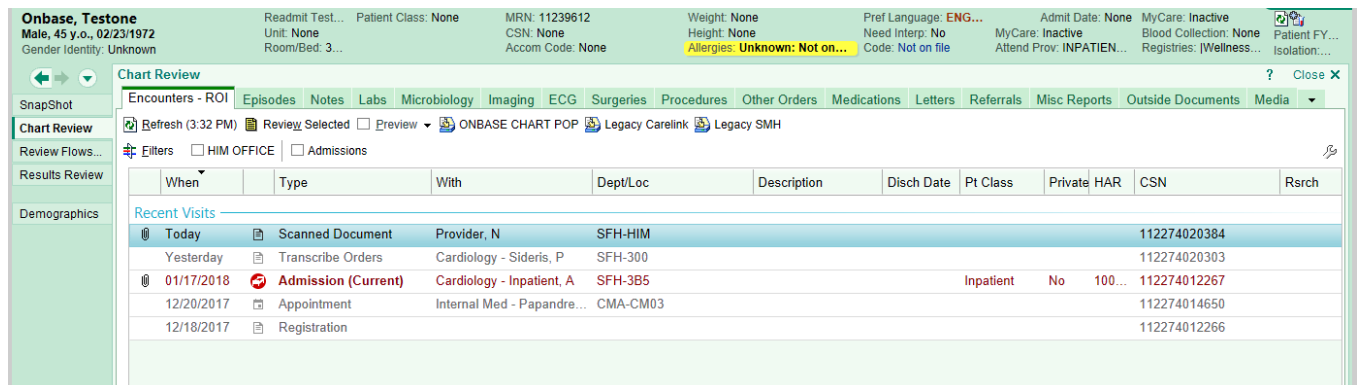
13. **Close** the window.

In the Media Manager activity, the document should be included in the list of encounters.

Marking a Document for Review

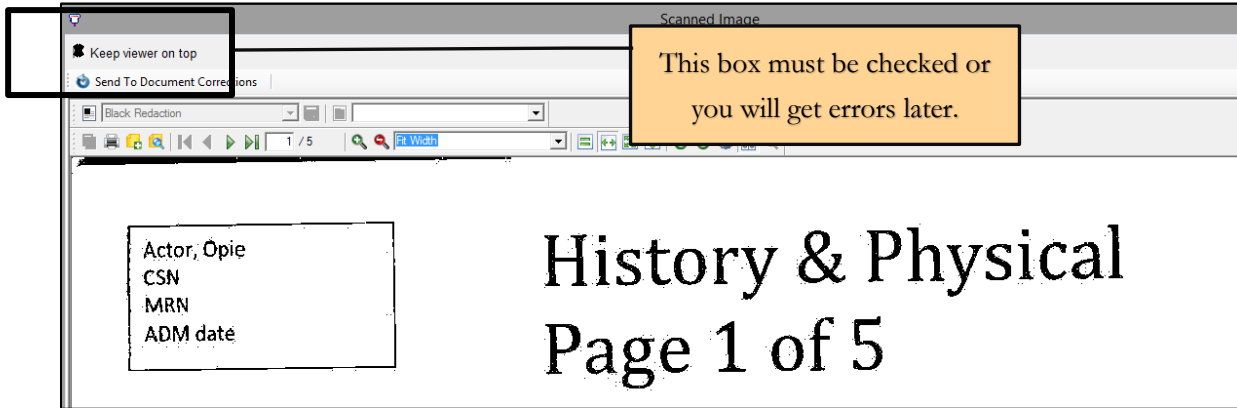
Viewing Scanned Documents

1. Go to **Epic Button**.
2. Scroll to **Patient Care**.
3. Click on **Chart**.
4. In the patient lookup window, search and select your patient.
5. Select the **Chart Review** Tab.



| When | Type | With | Dept/Loc | Description | Disch Date | Pt Class | Private | HAR | CSN | Rsrch |
|------------|---------------------|----------------------------|----------|-------------|------------|-----------|---------|--------|--------------|-------|
| Today | Scanned Document | | SFH-HIM | | | | | | 112274020384 | |
| Yesterday | Transcribe Orders | Cardiology - Sideris, P | SFH-300 | | | | | | 112274020303 | |
| 01/17/2018 | Admission (Current) | Cardiology - Inpatient, A | SFH-3B5 | | | Inpatient | No | 100... | 112274012267 | |
| 12/20/2017 | Appointment | Internal Med - Papandre... | CMA-CM03 | | | | | | 112274014650 | |
| 12/18/2017 | Registration | | | | | | | | 112274012266 | |

6. Select the **Media**.
7. Double click the document.
 - a. After a few moments, your document will load and be viewable.



8. Ensure the **Keep viewer on top** checkbox is selected.
9. Click **Send to Document Corrections**.
10. Enter information regarding the document correction request.

11. Click **Save**.

i Until this document correction is resolved, every time the document is opened, it will appear with the following message to indicate it is under review.

