

MyPractice Community

SCANNING SOP

Private offices

Scan only the last 2 years of records, unless it is a result that has significant clinical information.

- **Name and E#** must be on the TOP of each document that will be scanned
- All test results must be scanned into their **separate categories** (i.e. MRI, CT, Labs)
- Lab results should be separated into each category when at all possible (i.e. each category is on a separate page and does not continue on another page)
- Complete name must be on the document (newborn screening should have **legal name** written on)
- All pages of the same document type **AND** same description should be appended
- Records printed from EPIC do not get scanned (they are already part of the record)
- Prescriptions should be documented in EPIC, not scanned
- Documents should be kept for 2 weeks after scanning to ensure they get into EPIC
- Do not scan blank forms
- Delete blank pages during indexing
- Rotate pages to be **TOP-UP** during indexing
- Patient financial information should NOT be scanned
- Parent's photo ID CANNOT be scanned into the child's chart
- Insurance cards must have the PATIENT name on the document

INDEXING PATIENT LEVEL DOCUMENT USING MRN

1. The **Document Type** field: *****reference category list*****
 - Click the down arrow and a list of document types will display.
 - Double-click the one you need and it will populate.
2. Type in E# in the **Enterprise Number** field to index.
3. Press the Tab key and remaining keyword values will automatically populate.
4. Choose the **Description** (subcategory) from the drop down box. *****reference category list*****
5. Click **Index** and you will move to the next document in the batch.
 - Repeat steps 1-5 to index the document if the next page is a **new document**.
 - Click **Append** if the next page belongs to the **same document**.
6. When finished indexing, the document display will return to the Awaiting Index or Index in Progress queue.
7. Documents will automatically upload to Epic.

Document Type (Epic Placement)	Document Description	Examples	
EXTERNAL DOCUMENTS			
External Cardiacs (Cardiac Tab)	Cardiac Cath		
	Echo		
	EKG		
	Miscellaneous Cardiac	Cardiac Rehab, Holter / Event Monitor	
	Stress Test		
	Cardiac Procedure		
	Cardiac EP		
External Clinical Documents (Scanned Doc)	Consultation	Use for any specialty not listed, including Family / Internal Med	
<i>"Consultation" includes Progress Notes</i>	Consultation - Allergy		
	Consultation - Anesthesia / Pain		
	Consultation - Cardiology		
	Consultation - Chemotherapy		
	Consultation - Dermatology		
	Consultation - Endocrinology		
	Consultation - Emergency Medicine		
	Consultation - ENT (Ear, Nose and Throat)		
	Consultation - Genetics		
	Consultation - General Surgery		
	Consultation - GI (Gastroenterology)		
	Consultation - GU (Genitourinary / Urology)		
	Consultation - Hematology / Oncology		
	Consultation - ID (Infectious Disease)		
	Consultation - Nephrology / Renal		
	Consultation - Neurology		
	Consultation - Neurology / Neurosurgery		
	Consultation - Nutrition		
	Consultation - OB / GYN		
	Consultation - Ophthalmology		
	Consultation - Orthopedics		
	Consultation - Podiatry		
	Consultation - Plastic Surgery		
	Consultation - PT / OT / Speech		
	Consultation - Pulmonary		
	Consultation - Radiation Therapy		
	Consultation - Rheumatology		
	Consultation - Vascular Medicine / Vascular Surgery		
	Discharge Summary		
	Immunizations		
	Miscellaneous Clinical Documents	Home BP Logs, Home Blood Sugar Logs, Admit Notification, Patient Medical History Forms	
	Newborn Documentation		
	Orders	CMN,DME, Home Health Order	
	Infusion	Infusion Treatment record	
	PreSurgical Documents	Surgical Clearance Requests / Letters	
External Correspondence (Scanned Doc)	Consent forms	Consent to Treatment, HIPAA, Records Release, Generally anything signed by patient	
	Disability	FMLA Forms, Social Security - Disability Forms	
	Home Care	Home Health Care	
	Insurance	Correspondence from Insurance, Prior Authorization Request / Determination, Referrals	
	Insurance cards		
	Letters	Letters to / from the patient that are not already in Epic	
	Miscellaneous correspondence	Patient Registration Forms, Price Quotes	
	Oral Chemo Forms		
	Photo Identification	Drivers License, State Photo ID's (patients only)	
External Imaging (Imaging Tab)	Bone Density		
	CT Scan		
	Mammography		
	MRI		
	Ophthalmology		
	Ultrasound		
	X-ray	KUB, Plain Films	
	PET		
	Miscellaneous Imaging	HIDA Scan, Nuclear Imaging, IVP	
External H&P	History and Physical	OSHAA Sports Form; School Physicals with Clinical Information	
External Labs (Lab Tab)	Chemistry	Blood Sugar reading from another office, BMP, CMP, Hepatic, Lipid, TSH	
	RESULTS ONLY	PAP	
	<i>If all components on the page fall into one category, index separately.</i>	Genetics	
		Hematology	CBC, PT/INR
		Microbiology	Urine Culture, Wound Culture
	<i>If all components on the page fall into multiple categories, append together as Misc.</i>	Miscellaneous lab	Multiple categories on the same page or component not listed
		Pathology	
	COVID		
	Cologuard		
External Procedures (Proc Tab)	Audiogram/ENT	Any ENT procedure	
	GI		
	GU	Cystoscopy, Urology PVR, VFR	
	Neurology	EEG, EMG	
	OB/ GYN		
	Ophthalmology		
	Orthopedics		
	Pulmonary	Peak Flow, PFT, Spirometry	
	Miscellaneous Procedures	Colposcopy, Post OP Notes, Vascular PVR	
	Colonoscopy		
	Sleep Studies	CPAP Titration, Polysomnography (PSG)	
	EGD		
	External Advanced Directives		Living Will, POA NO DNR
External Psych Documents (Scanned Doc)	Psych External Documents (Viewable by anyone with Epic access)		
Care Everywhere Authorization	Used when receiving consent from patient to share records through Care Everywhere.		

Updated 2/25/21

LAB DESCRIPTION CATEGORIES

CHEMISTRY			
Alanine Aminotransferase (ALT)	Creatine Kinase (CK)	Lead	Thyroid Stimulating Hormone (TSH)
Albumin	Creatine Kinase-MB (CKMB)	Lipase	TIBC
Alkaline Phosphatase	Creatinine	Lipid Panel	Transferrin
Ammonia	Electrolyte Panel	Luteinizing Hormone (LH)	Triglycerides
Amylase	Estradiol	Magnesium	Troponin
Aspartate Aminotransferase (AST)	Ferritin	Microalbumin	Ultra-Sensitive CRP
B2 Microglobulin	Folic Acid	NT Pro BNP	Unsaturated Iron Binding Cap. (UIBC)
Basic Metabolic Panel (BMP)	Follicle Stimulating Hormone (FSH)	Parathyroid Hormone (PTH)	Uric Acid
Beta Hydroxybutyrate (BHB)	FT3 Thyroxine	Phosphorus	Urinalysis
Bilirubin, Direct	FT4 Thyroxine	Potassium	Urine Toxicology Screen
Bilirubin, Total	Gamma Glutamyltransferase (GGT)	Prealbumin	Vitamin B 12
Blood Urea Nitrogen (BUN)	Glucose Fasting	Progesterone	Vitamin D 25 Hydroxy
Brain Natureic Peptide (BNP)	Glucose Random	Prolactin	
C Reactive Protein	Haptoglobin	Protein, Total	
C3 Complement	HCG Qualitative	Prostate Specific Antigen (PSA)	
C4 Complement	HCG Quantitative	Renal Function Panel	
CA 125	HDL Cholesterol	Rheumatoid Factor	
CA 153	Hemoglobin A1C	Sex Hormone Binding Globulin (SHBG)	
Calcium	Hepatic Function Panel	Sodium	
Carbon Dioxide	Ionized Calcium	T Uptake	
Chloride	Iron & TIBC	T3 Triiodothyronine	
Cholesterol	Lactate Dehydrogenase (LDH)	T4 Thyroxine	
Complete Metabolic Panel (CMP)	LDL Cholesterol, Direct	Testosterone, Total	
CYTOLOGY			
Fine Needle Aspirate	Pap Smear		
HEMATOLOGY			
Activated Prothrombin	Hematocrit	Prothrombin Time	
CBC with Diff	Hemoglobin	Reticulocyte Count	
Fibrinogen	Platelet Count	Western Sedimentation Rate	
MICROBIOLOGY			
BK Virus Quant	Fecal Fat, Qualitative	Influenza A&B	Strep Group B
Blood Culture	Fecal Leukocytes	Ova and Parasite Screen	Trichomonas Prep
C. Diff. Toxin	Fecal Occult Blood	Rotavirus Antigen Detection	Urine culture
CG/Amplification	Fungus Culture	Respiratory Syncytial Virus (RSV)	Varicella Zoster DFA Smear
CG/Chlamydia	Group B Strep Vaginal	Stool Culture	Wound Culture
Culture, Herpes	HPV DNA Assay	Strep Group A	
MISCELLANEOUS			
Acetaminophen	Dilantin (Phenytoin)	Lithium	RPR
ANA Titer	EBV Antibody Panel	Lyme EIA Screen	Rubella IgG
Antibody Screen	EBV IgG, IgM	Mone Heterophile AB	Rubeola IgG
ASO Titer	Hepatitis B (ab)	Mono Slide Test	Salicylate
Blood Type, ABO	Hepatitis B (ag)	Mycophenolic Acid	Tegretol (Carbamazepine)
Blood Type, RH	Hepatitis B Core (IgM)	Mycoplasma Pneumoniae-IgM, igG	Theophylline
Carcinoembryonic Antigen (CEA)	Hepatitis B Core (Total)	Phenobarbitol	Valproic Acid
CMV	HIV 1 ab	Prenatal Anitbody Screen	Vancomycin
Cortisol	HIV 1&2	Procalcitonin	
Digoxin	HIV 2 ab	Quad Screen	
PATHOLOGY			
Colposcopy	Surgical Biopsies		
COLOGAURD			
COVID			