

Scanning Point of Care

Northwell is using Epic integrated with Hyland OnBase to support scanning workflows in the system. When you select the **Scan** button in Epic, it will launch an OnBase Front Office Scanning window which will allow you to import or scan (from a connected scanner).



Who can scan?



Many hospital-based areas will use post discharge HIM processes for scanning like they do today. Some clinics have a vendor that performs scanning for them. For roles in other locations, you will have access to scan to document types that are appropriate for your role.

How will I be trained and supported?

If as a part of your role, you perform scanning functions, there is an e-learning available on Cornerstone: **Epic_Front Desk and Clinical Document Scanning (Non-HIM)**. If you need to scan, make sure you watch this e-learning for how to import or acquire a scan. *If you do not have access to the scanning function and require this to perform your job function, you will need to add the job function of HIM Centralized Scanner and complete this e-learning.*



Scan Viewing



Scans are viewable from the Media tab in Chart Review or from many other workflows. A thumbnail preview will be viewable, or you can click on the link to launch the full viewer.

Additional Resources

- Epic Tip Sheet(s) will be available for additional education on Epic's Learning Home

Link to Epic Tipsheet	Short Description
Media Manager - Chart Correction for Scanned Documents	If a document appears in the Media Manager and requires modification, the user will need to utilize the Chart Correction button.
Media Manager - Scan Multiple	Media Manager allows multiple documents to be scanned at one time.
Media Manager - Scanning and Importing	The tipsheet reviews the steps to scan and import in Epic.
OnBase Tip Sheet Scan Registration Documents in Epic	The instructions on this tipsheet will instruct a user how to process the scanning of insurance cards, photo ids and other relevant documents to be scanned.

- Epic One Pagers

Link to Epic One Pagers	Short Description
Document Scanning - HIM	HIM Scanning Users/Designee and ambulatory sites utilizing central indexing
Document Scanning - Outside Hospital HIM	Locations scanning documentation outside of the hospital HIM departments including but not limited to: Ambulatory sites not centralized for indexing, utilizing electronic faxing & batch scanning capability, Imaging, Rehab, Home Care, and Hospice.
Adoption Point One Pager - Document Scanning_POS Scanning.docx	Non-HIM users in hospital settings and ambulatory sites not centralized for indexing

- OnBase Tipsheets

Link to OnBase Tip Sheet	Short Description
Tip Sheet - OnBase SaaS - PROD - Local Client Access.pdf	How to access and log into OnBase Unity through local desktop installation.
Tip Sheet - OnBase SaaS - PROD - Citrix Access.pdf	How to access and log into OnBase Unity through Citrix.

Link to OnBase Tip Sheet	Short Description
TipSheet - OnBase-Registering Your Workstation for Scanning.pdf	How to set up your workstation for OnBase Unity Scanning. One time process. Does not need to be done for Epic users.
TipSheet - Scan Source and Scan Format Explained.pdf	How to use the scan source and scan format drop downs in OnBase Unity.
Tip Sheet - Clinical - Submitting a Document Correction Request from the Epic Registration Module.pdf	How to submit a document for corrections through Epic Registration screens.
Tip Sheet - Clinical - Submitting a Request for Healthcare Corrections.pdf	How to submit a document for corrections anywhere in Epic.
Tip Sheet - Home Health Orders - Indexing.pdf	How to navigate Home Health workflows in OnBase Unity including indexing and custom queries.
Tip Sheet - Hospital HIM - Barcode Batch Scanning.pdf	How to batch scan documents using barcodes, directly into OnBase Unity in a Hospital setting
Tip Sheet - Hospital HIM - General Batch Scanning.pdf	How to batch scan documents without barcodes, directly into OnBase Unity in a Hospital setting
Tip Sheet - HIM Hospital - Indexing.pdf	How to index documents in OnBase Unity in a Hospital setting.
Tip Sheet - HIM Sweep - Import - Virtual Print Driver.pdf	How to Sweep, Import, and use the Virtual Print Driver to import documents into OnBase Unity.
Tip Sheet - Signature Deficiency - HIM and Physician.pdf	How to navigate signature deficiency including HIM and Physician workflows.
Tip Sheet - Ambulatory - Barcode Batch Scanning.pdf	How to batch scan documents using barcodes, directly into OnBase Unity in an Ambulatory setting
Tip Sheet - Ambulatory - General Batch Scanning.pdf	How to batch scan documents without barcodes, directly into OnBase Unity in an Ambulatory setting
Tip Sheet - HIM Ambulatory - Indexing.pdf	How to index documents in OnBase Unity in an Ambulatory setting.
Tip Sheet - HIM Sweep - Import - Virtual Print Driver.pdf	How to Sweep, Import, and use the Virtual Print Driver to import documents into OnBase Unity.
Tip Sheet - Index Inbound Faxes.pdf	How to index inbound faxes in OnBase Unity.
Tip Sheet - Clinical - Annotations and Redactions in OnBase Unity.pdf	How to navigate the workflow for annotations and redactions in an Ambulatory setting.
Tip Sheet - Signature Deficiency - HIM and Physician.pdf	How to navigate signature deficiency including HIM and Physician workflows.
Tip Sheet - HIM Working Healthcare Corrections.pdf	How to navigate the workflow for Healthcare Corrections. HIM Admins on HCC team Only.
TipSheet - HIM-Setting up OnBase Window for Healthcare Corrections or Unmerge WF.pdf	How to set up your OnBase Unity window for HCC or Unmerge workflow. HIM Admins Only.

Link to OnBase Tip Sheet	Short Description
Tip Sheet - Providers - Signing or Acknowledging a Document in Epic.pdf	How to sign or acknowledge a document in Epic.
Tip Sheet - Providers- Hyland Clinician Window.pdf	How to navigate the Hyland Clinician Window Tab in Epic.
Tip Sheet - Signature Deficiency - HIM and Physician.pdf	How to navigate signature deficiency including HIM and Physician workflows.
Tip Sheet - Billing - DocPop Integration with Epic.pdf	How to navigate the DocPop buttons in Epic Resolute to find billing correspondence.
Tip Sheet - Billing - Indexing.pdf	How to index billing correspondence in OnBase Unity.
Tip Sheet - Billing - Moving Lockbox Correspondence to a Different Scan Queue.pdf	How to move billing correspondence to a different scan queue in OnBase Unity.
Tip Sheet - Billing-Sweep-Import-VirtualPrintDriver.pdf	How to Sweep, Import, and use the Virtual Print Driver to import billing correspondence into OnBase Unity.
OnBase Tip Sheet Scan Registration Documents in Epic.pdf	Tip sheet for registrars/schedulers using Prelude and Cadence to scan documents.