

CAROLINA FAMILY HEALTH CENTERS, INC. PROCEDURE



MANUAL: Volume II

SUBJECT PROCEDURE: Filing Documents into the Electronic Medical Record

NUMBER: HIT-106P

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EFFECTIVE DATE: September 2013

SECTION: Health Information Technology

REVIEWED: 08/14; 04/15, 9/17

REFERENCE POLICY: N/A

RESPONSIBILITY: Chief Operating Officer

APPROVAL DATE:

APPROVED

I. PURPOSE

The purpose of this procedure is to outline where Carolina Family Health Centers, Inc. (CFHC, Inc.) documents should be filed in the electronic medical record when scanned into the system.

II. PROCEDURE

The following is a list of the Clinical and Administrative documents found in the electronic medical records for each client. Under each header is a description of the documents or forms found under each section.

CLINICAL FOLDERS

ACAP

- Custom notes created by the ACAP team

ADAP

- Custom notes created by the Special Populations Eligibility Specialist
- ADAP approval letters
- ADAP RW Authorization

ADHD Assessment Forms

Advance Directives

Attestation Statement

- Services provided/ordered need authentication from the provider

Behavioral Health

- Behavioral Health Screening forms
- No Harm Contract

Case Management

- Case management intake and assessment forms
- Case management release of information forms
- Case Management signature pages
- Lead based paint acknowledgement form
- Region 8 Network request for EFA from
- CFHC Region 8 Network Denial or Termination of Services form

- Ryan White Part C/B Patient Revenue Gas Card Request Form
- Region 8 Network Transportation Request Form
- Travel Reimbursement Outside Region 8 Network form
- Travel Reimbursement Within Region 8 Network form
- CAREWare Permission to Disclose Health Information form
- Support Group Contract
- Housing search guidelines
- Landlord notification of client enrollment or change
- Landlord utility payment request form
- CFHC HOPWA Housing Stability Plan

Chronic Care Management

- Chronic Care Management Consent

Consult Allergy Immunology

- Allergy consults

Consult Cardiology

- Cardiology consults
- Cardiovascular surgery
- Stress tests
- Echocardiograms
- Other cardiac imaging or studies

Consult Chiropractor

- Chiropractor consults

Consult Dentistry

- Dental consults

Consult Dermatology

- Dermatology consults

Consult Endocrinology

- Endocrinology consults

Consult ENT

- ENT consults

Consult Genetics Counseling

- Screening for genetic testing/counseling

Consult GI/Hepatology

- GI consults
- Hepatology consults
- Colonoscopies
- Endoscopies

Consult Health Department/Public Health

- Consult to or from health department or public health

Consult Hematology/Oncology

- Hematology Consult
- Oncology Consults

Consult Infectious Disease**Consult Internal Medicine****Consult Nephrology**

- Nephrology consult

Consult Neurology

- Neurology consults
- EEG

Consult Neurosurgery

- Neurosurgery consults

Consult Ob/GYN

- Ob/Gyn consults

Consult Ophthalmology

- Ophthalmology consults
- Eye Exams

Consult Orthopedics

- Orthopedic consults

Consult Pain Management

- Pain Management consults

Consult Pediatric

- Pediatric consults

Consult Podiatry

- Podiatry consults

Consult Psychiatrist

- Psychiatric consults from outside agencies

Consult Pulmonology

- Pulmonology consults
- Sleep studies
- Pulmonary function tests
- O2, C-PAP or other pulmonary order
- Other Pulmonology studies

Consult Rheumatology

- Rheumatology consults

Consult Surgery

- Surgery consults

Consult Urology

- Urology consults

Consult Vascular Surgery

- Vascular surgery consult

Consult Wound Care

- Wound care consults

Copies of Records Released

- Copy of fax cover sheet and patient chart report of records released

Correspondence

- Letters sent to the patients
- *Template generated correspondences or letters*

Death Certificate

- Copy of patient death certificate

Department of Corrections**Diabetes Education**

- Patient/Provider Contracts

Diabetes Meter Downloads

- Diabetes Meter Downloads

Diabetic Foot Exam

- Foot exam documentation

Diabetic Shoes**Diabetic Testing Supplies****Disability Placard****Do Not Resuscitate Order****EKG**

- Copies of Electrocardiograms (ECG)

Family Medical Leave Act**FitBit**

- FitBit information download

FL2 Forms

Health History Form

- Adult Health History forms
- Pediatric Health History forms

History and Physical

- *Template generated orders note*

Home Health/Nursing Home

- Forms from home health

Home Health Services Certification**Hospital Admissions and Discharge**

- Hospital admissions documents (History and physicals, admission notes, specialty consults and discharge instructions). *Labs and imaging studies should be placed in their respective folders and not placed under the Hospital Admission folders.*

Hospital ER visits

- ED visit information. *Labs and imaging studies should be placed in their respective folders and not placed under the ED Admission folders.*

Immediate or Urgent Care

- Immediate/urgent care visit

Immigration

- Immigration physical form

NCIR report (needs to be recorded under Immunizations)**Immunizations**

- Copy of NCIR immunization record
- Other immunization records

Inbound Electronic Lab

- Lab results sent from Labcorp into Greenway through the Emdeon bi-directional interface

Insurance Prior Authorization

- Insurance Prior authorization forms

Laboratory

- Labs from outside sources (hospitals, previous providers, etc.)
- Pathology reports
- Cultures

Mammogram**MAP Medication Assistance Program****Medical Equipment****Medical Records Requests****Medical Supply Requests**

Medicare Exam Forms

Medicare Part D

Medication co-signs

- All copies of cosigned prescriptions

Medication Prior Authorization

- Copies medication of prior authorization paperwork

Mini Mental State Exam – Dementia/Alzheimer's testing form

Miscellaneous

- All other documents not specified elsewhere

Nurses Notes

Nutrition Assessment

Orders note

- *Template generated orders note*

OT/PT/Speech Therapy

- Occupational therapy notes or orders
- Physical therapy notes or orders
- Speech therapy records

Pain Management Contract

Pap Smears

- Old pap smear reports from CFHC
- All Pap smear results

Patient Assistance Program

- Patient assistant form
- MAP forms – There is a MAP folder also

Pediatric Growth Chart

- Head circumference

Personal Care Services

Phone Messages

- Documented phone messages

PHQ-9 Forms

- PHQ9 depression screening forms

Physical Exam DOT/CDL

- DOT/CDL physical forms complete

Physical Exam Miscellaneous

- Disability paper

- Biometric screening forms
- Other physical forms

Physical Exam School or College

- Completed school, camp, sports or college physical forms

Physical Exam Work PE

- Completed work physical exam forms

Prescription Refill Request

Previous Medical Records

- Previous medical records from outside doctor's office

Procedure Note

- *Template generated procedure note*

Progress Note

- All dictated SOAP notes from the past
- *Template generated Progress notes*

PS Health History Form

Quick note

- *Template generated quick notes*

Radiology

- X-rays
- Ultra Sonography reports
- MRI
- CT scans
- DEXA bone density scans
- PET scan
- Other radiology reports

Radiology Intervention

- Radiology used during procedure

Resistance Assay

- HIV Drug Resistance Assay

Secure Message

Sensitive Note

- All self-pay visits/progress notes
- Any requests for restrictions from patients
- Notes that are not to be disclosed

Spirometry

- In-house spirometry

Transfer of Care Back

- Transfer of care back to CFHC, Inc.

Transfer of Care Out

- Transfer of care to an outside provider

Trauma

- Trauma

Triage note

- *Template generated triage notes*

Utilization Review**ADMINISTRATIVE DOCUMENTS****ADAP Approval Letter**

- ADAP 3014, Form 3056
- ADAP application and forms

Adult Health History

- Copies of adult health history

Affordable Care Act**Bankruptcy**

- Bankruptcy requests

Consent to Treat

- Copies of consent to treat forms

Dental Payment Worksheet

- Dental payment plan worksheet

Five Wishes**ID / Drivers License**

- Copy of drivers license or other legal ID

Insurance Cards

- Copy of insurance cards

Legal Guardianship / Power of Attorney**Living Will****Migrant Farmworkers Patient Registration****Name Change**

- Legal name change documentation

Notice of Privacy Practice

- HIPPA forms

NSF Documentation

Other

Patient Correspondence

- Warning Letters
- Dismissal Letters

Patient Information Forms

- Patient information forms completed by the patient via the patient portal

Patient Representative Release *this folder is located under Chart and Admin where should it be?*

Payment Plan

- Medical payment plan worksheet

Prior Approval

- Prior approval documentation

Proof of Income Pay Stubs

- Income and homeless shelter paperwork

Request to Change Carolina Access Provider

Request to Change Providers

- Change provider form

Ryan White Cap Letter

Social Security Card

Social Security Income Statements

Transfer of Care Outside CFHC

- When patient is transferring care to a facility outside of CFHC