Epic Care Everywhere - Request Outside Records

Audience:	This job aid is intended for Staff requesting outside Patient Medical Records through Epic Care Everywhere.
Purpose:	Provides instruction for requesting outside Patient Medical Records through Epic Care Everywhere

What is Care Everywhere?

Care Everywhere is used within the Epic Hyperspace patient record, to exchange electronic health records with outside organizations. It provides access, at the point of care, to a patient's medical records from other organizations. This gives clinicians access to information that may be critical for patient treatment, but which otherwise might not have been seen.

Not all users will have access to Care Everywhere. Per corporate decision, Physicians and Midlevels will only view records, not request records. ADT/Cadence will request records. Physicians, Residents, Physicians Assistants, Nurse Practitioners, Scribes, and Medical Students will review records and request updates. Nurses, Unit Clerks and MAs will request records and review Records. If you are in one of these roles and determine that you do not have the appropriate Care Everywhere functions, call the Help Desk.

Request for Information

Before clinicians can view a patient's record from an outside organization, you must query for and request that record from the organization using the Request Outside Records activity. From this activity, you can also collect authorization to request the patient's outside record when authorization is required.

The end user assigned to perform the Care Everywhere Request for Outside Records should ask the patient if they have been treated at another hospital in the past year. If they have been treated at another hospital, they should get the name of the hospital.

1. Open the patients chart and an active encounter..

2. Access the Request Outside Records activity by clicking 'More Activities > Request Outside Records'.

3. The More Activities menu appears in different locations, depending on the user. For example, registration will find the Outside Reports button on the Department Appointment Report (DAR).
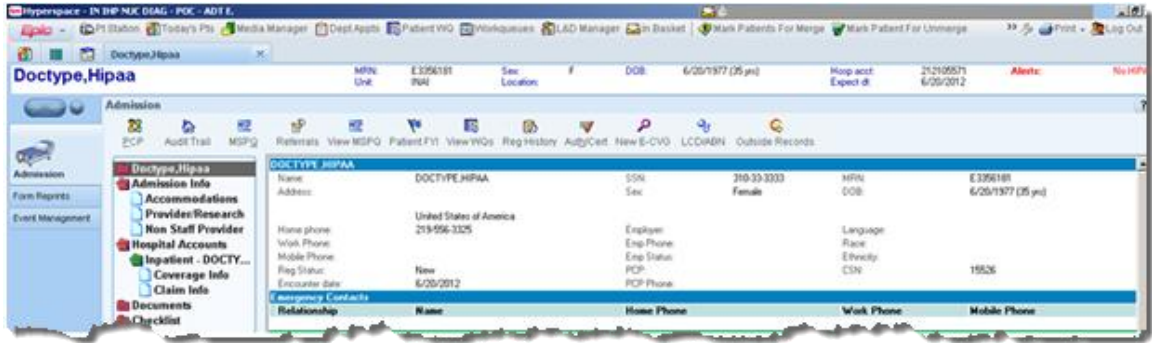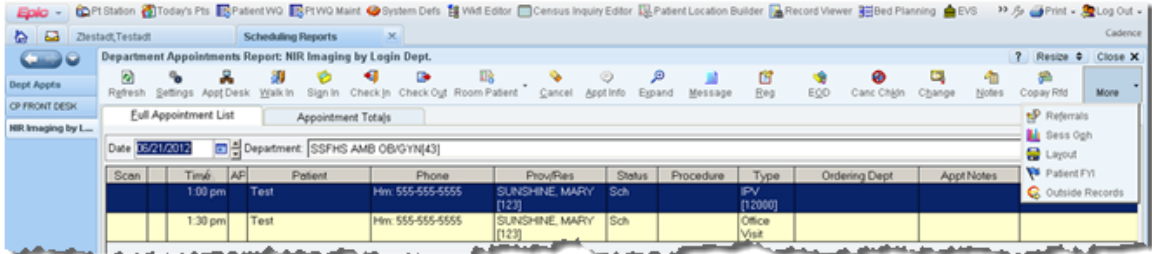
4. Select or enter the name of the health care organization you need to obtain records from in the Organization field.

5. Enter the Organization name and click the Query button.
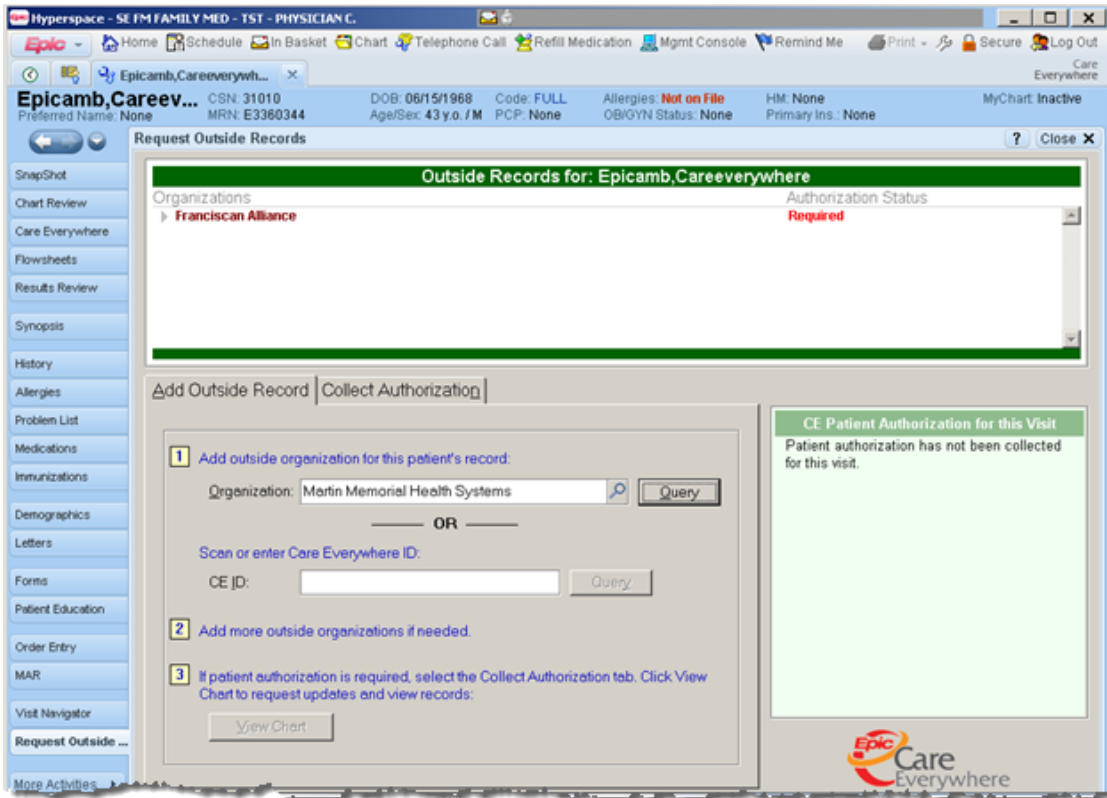
6. The Query Details window will open.

7. In the Reason field, enter the reason that you are querying for the patient's record. In the Further explanation field, enter additional information about why you performed the query. If it is not already entered for you, enter the provider's name in the Encounter provider field. Verify that the information is accurate. In the Password field, enter your password. Click Accept.

8. When the system displays the matching record, verify that the information matches the demographics on file at your organization. Highlighted text indicates that the information does not match and should be verified with the patient. To accept the match, click Yes.

Collect the Patient's Authorization

1. If authorization is not needed, click Request & Close to request the patient's information.

2. If the system displays an incorrect match or can't find a match, contact the outside organization to get the patient's Care Everywhere ID and perform a new query.

3. Select the Collect Authorization tab when authorization is required to request a patient's outside record. Click Print Form and give the form to the patient to complete and sign.

> (i) After the patient signs the form, scan the form into the patient's chart and use the following document types:
>
> HIPAA Release of Information Ambulatory (Amb)
>
> HIPAA Release of Information Acute (ROI) (Inpatient)
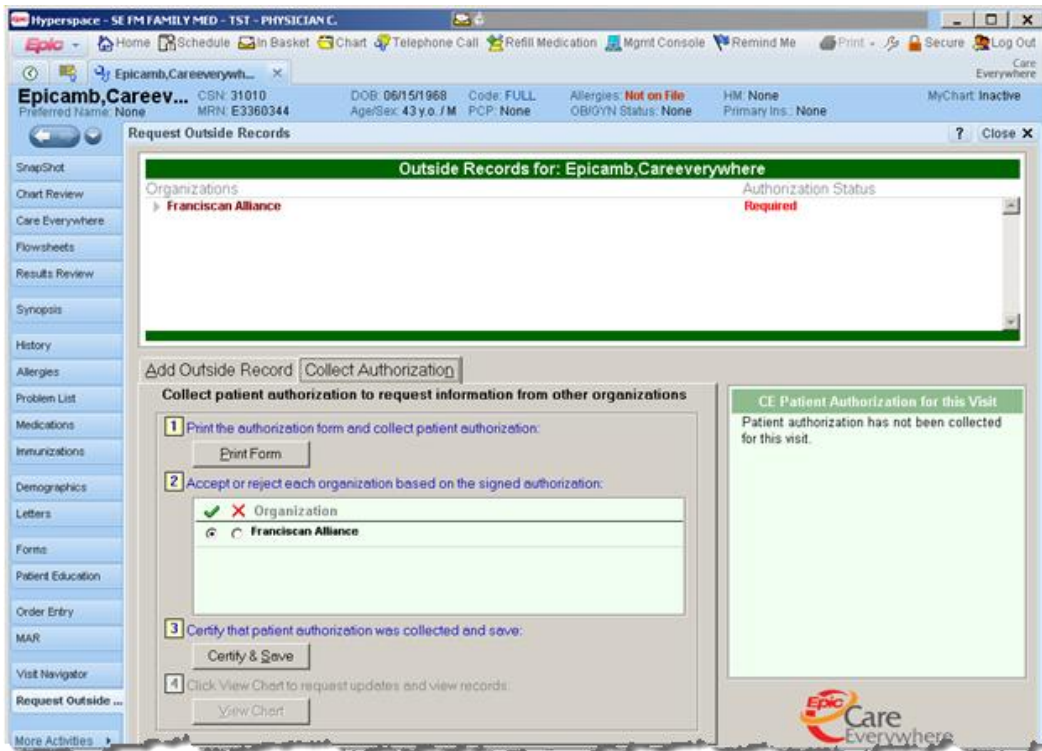
4. In the Organizations section of the activity, select the green check mark option for any organizations from which the patient has chosen to release their information. Select the red X option for any organization from which the patient has chosen not to release their information.

5. After you've verified that the organization names listed in the activity match the ones that the patient has indicated on the form and that the form is signed, click Certify & Save.

6. You will receive the Certify window. To complete the certification process, enter your password and click Accept.
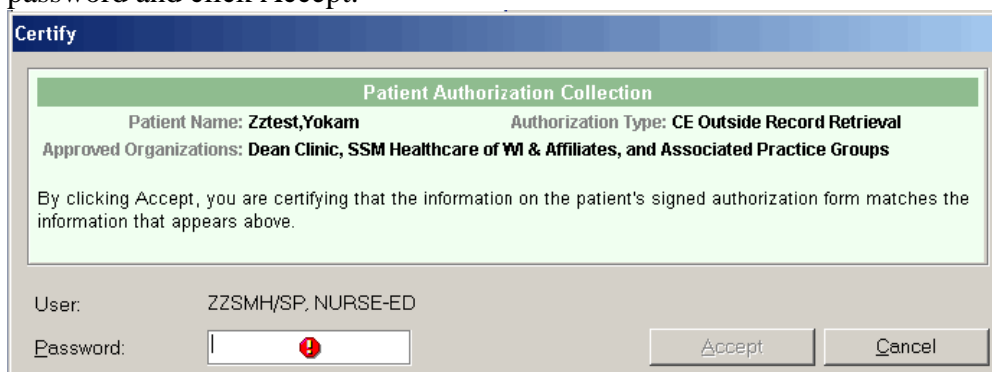
7. Click Request & Close to request the patient's information and close the activity.

If you query an outside organization and are unable to locate a patient's record, you can call the organization to find out if the patient has electronic records. The organizations phone number will display on the screen.

Provide patient identifying information to the organization you are trying to obtain electronic records.

The organization from which records are trying to be obtained will auto generate a Care Everywhere ID if the patient does not already have one.

Request the Outside records using the Care Everywhere ID.