

Epic Scanning and Indexing Frequently Asked Questions

Q: Will CROWN Scan still be used as our document management system to scan documents into the electronic medical record with Epic?

A. No, we will retire CROWN Scan and starting January 31st, 2020, Hyland OnBase will be our new document management system with Epic.

Q. Why did we choose to move to Hyland OnBase for scanning and indexing?

A. The three institutions of EpicTogether (Columbia, Weill Cornell Medicine, and NewYork-Presbyterian Hospital) conducted an extensive search for a document management system. Hyland OnBase was selected and integrates with more than 30 Epic modules, including Epic Canto™/Haiku™ to provide mobile access to a more accurate and comprehensive patient record.

Q. Will I have to have a separate login and password to access Hyland OnBase?

A. No, Hyland OnBase can be accessed directly through Epic via single sign on, so no need for a separate log in or password.

Q. Will the scanning and indexing workflow be different once we move to Epic?

A. Yes and no, certain items will still be scanned and indexed at the practices (e.g., insurance cards and other point of care documents). The biggest change will be for most other documents. Practice staff will still be responsible for scanning paper documents, while a third-party vendor will complete the indexing portion (filing the electronic documents to the right patient charts and into the right sections of the chart). This will free up staff to do more patient-centered functions within Epic. A guide is being prepared to better explain what gets scanned at the practices versus what should be sent to the indexing vendor and will be available prior to go-live.

Q. How will I get the documentation to the vendor to be centralized indexed?

A. Staff will have the following 3 options:

- Scanning into a batch directly to OnBase
- Emailing documents to the indexing vendor

- Faxing documents to the indexing vendor

Q. How will the indexing vendor know where to file the documents into Epic/Hyland OnBase?

A. ColumbiaDoctors HIM has collaborated with the indexing vendor to create a crosswalk, which maps our previous CROWN documents types to the new document types established with Epic and Hyland OnBase.

Q. How many document types are in Epic/Hyland OnBase?

A. When CROWN was implemented each Department and Division were able to choose their own document types, which resulted in a total of over 3,300 document types. With Epic and Hyland OnBase, this number was reduced to approximately 300 documents among the 3 institutions.

Q. How much does centralized indexing cost?

A. Centralized indexing will be at no cost to the Departments for the first year of the Epic go-live. After the first year if the Department would like to remain using the centralized indexing vendor, there will be a charge based on their volume of documentation.

Q. Will everyone be trained to scan within Epic/OnBase?

A. While there is no specific class for scanning with Epic/OnBase, users will receive supplemental training materials, such as tipsheets and videos for reference. Remember, the majority of the work will be done by our indexing vendor.

Q. Do I need a new scanner for Epic/Hyland OnBase?

A. Scanners currently used for CROWN Scan are compatible with Epic. They will need a new scan driver that the IT Groups will install before go-live.

Q. What is needed from my Practice for centralized indexing?

A. Each practice location will need to identify a Scan Super User. The role of the Scan Super User will be to answer any questions about document types and placement in the chart that the centralized indexing resource might have.

Q. What is the turnaround time for the centralized indexing vendor to file the documents within Epic?

A. The turnaround time for documents to get indexed is between 24 to 48 hours, and they do so with a 99.98% accuracy.

Q. What if documents need to be filed into the chart right away?

A. While staff will have the capability of point of care scanning, we ask that they limit this functionality to specific documents, such as insurance cards. Most documents do not require immediate scanning, providers can simply be given paper documents to review, however if needed and where appropriate, we can work with the Practice to identify an urgent indexing workflow.

Q. What if I have additional questions about scanning and indexing?

A. Please contact us at ColumbiaDoctors-HIM@cumc.columbia.edu

