

Health Information Management (HIM) Labeling/Scanning Guidance Sheet

Once a parent or patient has signed one of the forms noted below, it must be forwarded along to HIM to be scanned into the medical record.

- Consent Form (with or without HIPAA Authorization)
- Assent Form
- Permission to Participate (with or without HIPAA Authorization)
- HIPAA Authorization

The steps to complete this process are described in detail below.

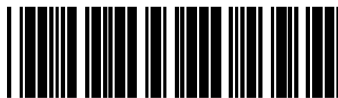
1. Separate each document.
 - Do not compile multiple documents into one
 - Though tough on the hands and fingers of HIM staff, stapling each document individually is best practice to ensure that each document is scanned to the appropriate document type within the Media tab in Epic.
 - Paper clips also work; however, when multiple documents are sent with paper clips, there is always the risk that pages may be separated and be scanned with the wrong document.
2. Determine which category the document falls into in order to identify which HIM label should be used:
 - a) Consent Documents
 - i. Consent Form (with or without HIPAA Authorization)
 - ii. Assent Form
 - iii. Permission to Participate (with or without HIPAA Authorization)
 - b) HIPAA Document
 - i. HIPAA Authorization
3. One HIM label should be placed on the first page of each document
 - Documents that are deemed “Consent Documents” should use the following label:
 - DT382_Consent for Research Study

CONSENT FOR RESEARCH/STUDY - DT382



- Documents that are deemed “HIPAA Documents” should use the following label:
 - DT138_Permission Use Health Info Research Purp

PERMISSION USE HEALTH
INFO RESEARCH PURP - DT138

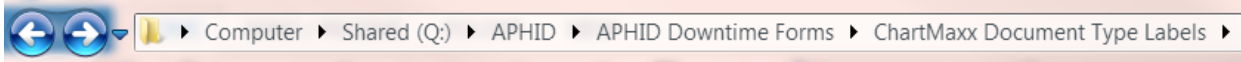


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Note: HIM has asked that we no longer utilize the “DT134_Stmnt of Volunteer Consent Research Stud” label. If this label has been utilized by your division in the past, please transition to the “DT382_Consent for Research Study” label in the future.

Where can the HIM labels be found?

The HIM labels can be found on the CHW Shared (Q) drive (see breadcrumb below)



Note: If you do not have access to the CHW Shared (Q) drive, please contact Diane Bauer.

Research Compliance Manager

E-mail: dbauer@chw.org

Phone: (414) 266-6237

A document to capture the Consent Discussion is often sent to medical records as well. In order to have this document scanned in to the Media tab of the EMR, it can be treated as a consent form.

IMPORTANT:

- HIM label should be placed in the bottom right-hand corner
- Please do not cover pagination or IRB information within the footer when placing the HIM label
- If an “IRB Barcode” remains on your consent form from a previous template, please place the appropriate HIM label over it. Multiple barcodes can impede the scanning process
- In addition to placing the HIM sticker on the first page of the document, please ensure that a patient label containing both the MRN and CSN is placed on the upper right-hand corner of the 1st page of the document. If you don't have a patient label this information can be hand-written on the document. This will ensure that the document being scanned is linked to the associated encounter within Epic.
 - If a label containing the CSN is not applied to the document, HIM will index the document with the most recent encounter which may not be the correct encounter
- If research teams adhere to this process, they can anticipate documents to be scanned and available via the media tab in Epic within 48 hours.

The most common reason for a delay in the scanning of documents or for documents to be sent back to you is absence of an HIM label. Historically, HIM may have scanned a document without a label in order to not delay the process; however, in the future if a document doesn't have a label it will be send back to you.

Send the Documents in an Interoffice Mail Envelope to:

HIM; SUMMIT Building; Suite 4250

Be certain to include “Sent By” information in the event that the documents need to be returned. HIM has asked documents be sent via interoffice mail instead of e-mail.