Indexing Faxes and Saving into Epic

VYNE/Trace is a third-party application utilized to manage faxes and electronically index the faxes into Epic at the patient level. This tip sheet will review the basic workflow for indexing faxes into Epic. The export time is around 2 minutes from VYNE/Trace to OnBase to then be seen in Epic.

Tip: It is recommended to have Epic up on one screen, VYNE/Trace open on a separate screen and the Tufts Medicine Doc Type Excel Spreadsheet* open.

The Epic CSN is a number to identify a specific encounter and can be located in Chart Review. VYNE/Trace's Account number field is where you will enter the CSN when required. Please watch the video on this topic which has this information in detail with screenshots and covers the Epic side as well.

Logging into VYNE

1. Access the Tracker interface at https://vynetrace.well-net.org/trackerdotnet/default.html#!/login/trace

2. Log in with your network credentials.

Indexing the faxes from the VYNE/Trace-Tracker worklist

3. Select the **New Inbound Items** worklist from the Worklists dropdown at top left.

4. Click a row in the worklist grid to view a document and its indexing options.

5. In the Indexing section below the worklist grid and to left of the document display, enter any combination of patient data you've been provided (e.g., last name, first name with DOB and/or MRN) and click the **Search** link.
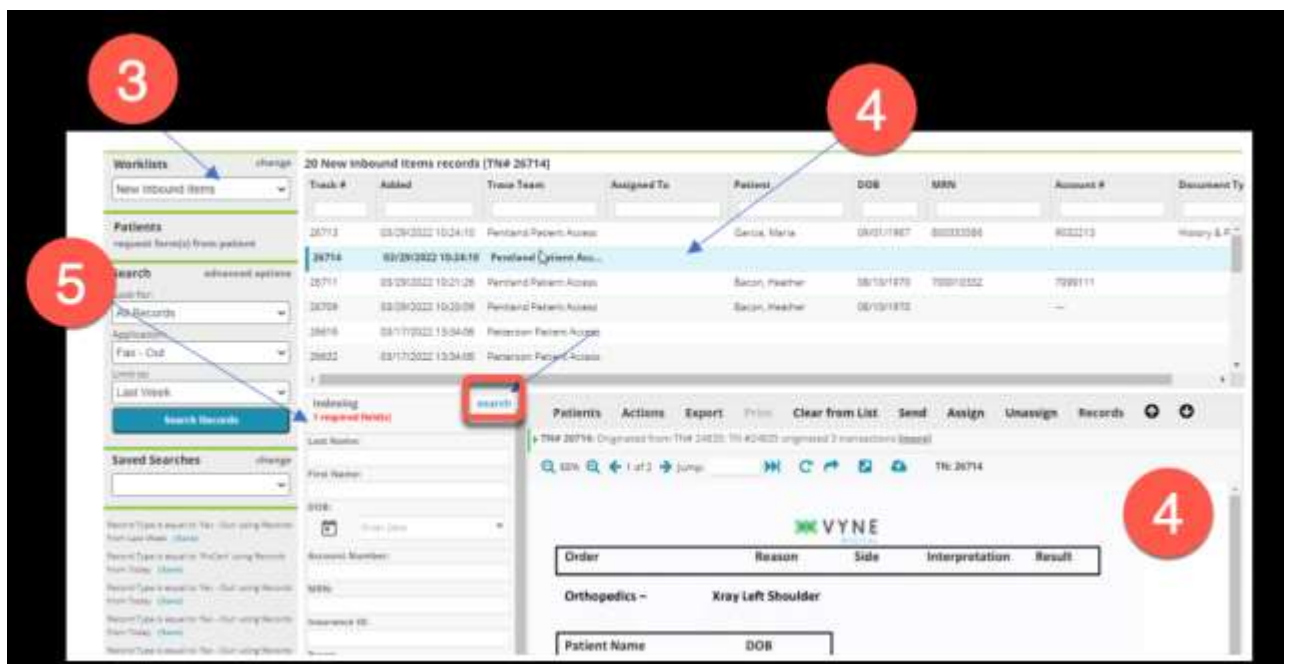
6. Review the results to locate a matching patient data entry with a CSN that includes a green check mark and click the **Select** button. UNASSIGNED patients will appear first, followed by those with CSNs, in descending order of Admitted date (Known as Encounter date in Epic).
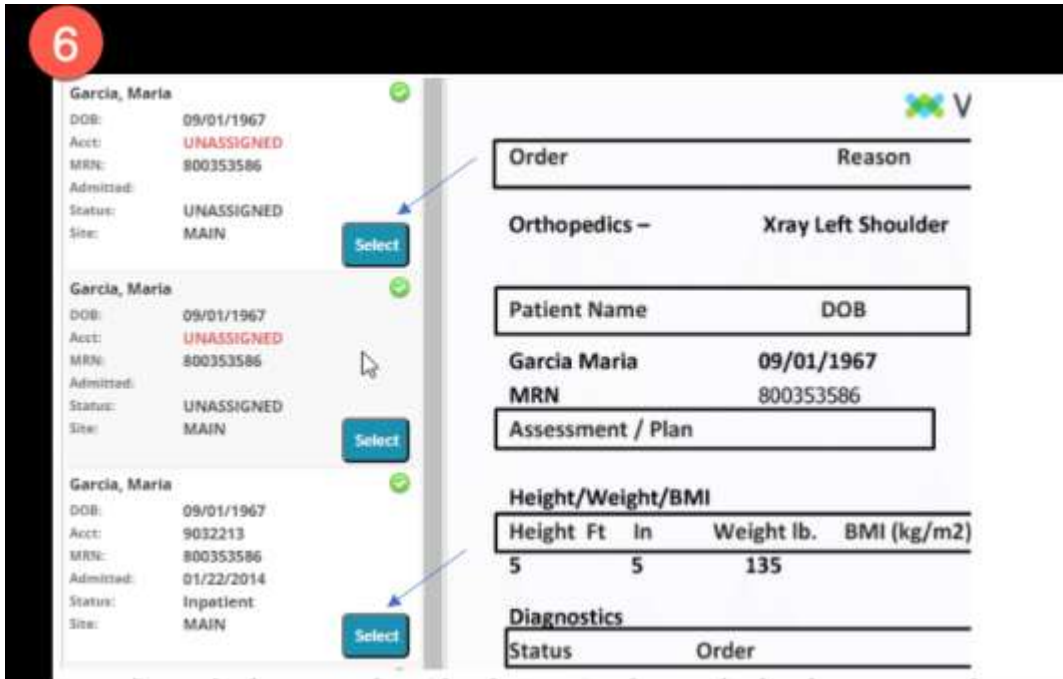

7. Once the patient is selected, fill in the required field values:
   a. Name
   b. DOB
   c. MRN
   d. Document Type
   e. Account number – (a.k.a CSN) when linking to a specific encounter in Epic

Note: You can locate the CSN in chart review of the patient medical record.

   i. If you are indexing just one patient, click **Save Patient**. To remove the item from the New Inbound Items worklist, select **Save, Clear from List**.

   ii. If you are indexing multiple document types for a single patient, click **Save, Reuse Patient**, making sure to designate a page range for each document type

   iii. If you do not want a specific page of the document to export (e.g., a coversheet or blank divider page), you can simply exclude its page number in the page range(s) you select
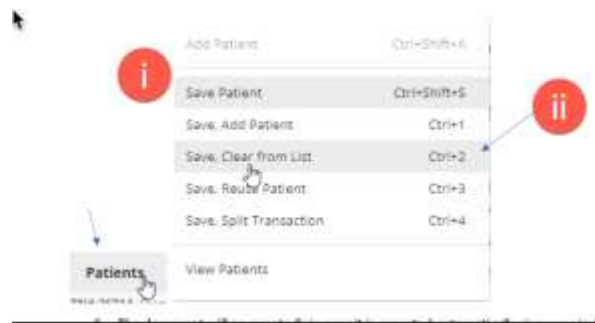
8. The document will go over to Epic once it is exported automatically since you indexed the patient's name, account number, document type. If the visit is not yet scheduled, you should schedule/register the patient, and then use the encounter that's created to index the document.

9. Repeat the appropriate steps above for each patient and/or document type being added until you reach the last one, when you will select Save Patient or Save, Clear from List.

Details: Indexing to the Document Type Levels in Trace

I. Patient-Level Documents (ID Cards, Insurance Information etc. No CSN Needed)

1. Select the transaction that you want that needs to be indexed as a patient level document type

2. In the indexing area of Tracker, type in the patients last name, first name and select "Search"

3. Select the patient that has "Unassigned" in the "Account Number" field

4. Select the "Document Type" from the dropdown list for the document (Refer to the Tufts Medicine Doc Type Spreadsheet* "highlighted in the Purple color"

5. Select "Patients" and then "Save, Clear from List"

6. The Document will flow over to Epic via OnBase from Trace

II. Encounter Level Document (H&P etc. Needs a CSN and Document type)

1. Select the transaction that you want that needs to be indexed as an encounter level document type

2. In the indexing area of Tracker, type in the patients last name, first name and select "Search"

3. Select the patient that has "a CSN" number in the "Account Number" field
   a. If there's not a visit for the patient and they need to be scheduled for a visit, schedule/register the patient in Epic and return to Trace to index once finished.

4. Select the "Document Type" from the dropdown list for the document (Refer to the Tufts Medicine Doc Type Excel Spreadsheet* "highlighted in the Blue color"

5. Select "Patients" and then "Save, Clear from List"

6. The Document will flow over to Epic via OnBase from Trace

III. Order Level Documents (Orders etc. Needs CSN, Document Type and Epic Order ID)

1. Select the transaction that you want that needs to be indexed as an order level document type

2. Schedule the patient in Epic per the order that is in Trace. Note: Transaction is not indexed to patient until patient is scheduled in Epic.

3. In the indexing area of Tracker, type in the patients last name, first name and select "Search"

4. Select the patient that has "a CSN" number in the "Account Number" field that you created

5. Select the "Document Type" from the dropdown list for the document (Refer to the Tufts Medicine Doc Type Excel Spreadsheet* "highlighted in the Yellow color"

6. Enter the "Epic Order ID" from Epic

7. Select "Patients" and then "Save, Clear from List"
8. The Document will flow over to Epic via OnBase from Trace

## Printing faxes from the VYNE/Trace-Tracker worklist

1. Choose the transaction you want to print and select the pop out arrow icon.

2. It will pop out to a PDF and then you can select your local printer and print the document out

Faxing from the VYNE/Trace-Tracker worklist

1. You can use Epic if the document is already in Epic. If it is on your desktop or on a shared drive you can use Pixcert to browse to or capture or print from Pixcert and then choose the fax tab once the document shows in PixCert.

2. Fill out the To and From
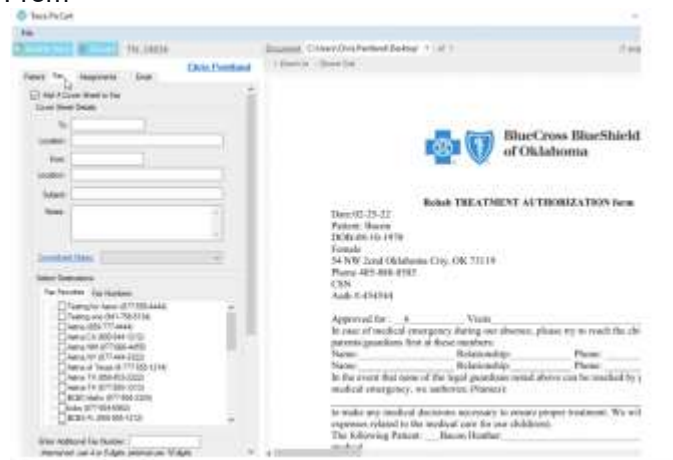
3. Choose the fax number or if not in your favorites, Enter the number in the Enter Additional Fax Number slot. We only need the area code and number. (We do not need an 8 or 9 or 1 for long distance)
4. Select "Send to Trace" when you are ready to fax it out.