

POLICY TITLE: Copy and Paste Notes in the Electronic Medical Record	ADMINISTRATIVE POLICY AND PROCEDURE MANUAL
POLICY #: 800.63	CATEGORY: Corporate Compliance
System Approval Date: 3/16/17	Effective Date: NEW
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Prepared by: Office Of Corporate Compliance, Emendation of a Medical Record Committee	Superseded Policy(s)/#/Notations: N/A

GENERAL STATEMENT of PURPOSE

Electronic Medical Record (EMR) copy and paste functions shall be used by clinicians appropriately to enhance patient safety, minimize non-compliance and ensure the data is accurate and current at the time the information is recorded.

According to the Centers for Medicare and Medicaid Services (CMS), whether documentation is a result of an EMR, pre-printed templates, or handwritten documentation, inappropriately cloned documentation will be considered a misrepresentation of the medical necessity requirements for coverage of services, due to lack of specific individual information for each unique patient. Clinicians must recognize that every patient is unique and must be sure that the services provided are documented distinctly from all other visits or patients.

Utilizing defaulted documentation also may cause a provider to overlook significant new findings that may result in safety/quality of care issues, as well as denial of services for lack of medical necessity.

POLICY

It is the policy of Northwell Health that all copied and pasted information within the electronic medical record must be verified prior to final submission.

SCOPE

This policy applies to all Northwell Health employees, as well as medical staff, volunteers, students, trainees, physician office staff, contractors, trustees and other persons performing work for or at Northwell Health; faculty and students of the Hofstra Northwell School of Medicine conducting research on behalf of the School of Medicine on or at any Northwell Health facility;

and the faculty and students of the Hofstra Northwell School of Graduate Nursing and Physician Assistant Studies.

DEFINITIONS

Addendum: An entry to a medical record to provide additional information. The entry should be documented as an “Addendum,” and include the current date, time, and be signed by the clinician.

Copy and Paste: While documentation may exist where it is worded exactly like previous entries, “Copy and Paste” typically refers to medical record documentation that has been copied and pasted, copied forward or cloned from another source location. Consequently, copied and pasted documentation may not accurately reflect current information which is specific to the patient encounter being documented. One or more of the following functions may be used within an EMR to clone:

1. Copy and paste;
2. Copy forward;
3. Save note as a default template;
4. Any other function that allows an individual to copy information from one patient visit note to the current visit for either the same or a different patient.

PROCEDURE/GUIDELINES

In order to protect and enhance patient safety, clinical documentation, regardless of how it is created, should be accurate, reliable, and timely. The time-saving efficiencies of reusing information in the electronic environment through copy and paste to document complex medical conditions can ensure completeness of encounter documentation and generally produces fewer transcription errors.

Acceptable Practices

While there can be value to the selective and careful copying of information with a patient’s medical record, copying and pasting should be done selectively and thoughtfully and with the goal of producing a clear, useful and accurate patient note. When used appropriately, it reduces errors of omission in transcription and minimizes inclusion of incorrect information. Northwell Health standards for electronic documentation include:

1. Entries should be accurate, relevant, timely and complete.
2. Clinician entries should accurately reflect the clinical work performed on each separate date of service. The clinician signing the note acknowledges his/her responsibility for the accuracy of the content of that note including any copied and pasted information. Notes will

be reviewed and signed according to Northwell Health policy #800.20 - *Physician Signature Requirements*.

3. Applicable lab, pathology and radiology results should be summarized in clinician documentation, or have interpretation if portions copied.

Unacceptable Practices

Although clinicians may utilize “Copy and Paste” as clinically appropriate, the following are prohibited practices:

1. Copying and Pasting documentation without verifying, editing and/or updating as appropriate.

Non-Compliance and Auditing

Any misuse of Copy and Paste or Copy Forward shall be reported to the Office of Corporate Compliance.

The Office of Corporate Compliance will periodically monitor, measure and assess EMR claims to detect inappropriate Copy and Paste.

REFERENCES to REGULATIONS and/or OTHER RELATED POLICIES

- Northwell Health Policy #800.20 Physician Signature Requirements
- Northwell Health Policy #200.13 Patient Request for Medical Record Amendment
- Northwell Health Policy #200.14 Modifications in the Medical Record
- Joint Commission Standard RC.01.02.01
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CLINICAL REFERENCES/PROFESSIONAL SOCIETY GUIDELINES

ECRI: Safe Practice Recommendations for Copy and Paste

ATTACHMENTS

N/A

FORMS

N/A

<u>APPROVAL:</u>	
System Administrative P&P Committee	2/22/17
System PICG/Clinical Operations Committee	3/16/17

Standardized Versioning History:

*=Policy Committee Approval; ** =PICG/Clinical Operations Committee Approval