

Target Audience: EpicCare Office OR Schedulers

Uploading Patient Photo ID and Insurance Card Information in EpicCare Link

The EpicCare Link Office OR Scheduler are able to upload the patient **Photo ID** and **Insurance Card Information** in EpicCare Link.

PHOTO ID AND INSURANCE CARD INFORMATION ARE THE ONLY TWO DOCUMENTS TO BE UPLOADED

You no longer will go through Citrix to access EpicCare Link. Use epiccarelink.inova.org for access to EpicCare Link.

A **Two Factor Authentication** will be needed to log into EpicCare Link, please see the associated tip sheet, **Log In To EpicCare Link With Two Factor Authentication (2FA)**.

Just the Facts:

Uploading Patient Photo ID and Insurance Card

1. **Open the patient record** in EpicCare Link.
2. In the **Storyboard** space, click **Upload document**.
3. In the **Upload Document** window:
 - **Message for reviewer:** Describe the document and any notes for the reviewer.
 - **Add files:** Click to upload the saved document.
 - **Type:** Choose either Photo ID or Insurance Card.
 - **Description:** Optional free-text field.
4. Click **Submit for review**.
5. A confirmation message will show: **"1 file submitted for review."**
6. Click **OK**.

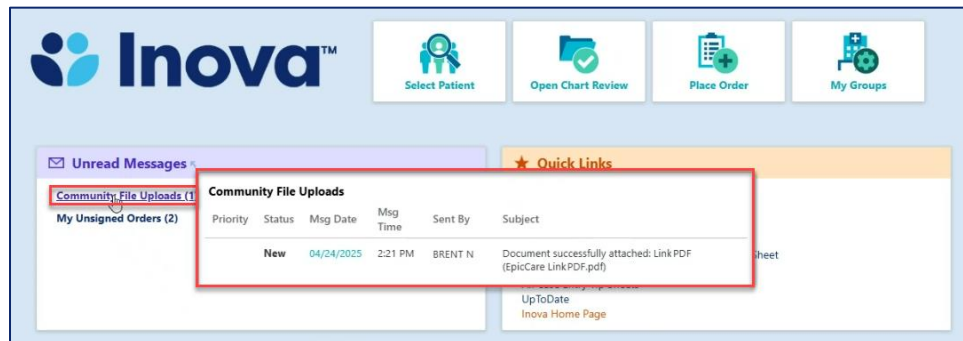
After Upload

- Documents are sent to the **Inova HIM department** for approval.
- Once approved, they appear in the **patient's chart** under:
 - **Chart Review > Media tab**
 - Click the **Date/Time hyperlink** to view.
 - Use the **Media Information** section link to open the document.
- If the document is denied, you will receive an InBasket message.

Details:

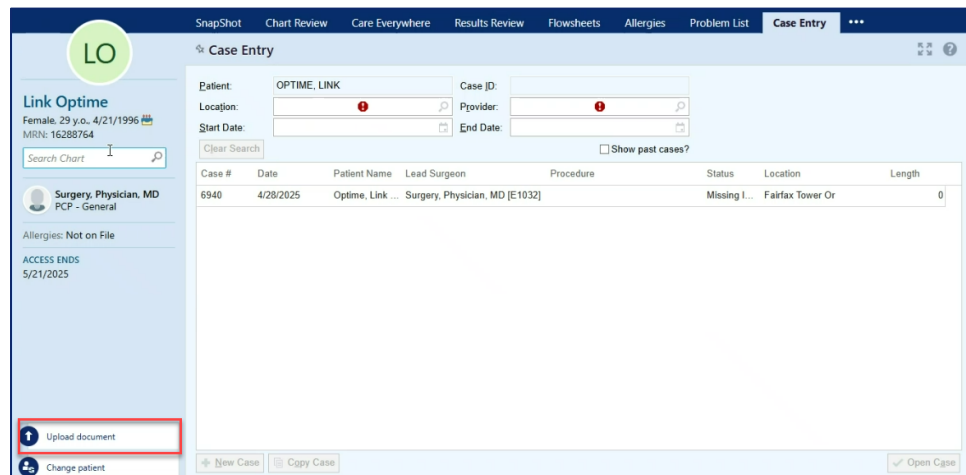
Community File Uploads

Within 24 hours of uploading any documents, they will be available to view in the **Community File Uploads** link.

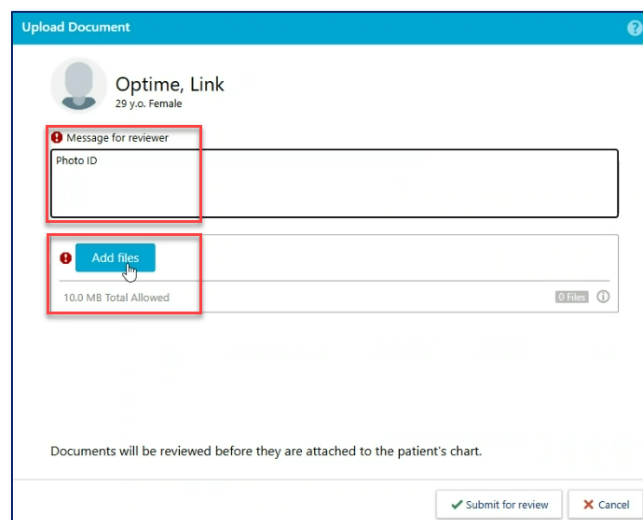


Upload Patient Photo ID and Insurance Card Information

- With the patient record open, in the Storyboard space, click **Upload document**.



- The Upload Document window will open:
 - Enter a **Message for reviewer**: enter what the document is regarding and any other message needed for the reviewer.



- Add files: Click **Add files** to add the saved document.
- Type: click the drop down arrow to select **Photo ID** or **Insurance Card** depending on the document.
- Description: Free text field for document description.
- Click **Submit for review**.

Upload Document

Optime, Link
29 y.o. Female

Message for reviewer
Photo ID

Add files

Epic Uploads.docx

Type
Photo ID

Description
Photo ID

20 KB (10.0 MB Allowed)

Documents will be reviewed before they are attached to the patient's chart.

Submit for review Cancel

Upload Document

Optime, Link
29 y.o. Female

Message for reviewer
Insurance Card

Add files

Epic Uploads.docx

Type
Insurance Card

Description
Insurance Card

20 KB (10.0 MB Allowed)

Documents will be reviewed before they are attached to the patient's chart.

Submit for review Cancel

- Once the file has been successfully uploaded, **1 file submitted for review** will appear in the Upload document window.
- Click **OK**.

Upload Document

✓ 1 file submitted for review

OK

- Follow the steps above to submit the Insurance Card Information.

These documents will go to the Inova HIM department for approval.

- Once approved, the documents will be available in the patient's chart, in Chart Review under the Media tab.
 - If the document is denied, you will receive an InBasket message.
- Click the Date/Time hyperlink to view the uploaded documents.

The screenshot shows the Epic Chart Review interface. The top navigation bar includes Home, In Basket, Patient List, Referral Search, Schedules, Catalog, Optime, Link, and Admin. The left sidebar displays the patient's name 'Link Optime', gender 'Female', age '29 y.o.', date of birth '4/21/1996', and MRN '16288764'. The main content area is titled 'Chart Review - Loaded: 2' and features a tabbed interface with 'Media' selected. Below the tabs is a table with columns: Encounters, Notes, Labs, Micro, Imaging, Procedures, Card Proc, ECG, Meds, Other Orders, Media, Consents, and Letters. The table lists two documents: 'Insurance Card' and 'Photo ID', both uploaded on 04/28/2025 at 12:55. The 'Date/Time Scanned' column is highlighted with a red box.

Encounters	Notes	Labs	Micro	Imaging	Procedures	Card Proc	ECG	Meds	Other Orders	Media	Consents	Letters

- Click the link in the Media Information section to view the document if needed.

The screenshot shows the Epic Chart Review interface, specifically the 'Media Information' section. The top navigation bar and left sidebar are the same as in the previous screenshot. The main content area is titled 'Chart Review - Media > Report Viewer'. The 'Media Information' section displays a document entry: 'Document on 4/28/2025 12:55 PM by Test, Link Surg Or Scheduler W-Admin: Test Insurance Card for EpicCare Link (Epic Uploads.docx)'. The document entry is highlighted with a red box.