Texas Tech University Health Sciences Center El Paso
Institutional Compliance Policy

<table>
<thead>
<tr>
<th>Policy: BCP EP 7.2 EHR Cloning (Copy and Paste) Functions</th>
<th>Effective Date: July 15, 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Last Revision Date: October 25, 2023</td>
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<tr>
<td>References: N/A</td>
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</tr>
</tbody>
</table>

**Policy Statement**

This policy sets forth standards for the appropriate use of the cloning/copy and paste/copy
forward functions within an Electronic Health Record (EHR) for documentation and billing
purposes.

**Scope**

This policy applies to:

- All EHR systems licensed by Texas Tech University Health Sciences Center El Paso
  (TTUHSC El Paso); and
- All TTUHSC El Paso faculty, residents, staff, and students who document health care
  items or services in an EHR system (i.e., affiliated hospital, V.A.) as part of providing
  services on behalf of TTUHSC El Paso.

**Policy**

Information within an EHR shall only be cloned in accordance with the procedures outlined
in this policy. Any cloned information in the EHR that does not comply with this policy
shall not be used by TTUHSC El Paso for billing purposes.

**DEFINITIONS**

For purposes of this policy, these terms have the following meaning:

1. Cloned documentation refers to medical record documentation that has been cut and
   pasted from another source location and, consequently, may or may not accurately
   reflect information specific to the individual patient encounter once it is completed in its
   cloned location. One or more of the following functions may be used within an EHR to
   clone: (a) copy & paste; (b) copy forward; (c) save note as template; (d) any other
   function that allows an individual to copy information from one patient visit note to the
   current visit date for either the same or different patient.

2. Provider includes Physician, Advance Practice Nurse, Certified Nurse Midwife,
   Physician’s Assistant, Psychologist, Audiologist, Licensed Clinical Social Worker, and
   any other health care professional licensed and credentialed by TTUHSC
   El Paso to provide and bill for health care items or services.

3. Resident includes any individual enrolled in an approved Graduate Medical Education
   Program at the TTUHSC El Paso Paul L. Foster School of Medicine (PLFSOM)
   Resident.
4. Student, including graduate students, includes any individual enrolled in an approved program of study at TTUHSC El Paso or other accredited health sciences school.

5. Demographic information includes patient name, patient medical record number, unique identifying number (i.e., social security number), provider name, patient address, and contact information.

PROCEDURE

1. Identification of Entries and Cloning
   a. All entries into the TTUHSC El Paso EHR record should identify the author of the entry by name and professional credentials.
   b. Cloned information should be identifiable within the TTUHSC El Paso EHR system or through an audit trail, including the identification of the author of the cloned information, the source of the cloned information and the date of the cloned information. It is the responsibility of the provider to update the cloned information to reflect the patient's status related to the current visit.

2. Cloning Prohibited between Different Patient Records

Medical record information shall not be cloned from one patient's medical record to another in any TTUHSC El Paso EHR system.

3. Psychotherapy Visits:
   a. Documentation of information in the EHR related to psychotherapy visits (excluding psychotherapy notes and patient demographic information) shall only be entered by the individual providing the service.
   b. Psychotherapy visit information (excluding demographic information) shall not be cloned from one visit to the next.

4. Evaluation and Management (E/M) Visits:
   a. The provider may clone relevant portions of the patient's previous visit note entered by the same provider or SOM resident in that provider's Department to the extent it represents the level of work performed by the provider during the current visit. It is revised to reflect any changes in the information. In such cases, the provider's signature shall serve as his/her attestation that the
Texas Tech University Health Sciences Center El Paso
Institutional Compliance Policy

information is accurate; and that any cloned information is current and represents
the provider's services for that date of service.

b. A student's or SOP resident's documentation of History of Present Illness (HPI),
Exam, or Plan/Assessment shall not be cloned by the provider or SOM resident
for purposes of documenting the document the visit.

c. Cloned information from the Review of Systems (ROS) must be verified and
confirmed as accurate by the billing provider and only be counted
for billing purposes to the extent the cloned ROS is medically necessary for that
visit. Any ROS element that conflicts with the HPI or Chief Complaint (CC)
portion of the visit note shall not be used or counted for billing purposes.

d. Information from other portions of the History (i.e., Medications List, Past
Medical, Family & Social History) must be reviewed by the billing provider and
shall only be counted for billing purposes to the extent it is medically necessary
for that visit. Any other History portion that conflicts with the HPI, CC, or other
portions of the medical record shall not be used or counted for billing purposes.

e. Providers and Residents shall receive a copy of this policy as part of EHR
training. The Billing Compliance Director (BCD) Unit Manager shall notify EHR
trainers of these requirements and provide them with information on where to
obtain a copy of this policy to distribute.

Administration and Interpretation, Revisions, or Termination

e. Questions regarding this policy may be addressed to the TTUHSC El Paso Institutional
Compliance Officer or the Billing Compliance Unit Manager.

Frequency of Review
Questions regarding this policy may be addressed to the respective TTUHSC El Paso PLF/ SOM
campus BCD or the Institutional Compliance Officer.

Failure or refusal to comply with this policy may be reported to the Department
Chair/Administrator, campus Billing Compliance Advisory Committee (BCAC), Institutional

Page 3 of 4
Policy: BCP EP 7.2
Texas Tech University Health Sciences Center El Paso
Institutional Compliance Policy

Compliance Committee for corrective action and/or disciplinary action and may result in non-billable claims.

This policy may be amended or terminated at any time to reflect changes in law, payment policies or TTUHSC El Paso practices. This Policy shall be reviewed no later than November each odd-numbered year.

Review Date: June 2018, March 2019, October 25, 2023
Revision Date: June 2018, March 2019, October 25, 2023