

Epic Security Template Inventory & Review Tracker

HIPAA | Minimum Necessary | Annual Re-Certification | TechFitFlow.com

Every active template must have a privacy officer sign-off and an annual re-certification date. Templates without a named owner or without a review date within the last 12 months are a HIPAA Security Rule finding waiting to happen.

Review Status: CURRENT (reviewed within 12 months) | DUE (review overdue) | IN REVIEW | PENDING SIGN-OFF

SECTION 1 - BASE TEMPLATE INVENTORY

Template Name	Role Category	Modules/Workflow	User Count	Privacy Officer Sign-off	Last Reviewed	Review Status	Next Review Due	Annual Re-cert Owner
RN Base Template	Nursing	ClinDOC, eMAR, Flowsheets, Critical Care	245	J.Smith - 04/26	04/2026	CURRENT	04/2027	Nursing Dir
ICU RN SubTemplate	Nursing - ICU	flowsheets, vasopressor doc, ED triage	48	J.Smith - 04/26	04/2026	CURRENT	04/2027	ICU Mgr
ED RN SubTemplate	Nursing - ED	board, triage, rapid assessment	62	J.Smith - 04/26	04/2026	CURRENT	04/2027	ED Mgr
MD/Provider Base	Physician	CP OE, Notes, Order sets, Inpatient list, present	312	M.Jones - 03/26	03/2026	CURRENT	03/2027	CMO Office
Hospitalist SubTemplate	Medicine	discharge planning, DRG	44	M.Jones - 03/26	03/2026	CURRENT	03/2027	Hosp Dir
ED Physician SubTemplate	ED Medicine	ED patient list, fast track, procedure notes	28	M.Jones - 03/26	03/2026	CURRENT	03/2027	ED Med Dir
Pharmacist Base	Pharmacy	BCMA admin, Profile	67	J.Smith - 04/26	04/2026	CURRENT	04/2027	Pharm Dir
Registration Base	Registration	registration, coverage,	88	A.Brown - 02/26	02/2026	CURRENT	02/2027	Reg Mgr
Billing Base	Revenue Cycle	Rescheduling review, claim BH flowsheets,	42	A.Brown - 02/26	02/2026	CURRENT	02/2027	Rev Cycle Dir
Behavioral Health RN	BH Nursing	psych notes, sensitive record	22	J.Smith - 04/26	04/2026	CURRENT	04/2027	BH Dir
Read-Only Audit	Auditing	access only - no order/document System coning,	8	J.Smith - 01/26	01/2026	CURRENT	01/2027	Privacy Officer
IT Security Admin	IT Admin	template Admin - NO patient access	5	Privacy Ofcr - 04/26	04/2026	CURRENT	04/2027	CISO
Agency/Temp Staff Base	Float/Agency	Limited assigned unit only, no Backer access	0	J.Smith - 03/26	03/2026	CURRENT	03/2027	Nursing Dir
Legacy Lab Analyst	Lab (old)	REPLACED by new Lab template	3	NOT REVIEWED	08/2024	DUE	OVERDUE	Unassigned

SECTION 2 - USER PROVISIONING LOG

User Name	Role / Title	Dept	Templates Assigned	Supervisor Approval	Provisioned Date	Last Role Change	Deprovisioned?
Smith, Jane	ICU RN	4-West ICU	RN Base + ICU SubTemplate	M.Williams - 04/26	04/14/2026	N/A	No - Active

Johnson, Bob	Hospitalist MD	Medicine	MD Base + Hospitalist Sub	Dr.Lee - 03/26	03/01/2026	N/A	No - Active
Davis, Karen	ED Pharmacist	ED Pharmacy	Pharmacist Base + ED Sub	R.Patel - 04/26	04/20/2026	N/A	No - Active
Chen, Li	Registrar	Admissions	Registration Base	S.Brown - 02/26	02/10/2026	N/A	No - Active YES -
Wilson, Tom	Former IT Analyst	IT (Termed)	IT Security Admin	N/A	01/15/2026	N/A	05/01/26 (8 hrs after last day)