

Beaumont

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Specimen Processing Laboratory Registration Non Face to Face

Document Type: Procedure

I. PURPOSE AND OBJECTIVE:

The purpose of this document is to provide the required information and guidance to be followed when registering patients in Epic Beaker that are not in the presence of the staff entering the information. This document and procedure below meet the Beaumont Registration requirements of three identifiers and identifies what qualifies as an acceptable identifier.

II. PROCEDURE:

A. Patient Look Up

1. The primary search technique will be:
 - a. Full last name, Full First name – Example: Test, Patient with date of birth.
 - b. If a matching patient was not found follow the below steps:
 - i. **The first three letters of the last name, the first three letters of the first name with date of birth. Example: Test, Pat (If patient name is Test, Patient, search: Tes, Pat)**

B. Patient Identification

1. Before selecting an existing medical record, the requisition/face sheet/ID must contain a matching:

a. **Name**

- i. Should NOT contain any punctuation (hyphens, apostrophes, etc.) – use a space in place of punctuation.
- ii. Middle name/initial must match **if present**.
- iii. It is acceptable if it's missing the middle name/initial but **can NOT be discrepant**

b. **Birth Date**

c. **Acceptable Third Identifiers**

- i. Address
- ii. Social Security Number (SSN) Last 4 digits are acceptable if that is all that is listed.
- iii. Phone number (Can be verified in EPIC Patient Station)
- iv. Medical Record Number (MRN)
- v. **NOTE:** The above third identifiers are the **ONLY** acceptable options: Sex is NOT a third identifier.

C. **Patient Identity Fields**

1. The following patient identity fields should **NEVER** be changed without **direct validation with the patient** which will not occur during Non Face to Face registration.

a. **Name**

b. **Date of Birth (DOB)**

c. **Sex**

d. **Social Security Number (SSN)**

- i. **Exception:** All zeros may be entered into the SSN field of existing records when it was previously blank (only if there are 3 other exact matching identifiers).

2. **Address**

- a. If Address Number is discrepant but Street, City, and Zip Code match the requisition, select the existing record and create a “follow up” task.
- b. If the address format is different on the requisition, select existing record.
 - i. Heights vs. Hts.
 - ii. Mount vs. Mt.
 - iii. Avenue vs Ave.
 - iv. Street vs. St
 - v. Drive vs Dr.
 - vi. **NOTE:** If the Street Address is correct but it is missing one of the above suffixes, the record can still be selected. Example: If 123 Beaker Street is listed as 123 Beaker you can select it.

- c. **Note: When in question, create a new MRN and create a “Follow up” task with customer service. It is easier and safer for a potential duplicate to be created and followed up on, than to add labs to the wrong patient record.**

3. Name

- a. **An existing MRN may be used if the name is in the following format and there is an EXACT matching MRN, EXACT matching DOB and EXACT matching SSN, EXACT matching Phone Number, or Address:**
 - i. The requisition has a nickname like Bob, and Epic has Robert.
 - ii. The names are reversed on the requisition, like Tracy Michelle instead of Michelle Tracy
 - iii. The name is hyphenated in Epic, but only one name is on the requisition (or visa versa).
 - iv. **NOTE:** A “Follow up” task must be added for Client Services
- b. **You MUST create a new MRN in the following scenarios, regardless of any other matching identifiers:**
 - i. Patient name is spelled differently.
 - ii. Requisition only lists name and date of birth with no other identifiers.
 - iii. The SSN on the requisition differs from Epic.
 - iv. **A “Follow up” task MUST be added for Client Services.**

D. Creating a New Medical Record Number:

- 1. In the patient lookup box enter the patient's name, SSN, sex, and DOB
 - a. Enter the patient’s name
 - i. Should NOT contain any punctuation (hyphens, apostrophes, etc.) – use a space in place of punctuation
 - ii. Middle name/initial must match if present
 - iii. It is acceptable if it’s missing the middle name/initial but can NOT be discrepant
 - b. Enter the SSN(Social Security Number) - A full Social Security Number listed on a requisition or attached face sheet can ONLY be documented when creating a new medical record.
 - i. If the SSN is not on the paperwork enter all Zeros
 - ii. If only partial SSN is listed enter all Zeros
 - c. Enter the patient’s Sex
 - i. If the Sex is unknown enter Unknown and add a “Follow Up” task.

- d. Enter the patient's Date of Birth
 - i. If the Date of Birth is not provided enter 01/01/1901 and add a "Follow Up" task.
2. Create a New Patient. By selecting "NEW and Reg"
3. Click Accept on next screen
4. Click on the blue Demographics icon
 - a. Enter the address, city, state, and zip code.
 - i. The address must use all Capital letters for street names: 1234 SMITH DR
 - b. Enter the patient's phone number
5. Click Finish in the bottom right of the screen
 - a. There may be a warning present due to the lack of face-to-face registration. If the system prompts you to review them, select Continue Anyway

E. Missing or Incomplete Guarantor Information for Minors

1. **When there is no responsible party/guarantor listed**
 - a. Select Other for the relationship
 - b. Enter the guarantor name of "(Patient's last name), Parent"
 - c. Pull patient's address only when using the "Pull Info" function.
2. **When a responsible party/guarantor name is listed, but the relationship is not indicated**
 - a. Select Other for the relationship
 - b. Enter the guarantor name from the requisition
 - c. Pull patient's address only when using the "Pull Info" function.
3. **For adult patients (18 years or older)**
 - a. Add the defaulted relationship or Self and all information will pull through
 - b. **NOTE: In order to list someone other than the patient as the guarantor (responsible party) the requisition must indicate that person is the legal guardian and paperwork documented.**

Approval Signatures

Step Description	Approver	Date
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CLIA Medical Directors	Muhammad Arshad: Chief, Pathology	8/24/2023
CLIA Medical Directors	John Pui: Chief, Pathology	8/21/2023
CLIA Medical Directors	Jeremy Powers: Chief, Pathology	8/18/2023
CLIA Medical Directors	Vaishali Pansare: Chief, Pathology	8/17/2023
CLIA Medical Directors	Ann Marie Blenc: System Med Dir, Hematopath	8/17/2023
CLIA Medical Directors	Ryan Johnson: OUWB Clinical Faculty	8/16/2023
Policy and Forms Steering Committee Approval (if needed)	Michelle Fischer: Mgr, Lab Support Svcs	8/15/2023
Lab Operations Directors	Joan Wehby: Dir, Lab Operations C	8/10/2023
Lab Operations Directors	Elzbieta Wysteppek: Dir, Lab Operations B	7/18/2023
Lab Operations Directors	Kimberly Geck: Dir, Lab Operations B	7/17/2023
Lab Operations Directors	Brittnie Berger: Dir, Lab Operations C	7/17/2023
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