

	Procedure for Performing an Amendment to a Signed-Out Case	Dept:	Pathology
		Effective Date:	2/18
		Revised Date:	New
		Contact:	Pathology Department Chair
Name & Title: Gregory Pomper, MD, Medical Director Clinical Laboratories			
Signature: Signature on file		Date:	2/16/18

1) General Policy Statement:

It is the policy of Wake Forest Baptist Medical Center (WFBMC) Pathology Department to define the steps for creating an amendment to a signed-out case.

- a) **Scope:** This policy applies to all any Pathology staff who have appropriate security within CoPath system to amend a Pathology report.
- b) **Responsible Department/Party/Parties:**
 - i. Procedure owner: Department of Pathology Medicine
 - ii. Procedure: Department of Pathology Medicine
 - iii. Supervision: Department of Pathology Chair and Department of Pathology Administrative Director.
 - iv. Implementation: Department of Pathology Chair and Department of Pathology Administrative Director

2) Definitions:

- a) **WFBMC:** Wake Forest Baptist Medical Center and all affiliated organizations including Wake Forest University Health Sciences (WFUHS), North Carolina Baptist Hospital (NCBH), all on-site subsidiaries as well as those off-site governed by WFBMC policies and procedures.
- b) **Policy:** As defined in the Policy on Creating and Amending Policy, a statement of principle that is developed for the purpose of guiding decisions and activities related to governance, administration, or management of care, treatment, services or other activities of WFBMC. A policy may help to ensure compliance with applicable laws and regulations, promote one or more of the missions of WFBMC, contain guidelines for governance, and set parameters within which faculty, staff, students, visitors and others are expected to operate.

3) Policy Guidelines:

There are 3 steps in creating an amendment to a signed-out case:

- Amendment Entry (unlocks the case previously locked at sign-out)

- NOTE: if any information entered in Amendment Entry needs to be updated once the original amendment is created, use Amendment Edit function to make changes.
 - Final Diagnosis Entry/Edit (modify/update text on case)
 - Sign-out the amended case
- A. Amendment Entry
1. Open Amendment Entry – enter specimen # to be amended and open case
 2. Amendment date automatically populates along with pathologist/resident/fellow associated with case)
 3. Amendment Reason – select an appropriate reason from the drop-down box
 4. Comment – enter a comment for why the amendment is occurring
 5. Save/Switch Activities to save and open case in Final Diagnosis Entry/Edit
 6. Note: Case status becomes “Amended” and displays the amendment date in specimen inquiry on the Events tab
- B. Final Diagnosis Entry/Edit
1. Open Final Diagnosis Entry/Edit – enter case # to be amended and open case
 2. On the TEXT tab, select Edit Text
 3. Word opens; click into the final diagnosis field and position cursor at the top left corner of that field
 4. Click on the “running man” and type amended and return to insert the amended report statement from the quick text dictionary
 - AMENDED REPORT
 - AMENDED
 5. Enter data and reason for amendment after “AMENDED” to appear similar to example below:

Should include changed "from" - "to"

6. **NOTE:** The pathologist is responsible for providing the "reason for amendment" for transcription to enter into the case. The reason should indicate what is being changed so it is readily apparent to the clinician.

C. Sign-out amended case

1. Once all changes are made, save the case and put it back on the pathologist's worklist for electronic sign-out.
2. The pathologist signs the case out
3. The case is interfaced to WakeOne and appears with a status of EDITED in the chart review labs tab; the text displays with the amended statement and overwrites the previous version in WakeOne. The previous version is retained in WakeOne and in CoPath.
4. **NOTE:** The original sign-out date is listed as "Sign-out date time", just above the amendment sign-out date appears as "Latest Sign-out date time" in specimen inquiry on the Events tab.

4) Review/Revision/Implementation:

- a) **Review Cycle:** This policy shall be reviewed by the Pathology Leadership every two (2) years from the effective date.
- b) **Office of Record:** After authorization, the Legal Department shall house this policy in a policy database and shall be the office of record.

5) Related Policies:

N/A

6) References, National Professional Organizations, etc.:

None

7) Attachments:

None

8) Revision Dates:

2/18

To whom it may concern:

I have reviewed and authorize the Procedure for Performing an Amendment to a Signed-Out Case policy.



Signature



Date

Gregory Pomper, MD
Medical Director of Clinical Laboratories
Wake Forest Baptist Medical Center