
	<b>Online Directory Additions and Modifications</b>  <b>Procedure ID-#</b>	<b>Dept:</b>	Pathology
		<b>Effective Date:</b>	2/14/19
		<b>Revised Date:</b>	New
		<b>Contact:</b>	Pathology Technical & Data Services Unit
<b>Title : CLIA Laboratory Director</b>		<b>Date:</b>	2/21/19
<b>Signature:</b> 			

**1) General Procedure Statement:**

**a. Scope:**

To provide technical and data services personnel with instructions for modifying the laboratory online directory as deemed appropriate by industry practices and regulatory agencies to assist in quality patient care.

**b. Responsible Department/Party/Parties:**

- i. Procedure owner: Pathology Technical & Data Services Unit
- ii. Procedure: Pathology Laboratories Personnel
- iii. Procedure prepared by: Pathology Technical & Data Services Unit  
Lisa Howlett  
Patricia Warren
- iv. Supervision: Medical Director Pathology Laboratories
- v. Implementation: Pathology Technical & Data Services Unit

**2) Definitions:**

- PTDSU Pathology Technical & Data Services Unit
- EAP Epic All Procedures uniquely identifying a laboratory test for orders and accounting
- OVT Epic Test Master to include details of the laboratory test linked to an EAP
- LRR Epic Result Component that's linked to an OVT
- MAC Media Access Control Address uniquely identifying a device
- DDL Data Definition Language
- DML Data Manipulation Language
- MS Microsoft

**3) Procedure:**

**a. Identify request for addition or modification**

- i. Each week, a ServiceNow custom report is manually run by PTDSU personnel to query the ServiceNow ticketing system for any change requests that have been submitted in the last 30 days that involve additions/changes to an EAP, OVT, LRR or references a MAC address for hardware.
- ii. Each month, a WakeOne custom report named Beaker\_All\_Tests is run manually by PTDSU personnel to generate a comprehensive list of tests built within Epic Beaker. In addition, a WakeOne custom report named WakeOne\_EAP is run automatically via

Report2Web to generate a comprehensive list of tests referenced within Epic Hyperspace. This report is automatically emailed to PTDSU Personnel.

- iii. PTDSU personnel review the change requests resulting from the ServiceNow report as well as cross compare the WakeOne EAP Report with the Beaker Report to identify the need for test(s) modification(s).

**b. Track Progress of Addition or Change**

- i. For each identifiable need for change, an entry is added to the Labs Issue Tracking list library located within Sharepoint.

<https://sp.wakehealth.edu/sites/pathology/Lists/LABS%20%20Issue%20Tracking/AllItems.aspx>

- ii. For each entry made in the Labs Issue Tracking list library, the PTDSU personnel create a corresponding folder within the dsulab shared network drive folder named change\_control to house scripts and documentation associated with the change.

\\medctr\dfs\wfusmpath\_cm1S\path\_labfolders\dsulab\change\_control\labs

- iii. PTDSU personnel add a record to the Master Change Control MS Excel spreadsheet, located in the same change control folder, that corresponds to each issue entered in the Labs Issue Tracking list library. Record the following fields:

Change Closed On	Date
Issue ID	Sharepoint Issue ID
Test ID/Name	Name in WakeOne(EAP)
Requestor OR Verified By	First and Last Name
Update Test Print	Yes/No/NA
Changed By	First and Last Name
Change Description	Description
Status	Active /Ongoing/Closed/Ready for Production/Resolved
Tested On	Date
Rollback Applied	Y/N
Rollback Reason	Reason Description
Change Control Form Available	Y/N
Notified?	Y/N

- iv. Export the change request from ServiceNow into a pdf format and store in the corresponding change control folder alongside any other documentation related to the change.

**c. Verify Request for Addition or Change**

- i. If the ServiceNow ticket does not already include the Laboratory Section Manager's approval for the change, seek approval via email. Store the approval communication as a pdf in the corresponding change control folder alongside any other documentation related to the change.

**d. Document and Implement Addition or Change**

- i. In Development environment, generate the necessary DML scripts to insert, update, delete data or DDL scripts to alter or modify structure for the Online Directory to satisfy the change request.
- ii. In Development environment, generate the necessary DML scripts to rollback the change in case that's necessary.
- iii. In Test Environment, execute the DML and/or DDL scripts
- iv. Create the Change Control MS Word document using the Change Control template describing the specific details that were required for the change including the testing that occurred in the Test Environment.
- v. Via Sharepoint, reassign the issue entered in the Labs Issue Tracking list library to the approving manager. An automated email is triggered to the manager indicating a review is necessary before the issue is moved to production.
- vi. Manager reviews issue in the Labs Issue Tracking list library. If approved, the approval is noted within the issue and the issue is reassigned to the appropriate PTDSU personnel. In addition, the manager updates the Change Control document with the approval date. If not approved, the issue is routed back to the appropriate PTDSU personnel for further review.
- vii. If approved, the assigned PTDSU personnel executes the DML and/or DDL scripts in Production
- viii. The Test Print is updated, if necessary and a copy is saved to the issue's change control folder.
- ix. The ServiceNow ticket is closed and as is appropriate, with resolution comments.

**4) Review/Revision/Implementation:**

- a. Review Cycle: 2 years
- b. Office of Record: Pathology Technical & Data Services Unit
- c. All new procedures and procedures that have major revisions must be signed by the Laboratory Director.
- d. All reviewed procedures and procedures with minor revisions can be signed by the designated section medical director.

**5) Related Procedures: N/A**

**6) References, National Professional Organizations, etc.: N/A**

**7) Attachments:**

- a. Master CARSPRD Change Control Template

**Revision Dates:**

<b>Review Date</b>	<b>Revision Date</b>	<b>Signature</b>



<b>CARSPRD Change Control Form</b>		
<b>SharePoint Issue ID:</b>		
<b>Application:</b> LABS		
<b>Impact Level:</b> <input type="checkbox"/> Field <input type="checkbox"/> Apex <input type="checkbox"/> Structure <input type="checkbox"/> Trigger/Procedure <input type="checkbox"/> View		
<b>Details of Changes:</b>		
<b>Risks:</b> Low/Medium/High		
<b>Rollback Plan:</b>		
<b>Tested By:</b>	<b>Date:</b>	
<b>Testing Details</b>		
<b>Approval</b>		
<b>Approval date:</b>	<b>Approved by:</b>	
<b>Action Taken:</b>		
<b>By:</b>	<b>Date:</b>	<b>Time:</b>

Revised 5/20/2014

CARSPRD Change Control Form

**Details of Changes (continued):**

Empty rectangular box for change details.

Revised 5/20/2014