

<b>PATIENT PROFILES &amp; MAKING A PATIENT KNOWN IN SAFETRACE</b>
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|---|---|--|
| <input checked="" type="checkbox"/> St. Joseph Medical Center, Tacoma, WA | <input checked="" type="checkbox"/> St. Anthony Hospital Gig Harbor, WA | <input type="checkbox"/> Harrison Medical Center, Bremerton, WA  |
| <input checked="" type="checkbox"/> St. Francis Hospital, Federal Way, WA | <input checked="" type="checkbox"/> St. Elizabeth Hospital Enumclaw, WA | <input type="checkbox"/> Harrison Medical Center, Silverdale, WA |
| <input checked="" type="checkbox"/> St. Clare Hospital Lakewood, WA       | <input type="checkbox"/> Highline Medical Center Burien, WA             | <input type="checkbox"/> PSC                                     |

**PURPOSE**

To describe how to open a patient profile and define the process whereby a patient not currently found in SafeTrace (Tx) can be electronically brought into Safetrace Tx database.

**BACKGROUND**

SafeTrace Tx is an LIS Blood Bank program which is independent of Epic. When a patient is registered in Epic, the patient information is available to Safetrace, but that information will remain in the background until an order for Blood Products or TS Testing is placed. The process of pulling the existing Epic information into Safetrace where that patient and that encounter (CSN) can be used is the process of making a patient “Known”. If you can find the patient in Epic or Beaker you should be able to make them “Known” to Safetrace TX.

**RELATED DOCUMENTS**

- |              |   |
|--------------|---|
| M-W-TS-0330  | Patient Visit Management                            |
| M-W-TS-0311  | Emergency Release of Blood Products – Known Patient |
| M-PO-TS-0347 | Emergency Release Policy – SAH, SCH, SEH, SFH       |
| M-W-TS-0330  | Patient Visit Management                            |

**STEPS**

**A. OPENING A PATIENT PROFILE**

1. In the Patient Order Module: Select **File > Open > Patient**. The Open Patient window opens.

Open Patient

Patient ID:  SSN:  Enterprise ID:

HC#:   Include Merged Patients

Name

Last:  First:

Middle:   Sounds Like

Service Provider:

MR No:  Gender:

Payer Provider:

Account No:  Birth Date:

External ID:  Patient Status:

Patients								
Patient ID	C/P	Status	Service Provider	MR No	C/P	SSN	Birth Date	Gen

2. Enter the patient's last name with first name or another unique identifier to search for the patient, and then click **Query**.

**Note:** Do not use the MRN as search criteria as patients may have a conversion history in SafeTrace.

Open Patient

Patient ID:  SSN:  Enterprise ID:

HC#:   Include Merged Patients

Name

Last:  First:

Middle:   Sounds Like

Service Provider:

MR No:  Gender:

Payer Provider:

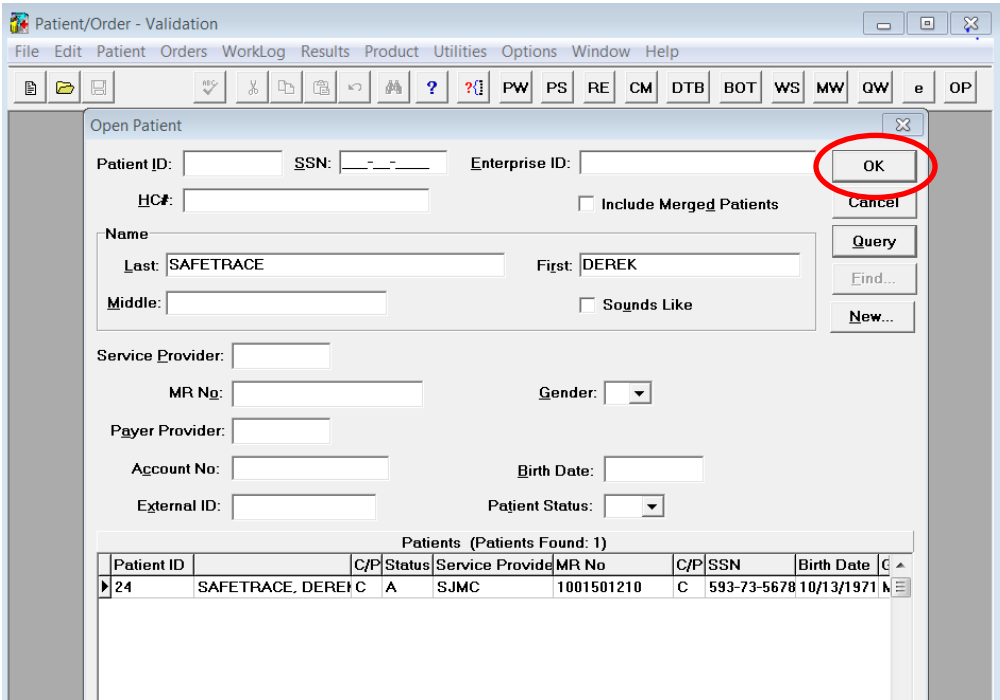
Account No:  Birth Date:

External ID:  Patient Status:

Patients								
Patient ID	C/P	Status	Service Provider	MR No	C/P	SSN	Birth Date	Gen

3. If patients exist that match the search criteria, the records display in the "Patients" grid of the "Open Patient" form. If no patients exist, a popup box stating "No possible Matches Found" will appear. Go to section B "Making a Patient Known" below.

4. Carefully review any names in the Patients Grid to ensure **names and DOB** match. Select the correct row in the grid and click the **OK** button. Patient information will populate all the fields. **Note:** If clicking OK results in a new window prompting to “Select Patient from ADT Holding”, choose the one for your hospital.



5. If there is a *partial match* with a patient visit in ADT, the *Choose to Make ADT Visit(s) Available-Update patient Information from ADT Holding* window **opens**. This requires a review of the information about to be updated.

Choose to Make ADT Visit(s) Available - Update Patient Information from ADT Holding

Patient ID: [Redacted] **Yes** **No** **Cancel**

Patient and ADT MRN for Provider  
 Provider ID: SJMC St. Joseph Medical Center  
 Patient MRN: [Redacted] ADT MRN: [Redacted]

ADT Visit(s) For MRN To Be Made Available If Chosen (Records Found: 1)

Patient Visit Type	Admission Date	Discharge Date	Location ID	Sub-Location
0 Outpatient visit	02/13/2017		SJMC	SAHMMP

Hematology Results in Holding? No

Patient Information To Be Updated If Chosen (Records Found: 3)

Change Indicator	Information Type	Current	ADT
*	Ethnicity	8	1
*	Contact Name - Friend		[Redacted]
*	Contact Phone - Friend		[Redacted]

Patient Information That Matches ADT Information (Records Found: 11)

Information Type	Current	ADT
Date of birth	[Redacted]	[Redacted]
Patient First name	[Redacted]	[Redacted]
Gender	[Redacted]	[Redacted]
Patient Last name	[Redacted]	[Redacted]

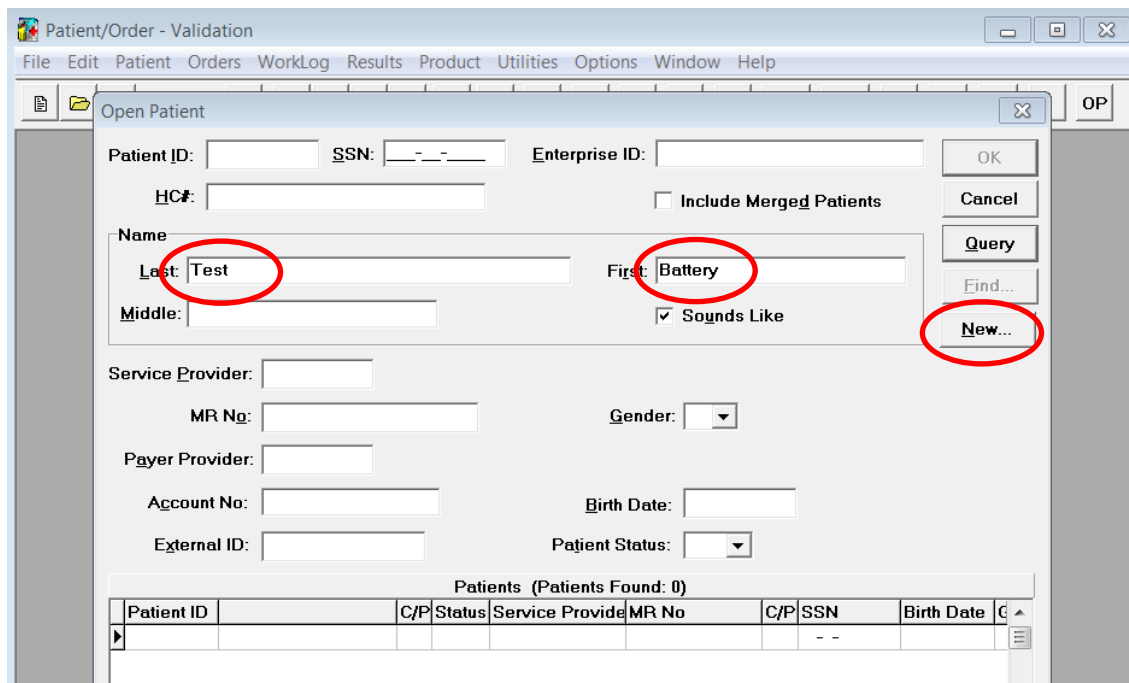
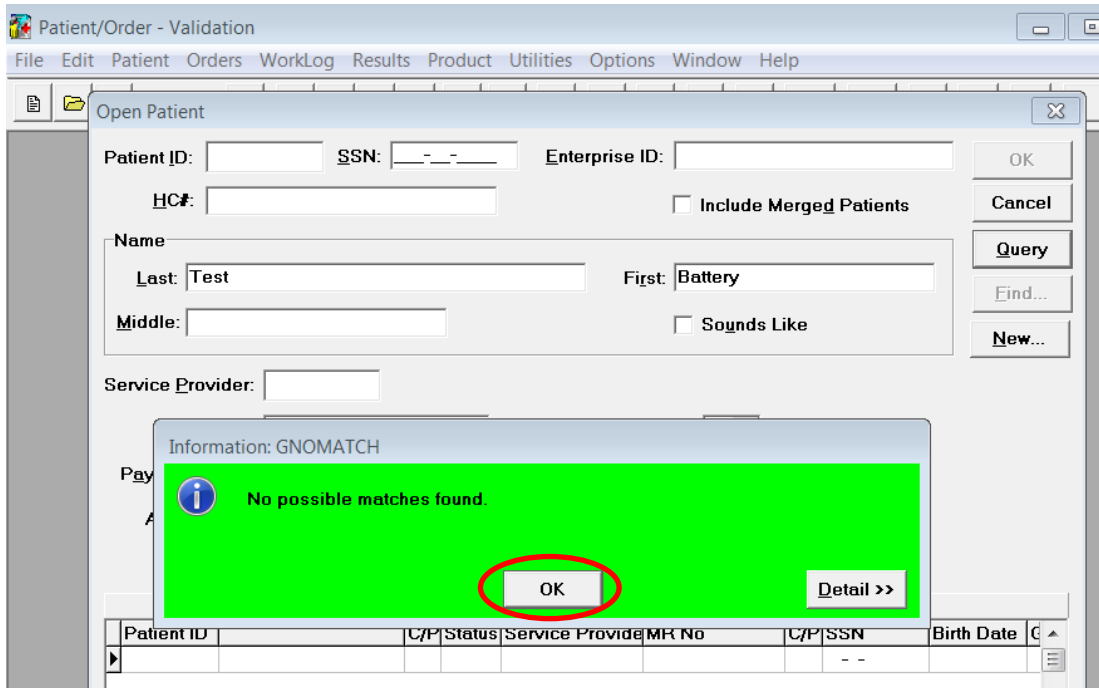
- Note 1:** The *Patient Information to be Updated If Chosen* grid (the middle grid), identifies the patient data (Information Type) that **differs** between the SafeTrace Tx record (Current column) and the new admission information (ADT column).
  - Note 2:** The *Patient Information That Matches ADT Information* grid (the lowest grid), identifies the patient data (Information Type) that **matches both** the SafeTrace Tx record (Current column) and the new admission information (ADT Column). In the above Print Screen, Patient information has been redacted, however the Patient Name, Gender and DOB in both the Current and the ADT columns were identical to each other.
6. If the patient ADT info in the bottom grid has matching first, last name gender and DOB, choose **Yes** and click **OK** to accept ADT info. This will update the record in SafeTrace Tx. The Patient Profile will open with new ADT information. **NOTE:** If a pop-up “Warning Code: GT1259” stating “Patient information in the application will be changed”. Click “**OK**” and if prompted for a comment, type in “**Update**”. These steps update any registration information that has changed since their last visit such as a phone number or emergency contact information.
7. If *none of the patients in the Grid are the correct match*, click NEW and follow steps below (start at B. 2) for Making a Patient Known. **IMPORTANT NOTE:** If multiple files for the same patient are found (different Patient IDs) the files will need to be merged – contact Transfusion Services Department at SJMC or HMCB as appropriate.

**B. MAKING A PATIENT KNOWN**

1. If patients in the system match the search criteria, they appear in the Patients grid. This list should be checked carefully. When the patient does not exist in the system, a message will appear stating 'No possible matches found'. Always click the detail button for more information. Click **OK** on the green factor to close it.

Or patients may exist in the system that populate the grid, but are non-matching patient(s) of same name and different birthday.

**NOTE:** Be sure that the information entered was typed/spelled correctly. In Safetrace, Middle Name is a separate field. Typing the first 3 letters of the last and first name may expand your search.



- Click the 'New' button and a list of *ADT Holding Patients* is displayed. Review any listed patients which match the search criteria, taking care to double-check name and DOB. Highlight the matching patient and click OK.

Open Patient from ADT Holding

SSN: [ ]- [ ]- [ ] Enterprise ID: [ ]

Name  
 Last: wilson First: OK  
 Middle: [ ]  Sounds Like

Gender: [ ]  
 Birthdate: [ ] HCB#: [ ]  
 Service Provider: [ ]  
 MR No: [ ]  
 Account No: [ ]

ADT Holding Patients

Patient Name	Service Provider	MR No	SSN	Birth Date	Gender
WILSON, OK	SJMC	00000+00	- -	(00/00/0000)	Female
WILSON, OK	SJMC	[ ]	- -	[ ]	Female
WILSON, [ ]	SFH	[ ]	- -	[ ]	Female

- The *New Patient – Using ADT Holding Defaults* window opens.

If this is the correct patient, click the **ADT Visit** button. (If not correct patient, click Cancel to return to the Open Patient window and retry the search.) The *ADT Visit Holding* window will open.

New Patient - Using ADT Holding Defaults

Name  
 Last: [REDACTED] First: [REDACTED]  
 Middle: [REDACTED] Prefix: [REDACTED] Suffix: [REDACTED]

SSN: [REDACTED] Enterprise ID: [REDACTED]

Gender: M Male No of Pregnancies: [REDACTED] Ethnicity: [REDACTED]

Birth Date: [REDACTED] Mother's Patient ID: [REDACTED]

HCH: [REDACTED]

Current Visit Information

Admission Date: 04/03/2018 Visit Type: 0 Outpatient visit Discharge Date: [REDACTED]

Service Provider: SJMC St. Joseph Medical Center MR No: [REDACTED]

Admit. Physician: [REDACTED] Patient Location: SJMC - SJMCED-B

Paygr Provider: SJMC St. Joseph Medical Center Account No: [REDACTED]

Diagnosis: [REDACTED]

Buttons: OK, Cancel, Find..., **ADT Visit...**

4. Select the visit with the current admission date. Click OK or double click, the window will close and the visit information will populate the New Patient file.

ADT Visit Holding

Patient ID: [REDACTED]

Buttons: **OK**, Cancel

ADT Visit				
Service Provider ID	MR No	Visit Number	Account No	Admission
SJMC	[REDACTED]	[REDACTED]	[REDACTED]	04/04/20
SJMC	[REDACTED]	[REDACTED]	[REDACTED]	03/18/20

ADT Visit Provider	
Provider Role	Provider ID
Attending physician	[REDACTED]

5. Click **OK** to open the Patient Profile and check the patient history.

The screenshot shows a software dialog box titled "New Patient - Using ADT Holding Defaults". It contains several input fields and buttons. The "Name" section includes Last, First, Middle, Prefig, and Suffix. The "SSN" field has dashes. "Enterprise ID" is a text field. "Gender" is a dropdown menu set to "Male". "No of Pregnancies" is a text field. "Ethnicity" is a dropdown menu. "Birth Date" is a date field. "Mother's Patient ID" is a text field. "HCB#" is a text field. The "Current Visit Information" section includes "Admission Date" (04/03/2018), "Visit Type" (0), "Discharge Date", "Service Provider" (SJMC - St. Joseph Medical Center), "MR No.", "Admit. Physician", "Patient Location" (SJMC - SJMCED-B), "Payer Provider" (SJMC - St. Joseph Medical Center), "Account No.", and "Diagnosis". On the right side, there are buttons for "OK", "Cancel", "Find...", and "ADI Visit...". The "OK" button is circled in red.

### C. POTENTIAL DUPLICATE PATIENTS

The system will alert the user when a new patient is entered whose information closely resembles the information for a patient that exists in the system, by opening a *Display Duplicate Patients* window. The Patient whose info you just entered will display at the top and the potential duplicate(s) will appear in the grid at the bottom.

1. Carefully compare the information for the patient just entered with the patient that exists in the system. Determine whether the patient is a duplicate.

- If the situation needs to be investigated further before making a decision, click **Cancel**
- If it is determined that the patients are duplicates (the same patient) click **Cancel**. Open the patient profile for the existing patient, and check the patient history, or whatever task you were performing.
- If it is determined that the patients are not duplicates, click **OK**. This creates your patient as a new patient in the system. (A yellow pop-up window will alert you to this; click **OK**).

**NOTE:** When creating a new patient with closely matching identifying information, the system may ask the user again if this patient is a duplicate patient by opening the *Display Duplicate Patients* window. To tell the system to stop asking if this patient is a duplicate patient, define the Patient as Not a Duplicate. In the Duplicate Patients grid change the "Y" in the Show as Duplicate column to an "N" and enter a required comment in the Comment column (e.g., Gender mismatch, or DOB mismatch). This step may be left for later or for SJMC or HMC TS staff.

### REFERENCES

Safetrace TX Patient/Order education (E-0011.0, July 2015)