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| University of Washington,  Harborview Medical Center  325 9th Ave. Seattle, WA, 98104  Transfusion Services Laboratory  Policies and Procedures Manual | Original Effective Date:  September 15, 2011 | Number:  5011-2 |
| Revision Effective Date:  8/15/12 | Pages:  2 |
| TITLE: Updating Patient Demographics in Sunquest to Match EPIC Registration Changes | | |

Purpose:

To describe the procedure used to update the Sunquest record when ORCA name corrections do not cross the ORCA/Sunquest interface electronically.

Procedure:

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| Step | Action | Related Document |
| 1. | Patient Name Changes   * When patient name changes or corrections are made in the Epic Registration system but the change has not crossed the interface into Sunquest, the following may occur: * The previous name shows up in SQ when the MRN is queried. * The ORCA labels, armband, requisitions all have the new name. * There is no record of the new/corrected name in Sunquest. * The active sample may have been collected and labeled when the previous name was active in ORCA—prior to the change. A new sample with the corrected name must be drawn and retested. * Blood products may have been crossmatched when the previous name was active in ORCA—prior to the change. These products will have to be crossmatched with a confirmation sample. |  |
| 2. | * Verify that the new/corrected name was the same patient as the previous name by signing in to EPIC Web and checking the alias names. * Sign into ORCA power chart using your UW medicine sign on. * Search by the new/corrected name and MRN. * Choose Epic Web from the menu bar on the left side of the screen. * Choose Patient Profile from the Menu bar on the left side of the Epic screen. * Under Demographics, look for patient alias names. The previous name must appear in order to ensure that the both names belong to the original patient. * Print the Patient Profile page and attach it to the Patient Demographic Correction Form * Get review by a second technologist. * Leave for review by TSL manager. | Patient Demographic  Correction Form |
| Step | Action | Related Documents |
| 3. | Patient Name or DOB corrections due to typos or misspellings  NOTE: Any name *change* must be verified by following the actions in Section 2 above before making a change in Sunquest. If the alias does not appear, the Sunquest change cannot be made without manager approval. |  |
| 4. | * If there was correction of a misspelling or typo during registration (can be either name or DOB), or if there was a name change that is verified in EPIC WEB with an alias, the patient information can be corrected/changed in Sunquest as follows: * Sign into Sunquest * Go to Admin Data Entry * Enter the patient’s MRN * Make a screen print of this screen, marked “before”. * Change the demographic information to reflect the new Epic Registration information. * Include any changed elements, i.e. name, MRN, DOB. * NOTE: Trauma DOB (1/1/1888) should be changed to actual DOB. * Click on the “SAVE” button on the screen. * Take a screen shot and print this screen, mark it “After” * Attach both the “Before” and “After” printouts to the Patient Demographic Correction Form. * Get review by a second technologist. * Leave for Manager review. |  |