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| University of Washington, Harborview Medical Center325 9th Ave. Seattle, WA, 98104Transfusion Services LaboratoryPolicies and Procedures Manual | Original Effective Date: September 15, 2011 | Number: 5011-2 |
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| 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.
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| 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 DemographicCorrection Form |
| Step | Action | Related Documents |
| 3. | Patient Name or DOB corrections due to typos or misspellingsNOTE: 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.
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