MEDSTAFF - CMO BLAST (ATTACHMENTS): Epic Upgrade on Saturday 10/20

From:	Tucker, Amy (Heidi Chapman)
Date:	10/18/2018 2:47 PM
Subject:	CMO BLAST (ATTACHMENTS): Epic Upgrade on Saturday 10/20
CC:	(CC-Active) APPs; (CC-Active) Anesthesia ; (CC-Active) ENT; (CC-Activ...
Attachments:	Upstate_2018 Epic Upgrade Slides_PowerPoint_by App_Inpatient and Ambulatory_1_1_1.pdf; CLINICAL Users_Pref Name_GenderID_Education_10122018_2.pdf

Attached please find the Epic Upgrade document and education referenced, below.

>>> Tucker, Amy (Heidi Chapman) 10/18/2018 2:39 PM >>>
Epic Upgrade on Saturday 10/20

The Epic Production System will be taken off line Saturday, October 20, 2018 from 3AM to 6AM, as it is upgraded to Epic Version 2018. The Hyperspace Downtime Read Only System WILL be available during this time. Users are reminded to review downtime procedures to prepare.

Please create a HEAT ticket online or contact the Help Desk if there are any questions or concerns once we are live with Epic 2018.
http://www.upstate.edu/imt/intra/helpdesk/index.php

Attached, please find an Epic Upgrade document which in includes links to highlights for each Epic application.

Please take note that in this new version (Epic 2018) there are many changes that affect patient legal name, preferred name, gender identity, and sex. The changes are meant to respect and protect our patient population here at Upstate. Also attached, is a a document outlining these changes.

The Gender Identity Committee has been working very closely with Epic as well as with our IMT Department to review and adjust these changes as needed when possible.

Please review the attached education closely regarding these changes to the system and familiarize yourself with the appropriate terminology and definitions. The Gender Identity Committee will continue to meet and make adjustments to Epic as needed when problems are identified. Please reach out to us if there are any questions or suggestions once we are live with Epic 2018.

Here's hoping for a smooth EPIC upgrade!

Best,

Amy

Amy Tucker, MD, MHCM
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Associate Dean for Clinical Affairs, College of Medicine, Upstate Medical University
Vice President, Ambulatory Services & Population Health

IMT Training Team
Inpatient and Ambulatory Applications
2018 Epic Upgrade Resource Links

Epic

Emergency Department (ASAP)

Good to Know

Emergency Department- ASAP 2018 Upgrade Slides

Inpatient Providers (Orders)

Good to Know

[Inpatient Providers- Orders 2018 Upgrade Slides](#)

Inpatient Nurses (ClinDoc)

Good to Know

[Inpatient Nurses- ClinDoc 2018 Upgrade Slides](#)

Anesthesia / OpTime (Perioperative Areas)

Good to Know

OpTime- 2018 Upgrade Tip Book

Anesthesia- 2018 Upgrade Book

Ancillary Services (ClinDoc)

Ancillary Services- Clindoc 2018 Upgrade Slides

Radiology (Radiant)

L&D / Postpartum (Stork)

L&D/Postpartum- Stork 2018 Upgrade Slides

ICON (Infection Control)

[Good to Know]

Fall 2018 Epic Upgrade Information for Infection Control

Beacon

Beacon Epic 2018 Update Slides

Willow (Pharmacy)

Willow Pharmacy- 2018 Upgrade Slides

Hospital Billing (Resolute)

[Hospital Billing- Resolute HB 2018 Upgrade Slides](#)

Health Information Management (HIM)

HIM- 2018 Upgrade Slides

ADT / Grand Central

Ambulatory Clinical

Ambulatory CPW

Ambulatory PB

[Ambulatory Professional Billing- Resolute PB 2018 Upgrade Slides](#)

Legal Name, Preferred Name, and Gender Identity

Epic v.2018
Go-Live: Saturday October 20, 2018

Training Module for Clinical Users

Note: Links embedded throughout this PowerPoint are accessible when connected to the Upstate network.

Epic

Information for All Users

Preferred Name and Gender Identity

On **Saturday October 20, 2018**, Upstate will upgrade its current Epic system to the latest version of Epic (Epic v.2018). As with any upgrade, users can expect to see a number of changes and / or new features in the system.

Epic v.2018 includes ***changes of great importance to our patients, their safety and care, and to our staff*** *related to* ***a patient's preferred name and gender identity***.

Patient Name Terminology

Term	Defined as:
Legal Name	The name that identifies a person for legal or official purposes.
Preferred Name	The name that may be chosen to be used instead of the legal first name.

Important Note: The Preferred Name field is <u>not to be used for</u> phonetic pronunciation, legal first name, or comments / notes. The purpose of the Preferred Name field is to capture the name by which a patient wishes to be called. Related, the Preferred Name Type field will be populated by default by Epic and <u>should not be modified by any user</u>. If Preferred Name Type is deleted, Epic will auto-populate it again, but if a user modifies the information in this field it may cause print / display issues.

Reference: Fast Facts for Preferred Name and Gender Identity, September 2017

Patient Sex Terminology

Good to Know

Term	Defined as:
Sex Assigned at Birth	The sex (male or female) assigned a child at birth, based on a child's genitalia.
Birth Sex	*Synonym for Sex Assigned at Birth*
Natal Sex	*Synonym for Sex Assigned at Birth*
Sex (Legal)	The sex that is listed on legal or official documents.

Reference: Fast Facts for Preferred Name and Gender Identity, September 2017

Gender Terminology

Good to Know

Term	Defined as:
Gender Identity	A person's internal sense of being; a man, woman, both, or neither. Gender identity usually develops at a young age.
Binary Gender (Gender Binary)	Gender as two distinct classifications, masculine (male) or feminine (female).
Cisgender (Cisgender male or cisgender female)	Gender identity that corresponds to birth sex.
Non-Binary Gender	Gender that is something other than male or female.
Transgender	People whose gender identity is not the same as the sex they were assigned at birth.
Female-to-Male (Transgender Male)	A person born with female genitalia at birth who feels they are male / a man and lives as a male / a man. Some will just use the term male.
Male-to-Female (Transgender Female)	A person born with male genitalia who feels they are female / a woman and lives as female / a woman. Some will just use the term female.

Reference: Fast Facts for Preferred Name and Gender Identity, September 2017

Gender Identity Abbreviations in Epic

Good to Know

Abbreviation	Gender Identity
F	Female
M	Male
MTF	Transgender Female (Male to Female)
FTM	Transgender Male (Female to Male)
OTH	Other
~~ND~~	~~Not Disclosed~~
GEN NEU	Gender Neutral

Important Note: The gender option for "Choose Not to Disclose" is removed as of October 20, 2018.
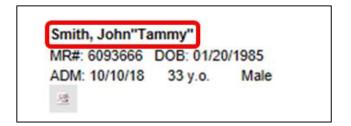
Patient Labels & Wristbands

Patient Labels
- Display Legal Last Name, Legal First Name "Preferred Name"
- Display Legal Sex

Example

Smith, John"Tammy"
MR#: 6093666 DOB: 01/20/1985
ADM: 10/10/18   33 y.o.   Male

Patient Wristbands
- Display Legal Last Name, Preferred First Name on the top line
- Display Legal First and Last Name on the second line
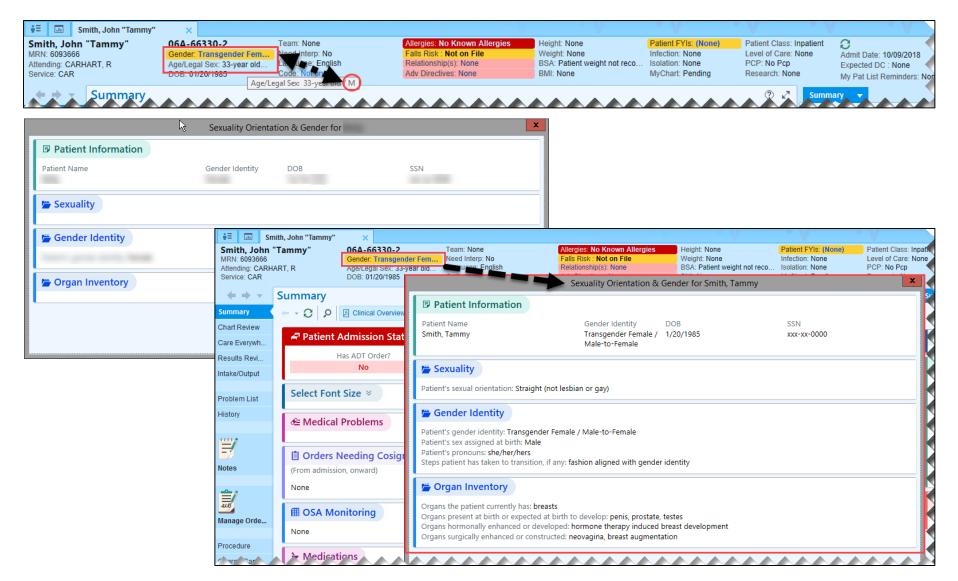- Display Legal Sex

Example

SMITH, TAMMY
Legal: John Smith
DOB: 01/20/1985 ADM:
10/09/18
MRN#: 6093666   33 y.o.
Male

Patient Header Updates

Critical!

All users can expect to notice changes in the Patient Header related to Preferred Name and Gender Identity.

- **The Patient Header is the most reliable** and consistent display of patient sex and gender at the time of Epic v.2018 upgrade on October 20, 2018.
- To accommodate new fields and displays of information in the header, some items may have moved in the Patient Header.
- Gender in the Patient Header will be highlighted in yellow if Epic notices a mismatch in documented gender, sex, and sex assigned at birth.
- Users can click on Gender in the Patient Header to be directed to the Sexual Orientation and Gender report that will provide important data related to the patient's gender identity, sexuality, and organ inventory.

Important Note: Please review for images illustrating these features / changes.

Patient Header Updates *(Cont.)*

Patient Lookup

Critical !
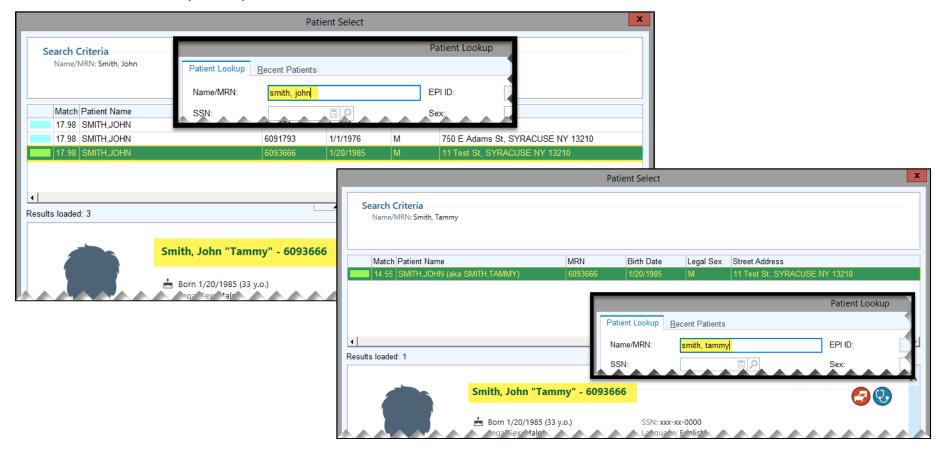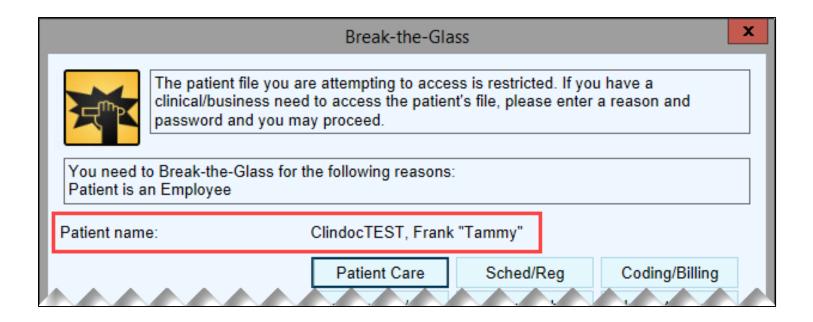
Patient Lookup will recognize and search on both a patient's legal and a patient's preferred name. For example, Smith, John "Tammy" can be found when searching for Smith, John and when searching for Smith, Tammy. Users can also search for patients by Medical Record Number (MRN).

Break-the-Glass

Both a patient's Legal Name and their Preferred Name will display on Break-the-Glass prompts formatted as Legal Last Name, Legal First Name "Preferred Name".

In Basket

The In Basket sidebar when reviewing a message will display different information based on the folder in which you are viewing messages. Most will display Legal Last Name, Preferred Name and Gender Identity. Most importantly, critical folders such as Results and Rx Requests will have a print group displaying Demographic Information.

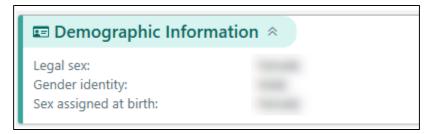**Example: Sidebar**

Example: Demographic Info

Smith, Tammy ↗
Female, 33 y.o., 1/20/1985
Weight: None
Phone: 315-666-4422 (H)
PCP: No Pcp

MRN: 6093666
MyChart: Pending
Next Appt: None

▣ Demographic Information ⌃

Legal sex:
Gender identity:
Sex assigned at birth:

SmartLinks

SmartLinks help users to customize their documentation (i.e., in notes or letters) by pulling data from the patient's chart. Many SmartLinks are available for patient name, gender, and sex. With the changes for Preferred Name and Gender Identity, new SmartLinks are available and the description of each is clearly defined so users are aware of exactly what will populate when using a specific SmartLink. Please review the tip sheet below for details.

- Preferred Name & Gender Identity SmartLinks for Note and Letter Writing

Information by Specific Role or Application

Continue to next slide for a Table of Contents to quickly advance to the slide specific to your role or application, if applicable.

Table of Contents

Use the Table of Contents to advance to slides specific to your role or Epic application.

Emergency Department (ASAP)

- [System Update Bulletin: Preferred Name & Gender Identity for ED PAS and Clinicians](#)

Inpatient Clinicians - General

Good to Know

- [System Update Bulletin: Patient Lists Updates for Preferred Name and Gender Identity](#)

- [Preferred Name & Gender Identity SmartLinks for Note and Letter Writing](#)

Anesthesia / OpTime (Perioperative Areas)

- [System Update Bulletin: Preferred Name & Gender Identity for OpTime and Anesthesia](#)

Ancillary Services (ClinDoc)

- [Tip Sheet: Find a Patient's Preferred Name and Gender Identity](#)

Radiology (Radiant)

- [System Update Bulletin: Patient's Preferred Name and Gender Identity Info for Radiology](#)

L&D / Postpartum (Stork)

- [Stork: Preferred Name & Gender Identity Updates](#)

Ambulatory Clinicians - General

Good to Know

- [System Update Bulletin: Preferred Name and Gender Identity for Ambulatory Clinicians](#)
- [Preferred Name & Gender Identity SmartLinks for Note and Letter Writing](#)

Legal Name, Preferred Name, and Gender Identity

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