

<b>GUIDELINES TITLE</b>	<b>UW SPS – Create: Case Account Verification in hc1</b>		
<b>DOCUMENT ID</b>	<b>WRITTEN BY</b>	Angela Yu	
<b>EFFECTIVE</b>	04/2018	<b>APPROVED BY</b>	
<b>PURPOSE</b>	To establish guidelines for SPS to verify the account mnemonic in hc1. <i>If the account mnemonic cannot be verified in hc1 – To communicate an account verification request to Client Support Services (CSS), a Case must be created in hc1.</i>		
<b>REQUIRED EQUIPMENT &amp; FORMS</b>			
<b>GUIDELINES</b>	<ol style="list-style-type: none"> <li>1. Access “<b>uw.hc1.com</b>” website, (<i>hc1 is optimized for Google Chrome web browser</i>).</li> <li>2. Login with UW AMC credentials.</li> <li>3. Click on the <b>Organizations</b> tab.</li> <li>4. Click on the drop down list underneath the Organizations title and chose the <b>All Organizations</b> filter: <div data-bbox="337 898 1523 1054" data-label="Image"> </div> </li> <li>5. Click on the <b>Quick Filter</b> link on the top right of the list: <div data-bbox="337 1159 1523 1314" data-label="Image"> </div> </li> <li>6. Choose the following choices from the drop down selections: <ol style="list-style-type: none"> <li>a. <b>Filter by:</b> “Mailing Address Postal Code” or “Mailing Address City”</li> <li>b. <b>Operator:</b> Begins With</li> <li>c. <b>Value:</b> Enter the Postal Zip Code or City provided.</li> <li>d. Click on the <b>Apply</b> button to search for account mnemonics that match the filter criteria.</li> </ol> <p><b>*Important Note –</b></p> <ul style="list-style-type: none"> <li>• There are clients that will stamp the reference lab information on other parts of the requisition or include logging information on the additional pages, please be aware and look for those.</li> <li>• Shipping labels are <b>not</b> an acceptable source of account location information. They should still be kept for CSS follow-up.</li> </ul> </li> </ol>		

7. Confirmation of the correct account mnemonic should include the following **matching** between the requisition and hc1:

- **Address**


**AND**

- **Phone number OR Fax number** (Including any of the listed main numbers or additional **Important Contacts** see below for steps for viewing)

**\*Important Note –**




- **Often the name of the Organization will not match exactly between the requisition and hc1. There is a limit in the number of characters (30 max) that we can use for the Organizations name.**

8. All of the contact phone and fax numbers for an account mnemonic (ex. CHAMAI) are located under a single Organization page. The additional phone and fax numbers are listed under **Important Contacts**:

**Carolina Med Ctr Main**  Find Duplicates Edit

Mailing Address: 1000 Blythe Blvd 4th Fl, Attn Lab, Charlotte, NC, 28203  
Phone: (704) 355-5434 | Fax: (704) 355-6326  
Host Codes: CHAMAI

General Information | Location & Contact Information | **Contacts** | Fee Schedules | Child Organizations | Courier Routes

Location Type	Sunquest Location	<b>Important Contacts</b>	
Org Billing Account	0	 Main Lab CHAMAI	704-355-5943
Event Type	OSA	 JONATHAN FROMM	jfromm@uw.edu
Event Type Group	os uw	 ELTON SMITH	(704) 355-5434
Specialties		See all Important Contacts	
FedEx Account #			

9. Additional **Important Contacts** are listed under the **Contacts** tab or by clicking **See all Important Contacts** (ex. SEALPS):

**Dynacare Labs**  Find Duplicates Edit

Mailing Address: 550 17th Ave Ste 300, James Tower- Life Sciences Bldg, Seattle, WA, 98122  
Phone: (206) 861-7271 | Fax: (206) 861-7363  
Host Codes: SEALPS

General Information | Location & Contact Information | **Contacts** | Fee Schedules | Child Organizations | Courier Routes

Location Type	Sunquest Location	<b>Important Contacts</b>	
Org Billing Account	0	 Alternate Fax 2 SEALPS	Fax (206) 292-9028
Event Type	OSA	 Alternate Fax 1 SEALPS	Fax (206) 861-7350
Event Type Group	os uw	 Specimen Processing Fax SEALPS	Fax (206) 861-7424
Specialties		See all Important Contacts	
FedEx Account #			

10. The additional **Important Contacts** listed under the **Contacts** tab will have:

- “*Account Mnemonic*”, Description (Last name, First name)
- **Primary** will be checked off
- **Contact Type** = Rolodex

	Name	Role	Phone	Email	Primary	Contact Type
	SEALPS,Specimen Collection		(206) 861-7000		<input checked="" type="checkbox"/>	Rolodex
	SEALPS,Alternate Fax 1		Fax (206) 861-7350		<input checked="" type="checkbox"/>	Rolodex
	SEALPS,Specimen Processing Fax		Fax (206) 861-7424		<input checked="" type="checkbox"/>	Rolodex
	SEALPS,Alternate Fax 2		Fax (206) 292-9028		<input checked="" type="checkbox"/>	Rolodex
	SEALPS,Specimen Processing		(206) 861-7263		<input checked="" type="checkbox"/>	Rolodex

11. Please log in patients based on the following guidelines after comparing the information provided on the requisition to the account information in hc1:

- **Two** matching pieces of information – log to account mnemonic provided by hc1
- **Zero** matching pieces of information – log to **OTHER** account mnemonic.
- **One matching and/or discrepancies** – please bring this to the attention of CSS.

12. Discrepancies can be brought to CSS attention in two ways:

1. If CSS is available they can provide a quick confirmation.
2. If CSS is unavailable for a quick confirmation of an account mnemonic, please log patient in under the **OTHER** account mnemonic with:
  - **HC1TIQ** test code
  - “**X\_\_**” Extra Sample Type test code, ex. if the sample is a GO, log “XGO”, etc.

Complete details of Case in hc1 following proper guidelines.

<b>REFERENCES</b>	
<b>REVISION HISTORY</b>	Angela Yu – Supervisor CSS – 04/12/2018 Angela Yu – Supervisor CSS – 05/03/2018