

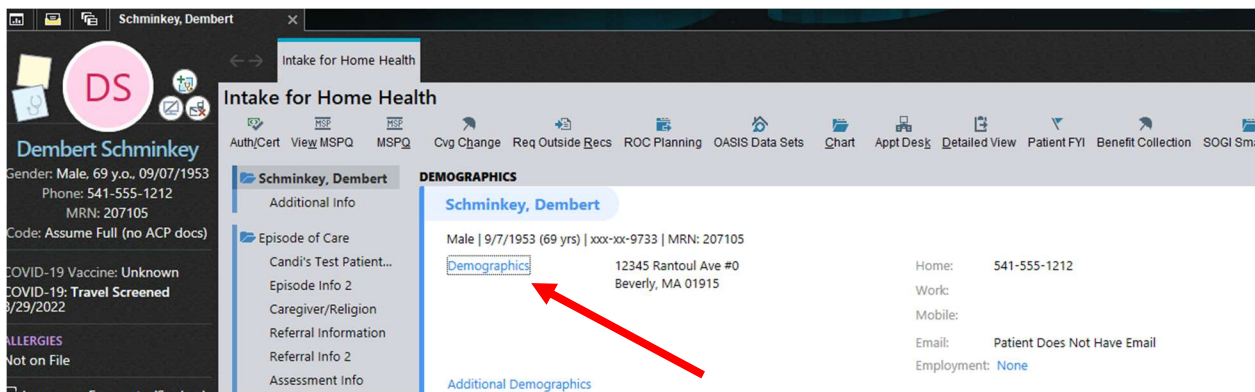
# EpicEdge Tips & Tricks

## Documenting Preferred Names

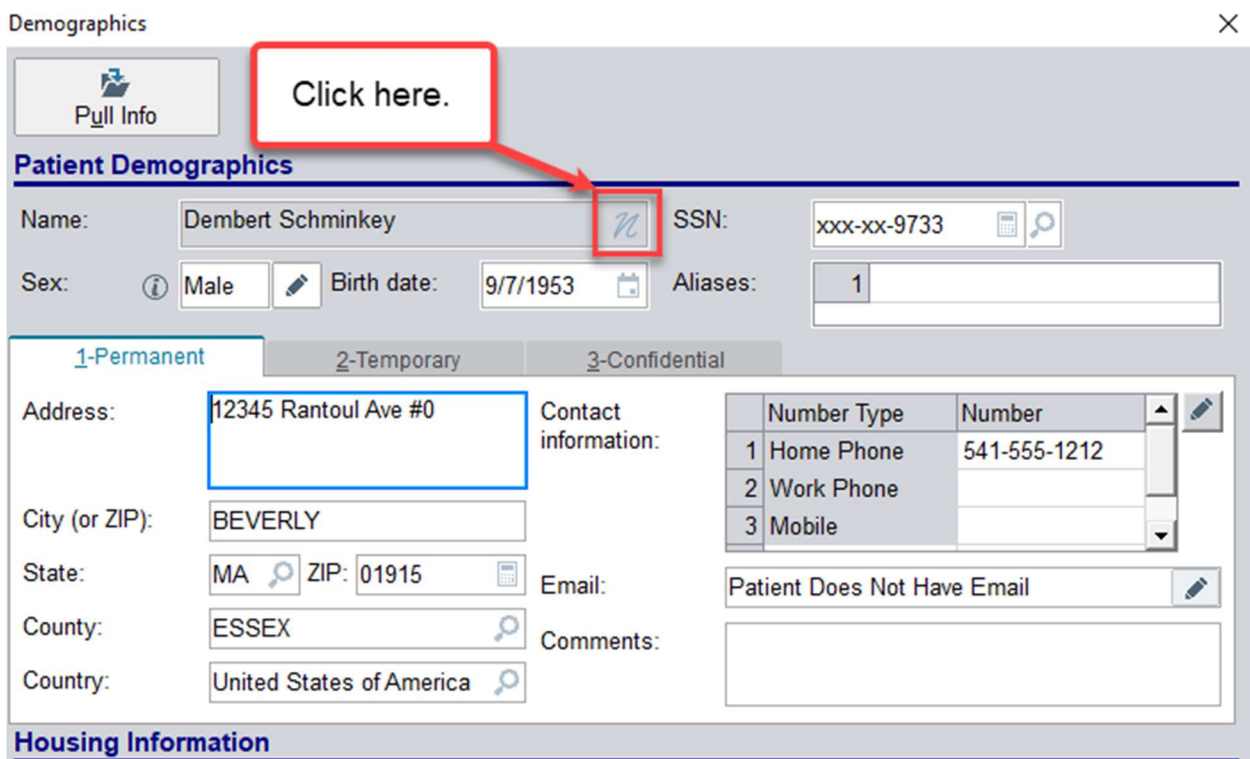
January 2023

Would you like to document a patient's preferred name? There is a place just for that.

1. If you are looking to document a patient's preferred name, on the interactive facesheet in either Home Health Intake or Hospice Intake, you first need to click on the Demographics hyperlink.



2. Next, click the cursive N next to the patient's name.



3. Enter the preferred name, and the preferred type will fill in automatically.

Name Edit

Dembert Schminkey

Title:

First name: Dembert

Middle name:

Last name: Schminkey

Suffix:

This name often appears throughout the patient's chart to clinical, access, and billing staff so they can use it to address the patient. It can also appear to patients and others on external communications, documents, and online health records.

Preferred name: Bertie Preferred type: First Name, F

Accept Cancel

4. After you click Accept, the updated name will show the preferred name in quotation marks. In other parts of Epic, the patient's name will appear as just the preferred name and last name.

Schminkey, Bertie

Intake for Home Health

Dembert Schminkey  
"Bertie"

Gender: Male, 69 y.o., 09/07/1953  
Phone: 541-555-1212  
MRN: 207105  
Code: Assume Full (no ACP docs)

COVID-19 Vaccine: Unknown  
COVID-19: Travel Screened  
8/29/2022

ALLERGIES

Schminkey, Dembert...

DEMOGRAPHICS

Schminkey, Dembert "Bertie"

Male | 9/7/1953 (69 yrs) | xxx-xx-9733 | MRN: 207105

Demographics 12345 Rantoul Ave #0  
Beverly, MA 01915

If the quotation marks are manually added to the name field instead of using this workflow, the punctuation will break real-time eligibility, CAHPS extracts, and some other workflows.

**NOTE:** Since updating the patient's name unlocks the OASIS and flags it to be resubmitted to CMS, the patient name should not be changed unless you know that you are changing the name to exactly what Medicare has on file.