Administering the MayoACCESS Application

As a MayoACCESS administrator, you can perform the following tasks:

- Manage physician records
- Manage patient records
- Administer MayoACCESS users
- Customize the MayoACCESS application

The following topics provide information about each of these tasks.

Managing Physician Records

As a MayoACCESS administrator, you can perform the following tasks:

- Create physician records
- Change physician information
- Delete or inactivate physician records
- Merge and unmerge physician records

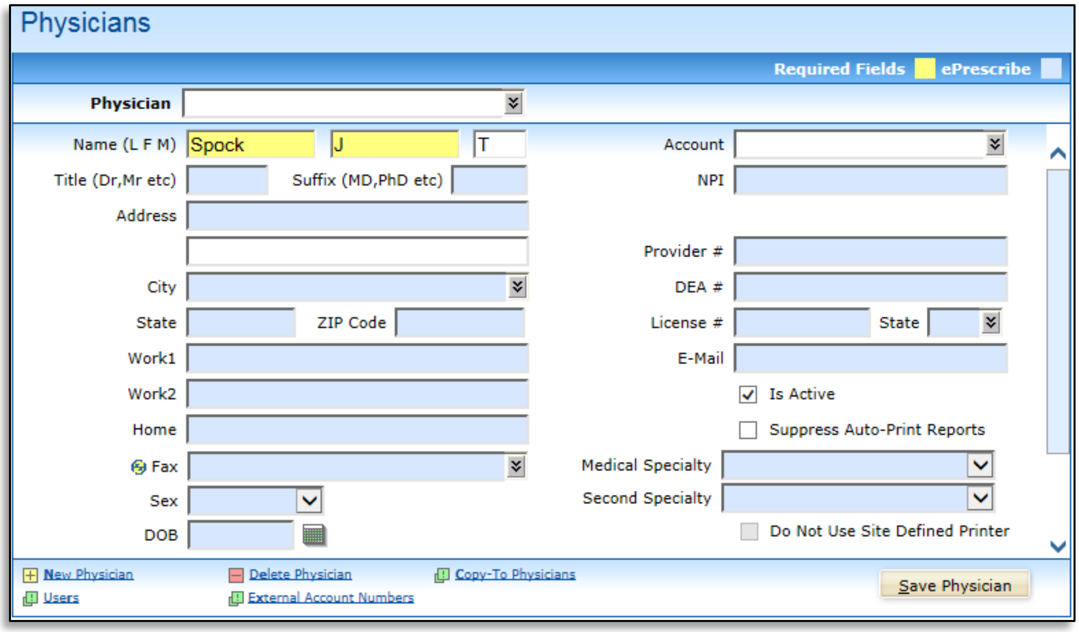
The following topics provide information about each of these tasks.

Creating a Physician Record

To create a physician record, follow these steps:

1. On the **Master Files** menu, click **Physicians**.

2. On the Physicians page, specify the information for the physician.



3. If applicable, select a specialty from the **Medical Specialty** and **Second Specialty** drop-down lists.
4. Click **Save Physician** to create the physician record.

Changing Physician Information

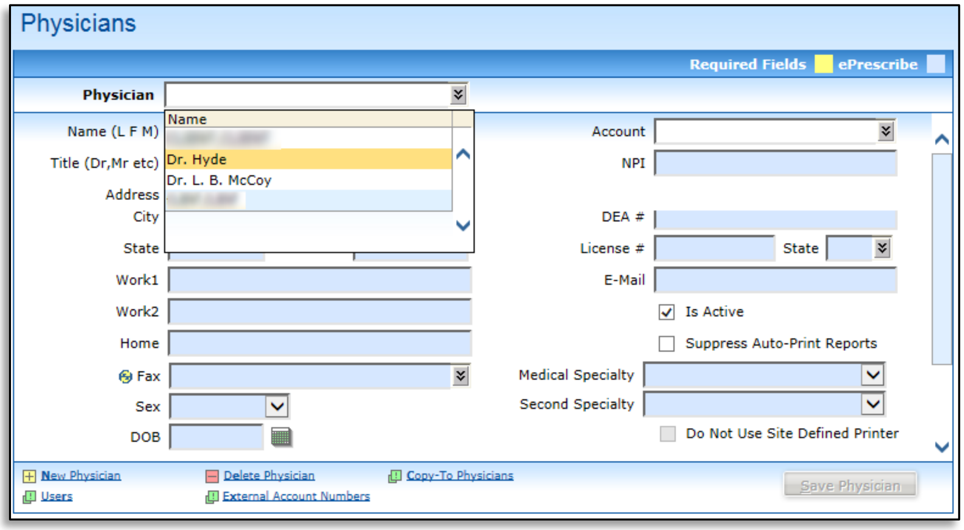
To change the information for a physician, follow these steps:

Note: You must belong to the Client Supervisor security group to perform this task.

1. On the **Master Files** menu, click **Physicians**.

2. On the Physicians page, select a physician name from the **Physician** drop-down list.

3. Add or change information about the physician, and then click **Save Physician**.



Deleting a Physician Record

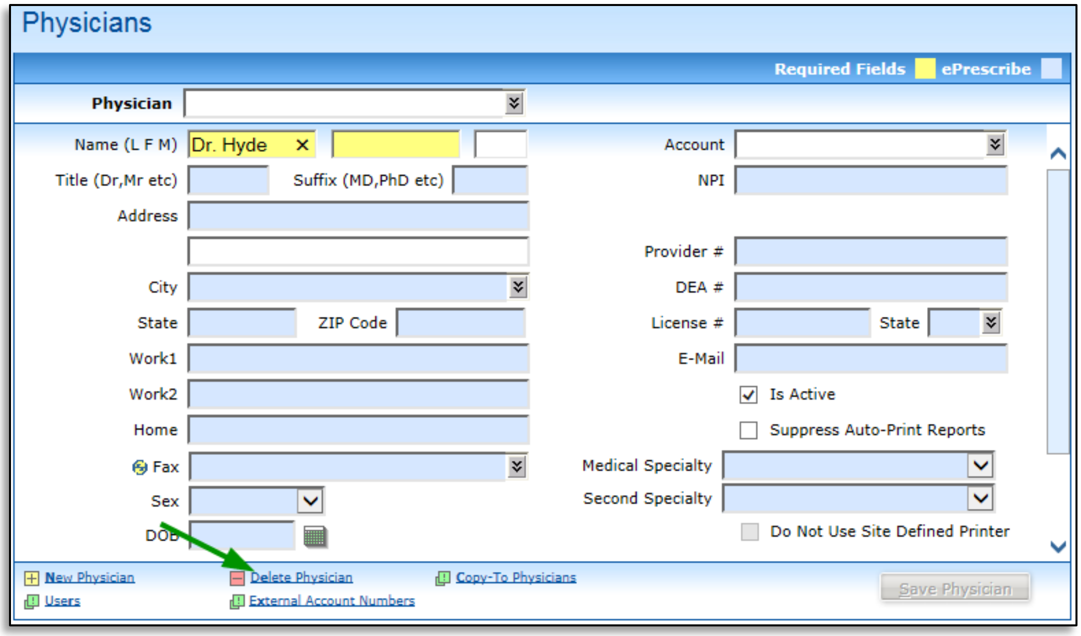
To delete a physician record, follow these steps:

Note: You must belong to the Client Supervisor security group to perform this task.

1. On the **Master Files** menu, click **Physicians**.

2. On the Physicians page, select a physician name from the **Physician** drop-down list.

3. Review the information to confirm that you selected the physician record that you want to delete, and then click **Delete Physician**.



Note: Physicians that are associated with test orders cannot be deleted. Instead you must inactivate the physician record by clearing the **Is Active** check box.

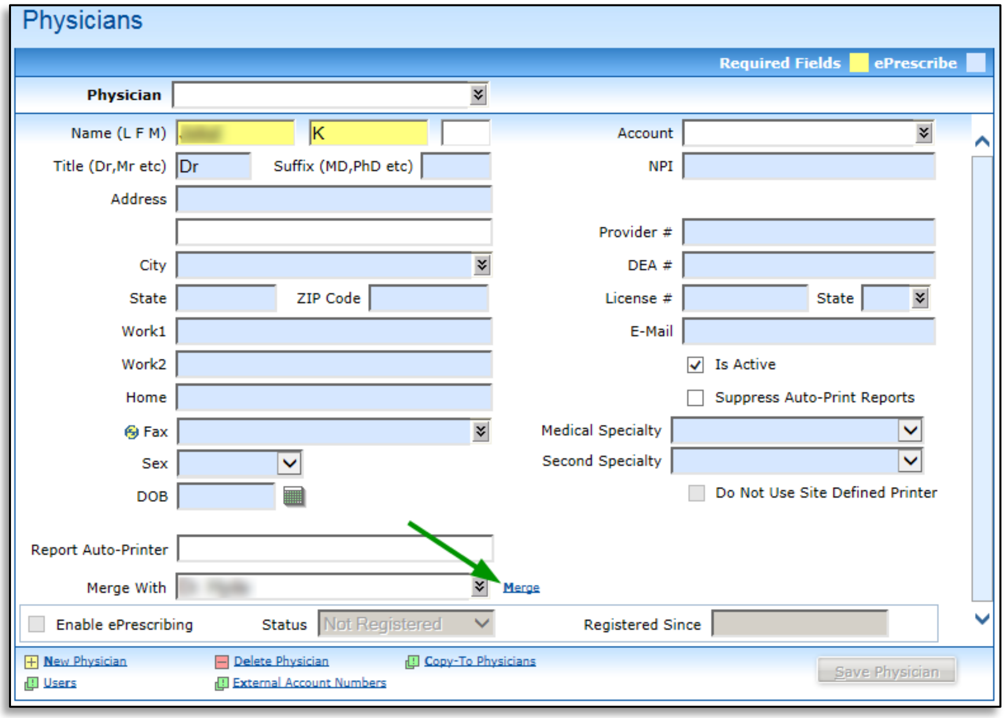
Merging Physician Records

To merge different physician records into a single record for the same physician, follow these steps:

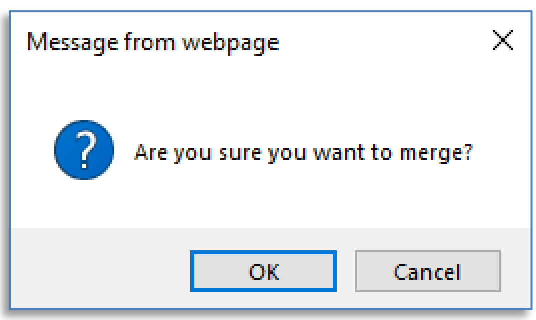
1. On the **Master Files** menu, click **Physicians**.

2. On the Physicians page, select a physician name from the **Physician** drop-down list.
3. Select the correct record for the physician from the **Merge With** drop-down list.

4. Click the **Merge** link.



5. When prompted, click **OK** to confirm that you want to merge these records.



Note: After the records are merged, the **Merge** link changes to **Unmerge**. If you need to reverse the merge, click the **Unmerge** link.

Managing Patient Records

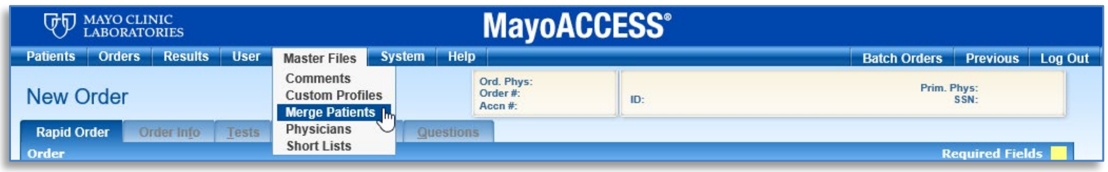
As a MayoACCESS administrator, you can merge patient records for the same patient. The original records are retained, so if necessary, you can later unmerge patient records that have been merged.

Merging Patient Records

To merge patient records into a single record for the same patient, follow these steps:

Note: You must belong to the Client Supervisor security group to perform this task.

1. On the **Master Files** menu, click **Merge Patients**.

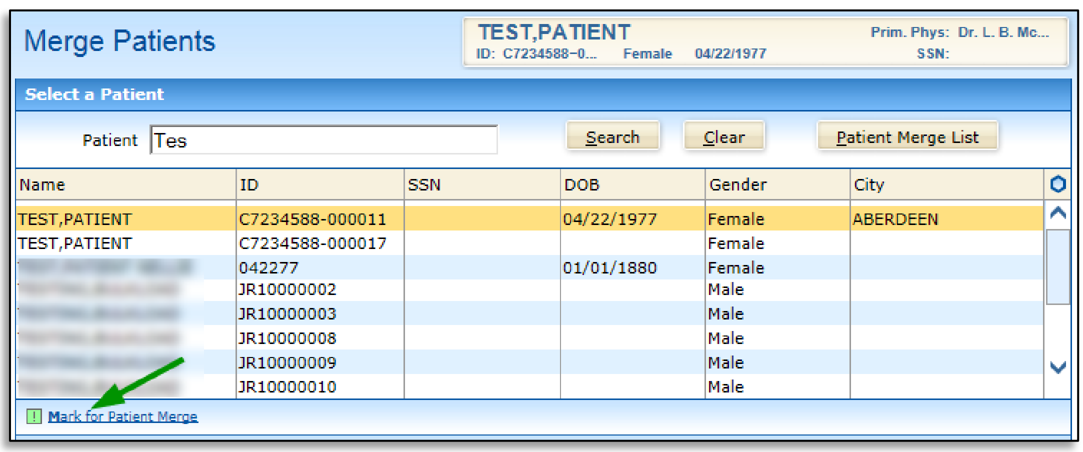


2. On the Merge Patients page, in the **Patient** text box, enter all or part of the patient's name, and then click **Search**.

   The patient records that match the characters that you entered are shown.

3. Select a patient record from the list, and then click the **Mark for Patient Merge** link.

   Tip: If the **Mark for Patient Merge** link is not shown on the Merge Patients page, it is available on the SmartMenu.



   The following message is shown:

   `You are in Patient Merge Mode. Select the patient who will be merged with` *`Last Name,First Name`* `and click the Mark for Patient Merge link or` <u>`click here to exit`</u>`.`

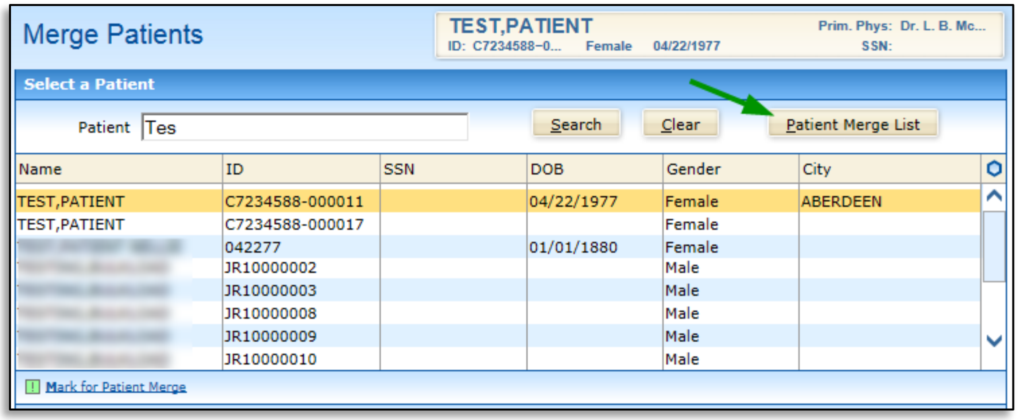
4. Select the duplicate patient record on the list, and then click the **Mark for Patient Merge** link again.

   A message is shown, indicating that the patient records have been marked for the merge operation.

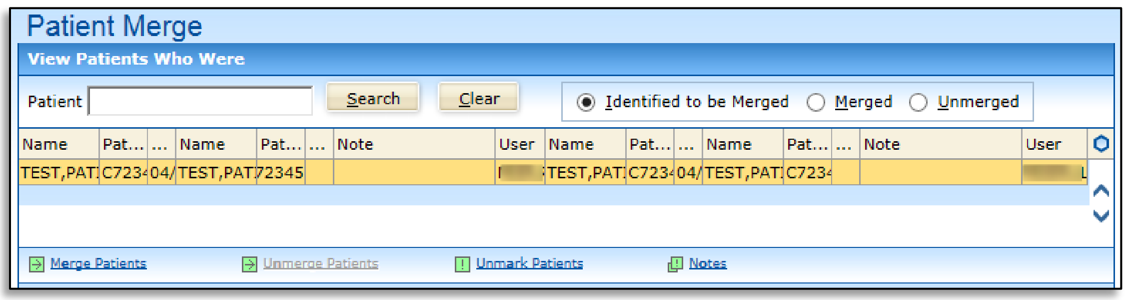
5. Click **OK** to continue.

   Note: You can mark multiple patient records to merge by repeating steps 3 - 5.

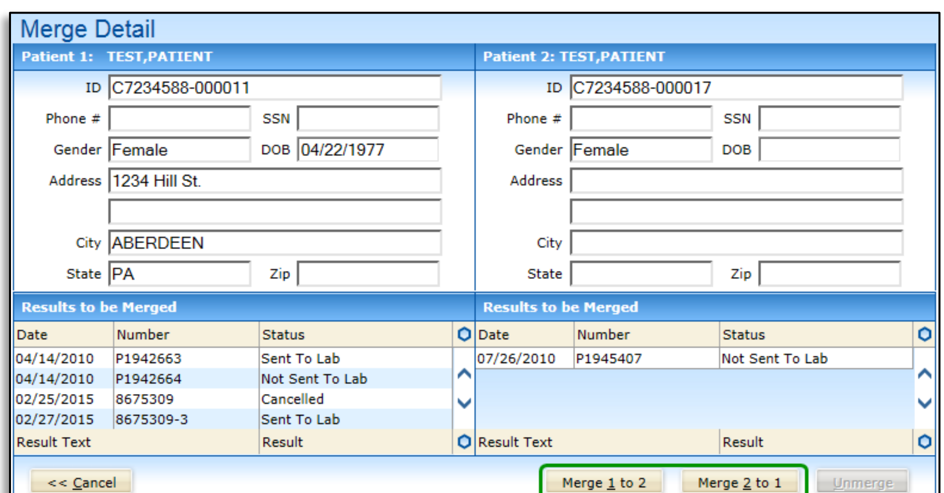
6. Click **Patient Merge List** to display a list of patient records that have been marked for the merge operation.



7. Select the set of records to merge on the list, and then click the **Merge Patients** link to start the merge operation.



8. On the Merge Detail page, compare the patient records to determine which record to keep, and then click either **Merge 1 to 2** or **Merge 2 to 1**.



For example, if the patient information is complete and accurate in the first patient record, but patient information is missing in the second record, click **Merge 2 to 1**. The merge operation copies the orders and results from the second record to the first record. The second record is not deleted, but is no longer shown in the view for that patient.

9. When prompted, click **OK** to confirm the merge.
10. When the merge is complete, click **OK**.

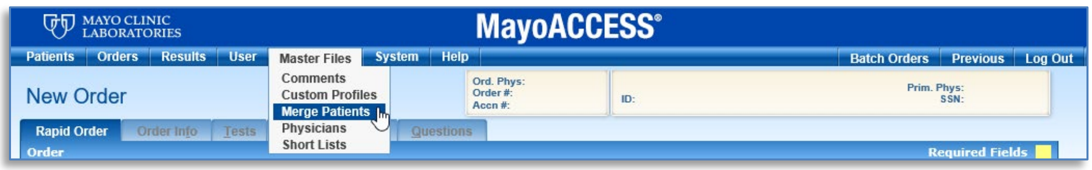
Unmerging Patient Records

The merge operation merges the orders and results from one record into another, but the second record is not deleted.

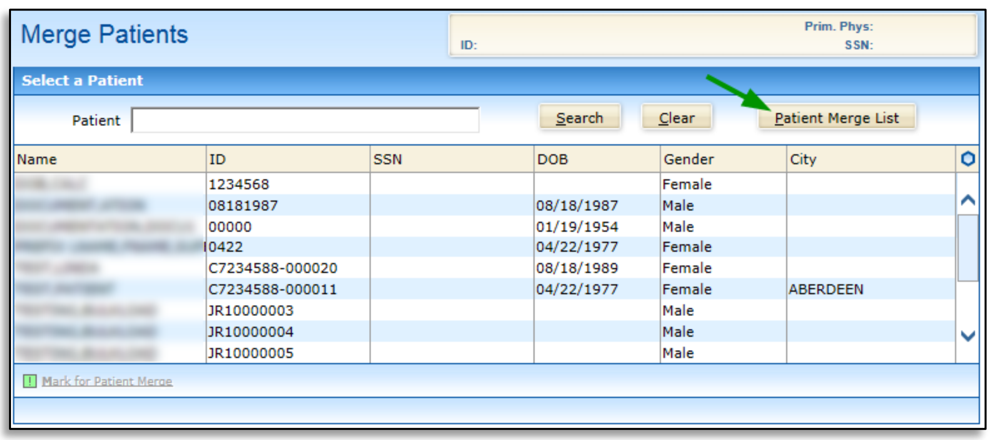
Note: You must belong to the Client Supervisor security group to perform this task.

To unmerge patient records that have been merged, follow these steps:

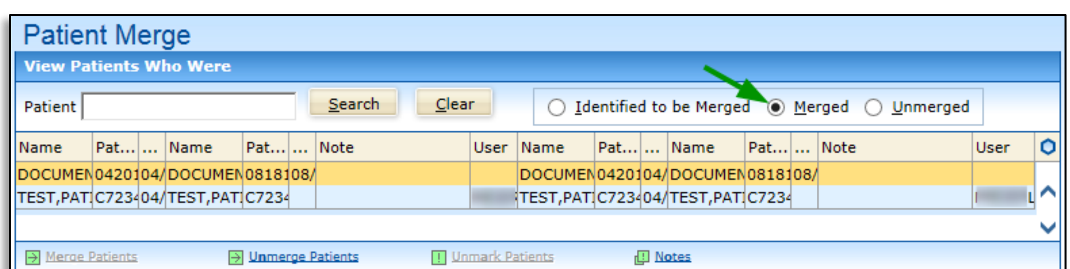
1. On the **Master Files** menu, click **Merge Patients**.



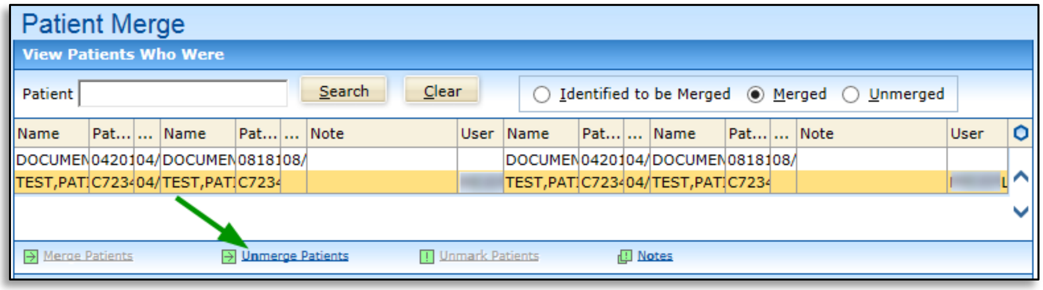
2. On the Merge Patients page, click **Patient Merge List.**



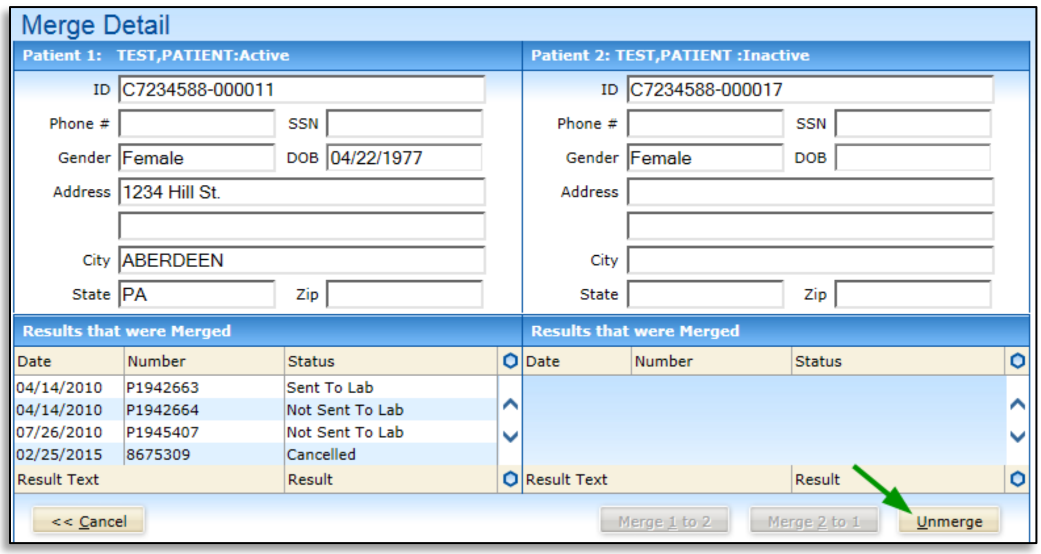
3. Click **Merged** to display patient records that have been merged.



4. Select the set of patient records to be unmerged, and then click the **Unmerge Patients** link.



5. On the Merge Detail page, verify that you selected the records that you want to unmerge, and then click **Unmerge**.



6. When prompted, click **OK** to confirm that you want to unmerge these records.
7. When the unmerge operation is complete, click **OK**.

Administering MayoACCESS Users

As a MayoACCESS administrator, you can perform the following tasks:

- Add MayoACCESS users
- Change user information
- Inactivate a user

Adding a User

To add a MayoACCESS application user, you must define the user and assign the user to a location within a site. All steps for adding a user must be completed before the user can sign in to MayoACCESS.

You need the following information for each user:

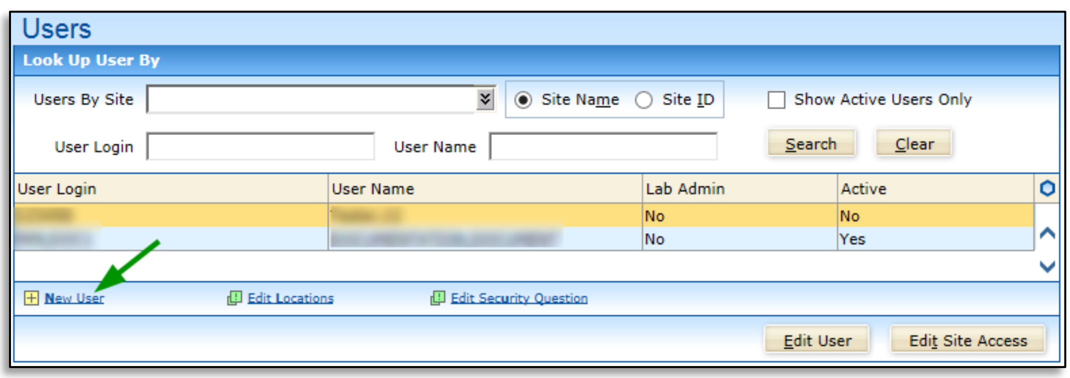
- Last Name, First Name, Middle Initial (optional).
- Email address.
- Level of access. See Step 12 for security group definitions.
- The account number to assign to the user if the client site has multiple accounts.
- The 3-letter abbreviation that Mayo Clinic Laboratories provided to you as a prefix to the User ID.

To add a user, follow these steps:

Note: You must belong to the Client Supervisor security group to perform this task.

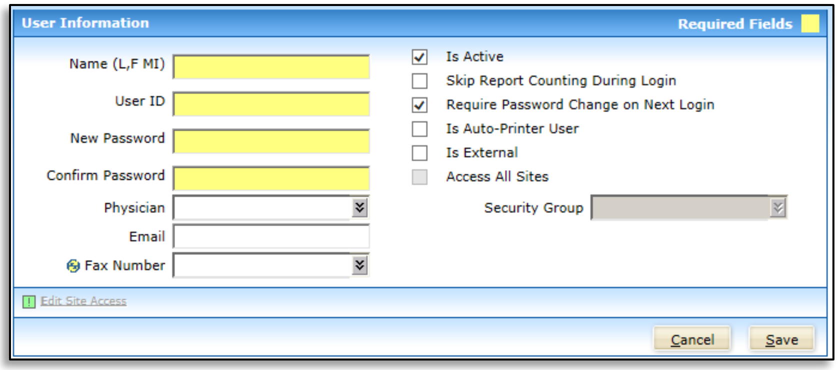
1. On the **System** menu, click **Users.**

2. On the Users page, click the **New User** link.



3. In the User Information dialog box, in the **Name** text box, enter the user's name as follows:

   Last name, first name, middle initial (if available)



4. Enter a unique identifier for the user.

   Use the 3-letter abbreviation that Mayo Clinic Laboratories provided to you as a prefix for the User ID followed by the unique identifier for the user. For example, if the 3-letter abbreviation is ABC and the user is John Smith, you can enter ABCSMITHJ.

   Note: The 3-letter abbreviation is used only for setup. The user will not use the abbreviation to sign in to MayoACCESS.

5. Enter a new password in the **New Password** text box.

   Note: Your password must be a minimum of 8 characters and must contain uppercase, lowercase, numbers, and special characters (except '^').

6. Enter the same new password in the **Confirm Password** text box.

   Note: The user does not need to know the user ID or password. The user ID and password are used only for setup.

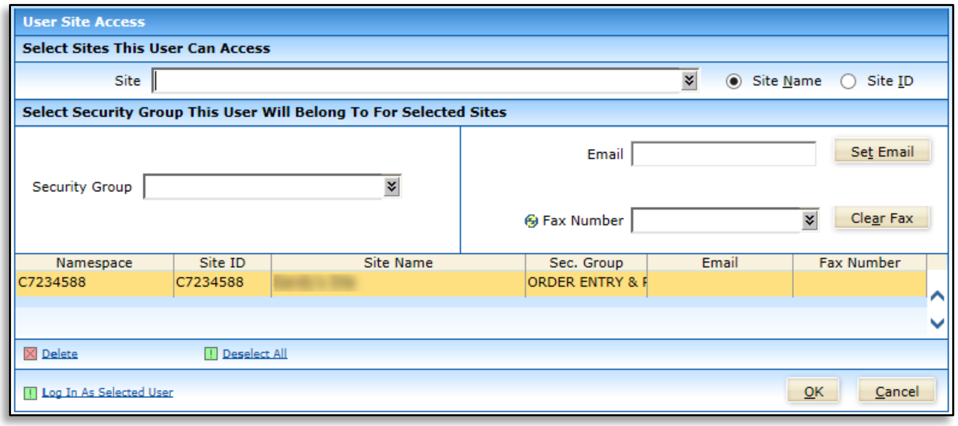
7. Enter the user's email address. A business email address is recommended.

   Note: The user will use the email address to sign in to MayoACCESS.

8. Verify that the **Is Active** check box is selected.

9. Click **Save** to save the new user information.

10. In the User Site Access dialog box, from the **Site** drop-down list, select the site that you want this user to access.



You can select more than one site for each user.

11. From the **Security Group** drop-down list, select the access that you want this user to have.

You can choose from the following security levels:

Security Group	**Available tasks**
Test Catalog	• Access the Directory of Services The user cannot access client information or patient data. This is the most basic role.
Test Catalog & Results	• Access the Directory of Services • Access test results for assigned site This user only needs access to test results.
Order Entry	• Access the Directory of Services • Order tests The user cannot access test results.
Order Entry & Results	• Access the Directory of Services • Order tests • Access test results This is the most commonly assigned user security role.
Pathology Lab Reports	• Access the Directory of Services

Security Group	Available tasks
	• Access test results, specifically supplemental reports or data, for assigned site This role is commonly used by physicians and pathologists for placing orders.
Client Supervisor	• Access the Directory of Services • Order tests • Access test results • Access test utilization reports • Set up new users in the application The user who is assigned to this security role can act as an administrator for the client site.

Note: If you want to selected multiple sites and want to select a different security level for each site, select the site, and then select the security level for that site.

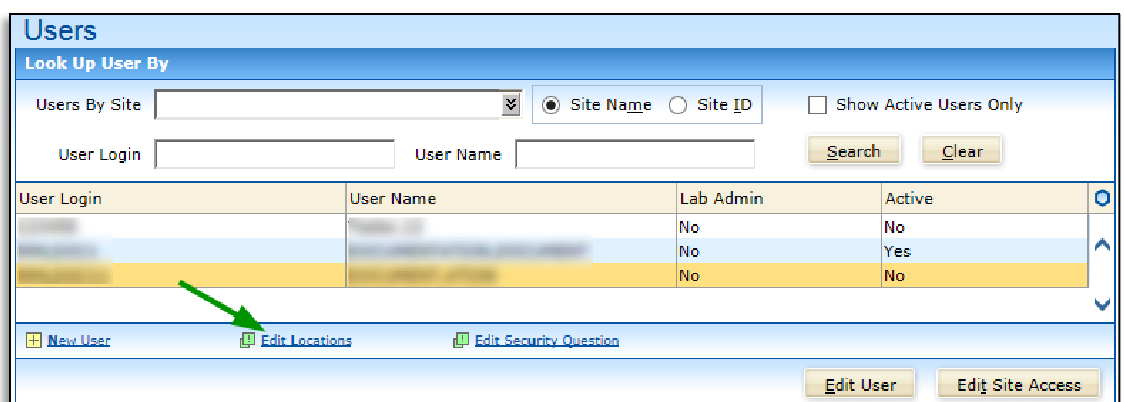
Important: Do not enter the email address on the User Site Access page. Duplicate email address entries result in the user receiving duplicate notifications.

12. Click **OK** to save these settings.

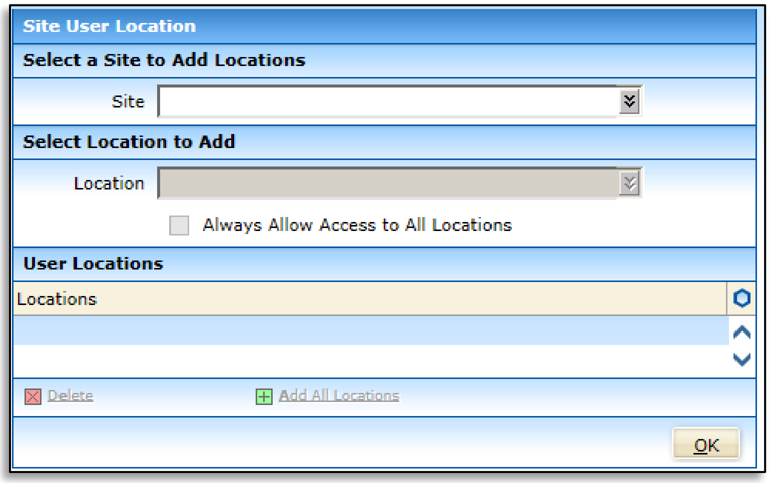
    A message is shown to indicate that site access was added for the user.

13. Click **OK** to continue.

14. To assign the user access to a location within each site, click the **Edit Locations** link.



15. In the Site User Location dialog box, from the **Site** drop-down list, select the site for this user.



16. Use one of the following methods to select the location that you want to enable the user to access:
    - Select the location from the **Location** drop-down list.
    - Click the **Always Allow Access to All Locations** check box.

      This gives the user access to all the locations for this site.
    - Click the **Add All Locations** link. All the locations for this site are shown.

    Note: You can give the user access to more than one location.
17. Click **OK**.

A registered user receives an email with an invitation to sign in to MayoACCESS. A non-registered user receives an email with an invitation to register on mayocliniclabs.com.

Changing User Information

To change the information for a MayoACCESS application user, follow these steps:

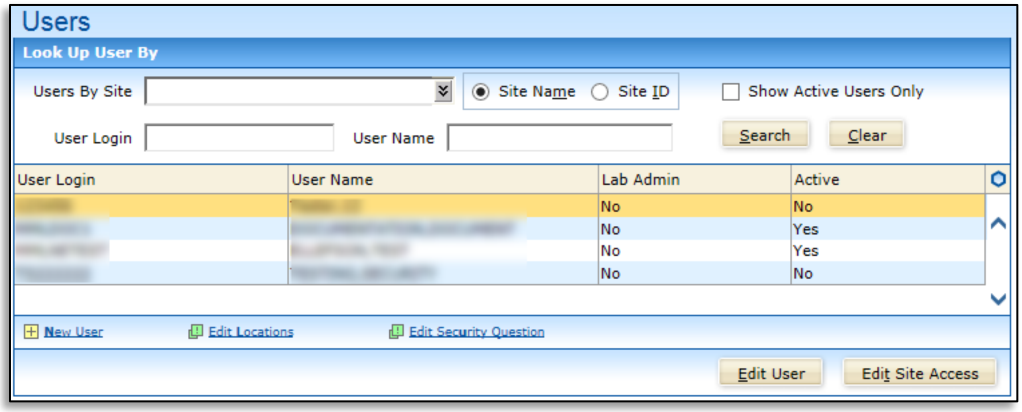
Note: You must belong to the Client Supervisor security group to perform this task.

1. On the **System** menu, click **Users.**

2. On the Users page, select a site from the **Users By Site** drop-down list to display the user records for that site.

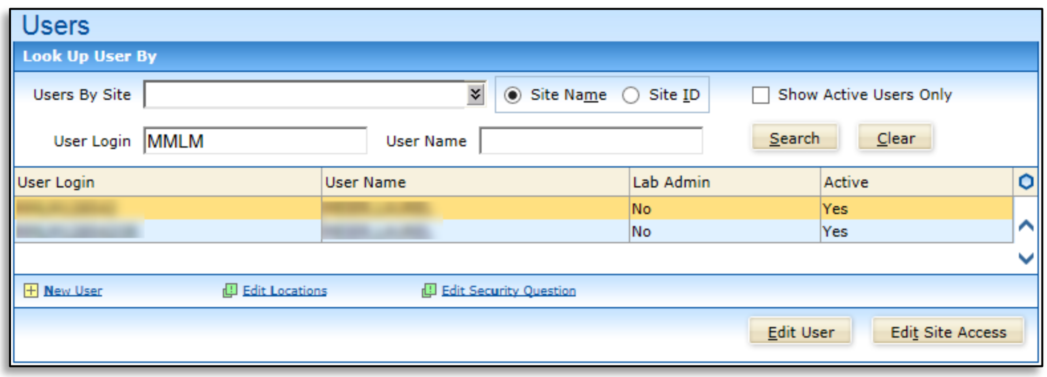
   Tips:

- Leave the **Users By Site** text box blank to search all files.
- Select **Site Name** or **Site ID** to display the list of sites by name or by site ID.

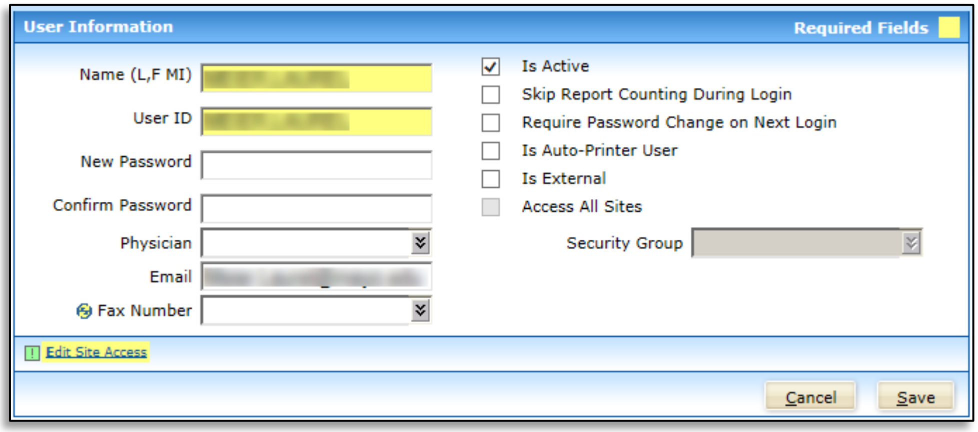


3. Enter some or all the characters for the user in either the **User Login** or **User Name** text box, and then click **Search**.

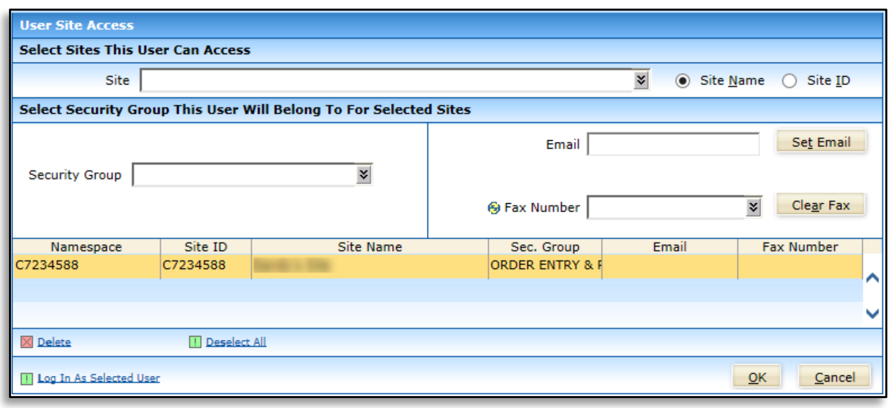
   The list of users that match the characters you entered is shown.



4. Select the user record that you want to change.
5. To change the user name, the user ID, or the security access for the user, click **Edit User**.
6. To change the name or User ID for the user, enter the new information in the **Name** or **User ID** text box of the User Information dialog box.



7. To change the site that the user can access or to change the security access for the user, click the **Edit Site Access** link in the User Information dialog box.
8. To change the site that the user can access, select the desired site from the **Site** drop-down list in the User Site Access dialog box.



9. To change the security access for the user, select the desired security level from the **Security Group** drop-down list.
10. Click **OK** to save the changes.
11. Click **Save** to apply the changes and to close the user record.

Inactivating a User

User records cannot be deleted, so you must inactivate a user if you want to prevent that user from accessing the MayoACCESS application.

Note: You must belong to the Client Supervisor security group to perform this task.

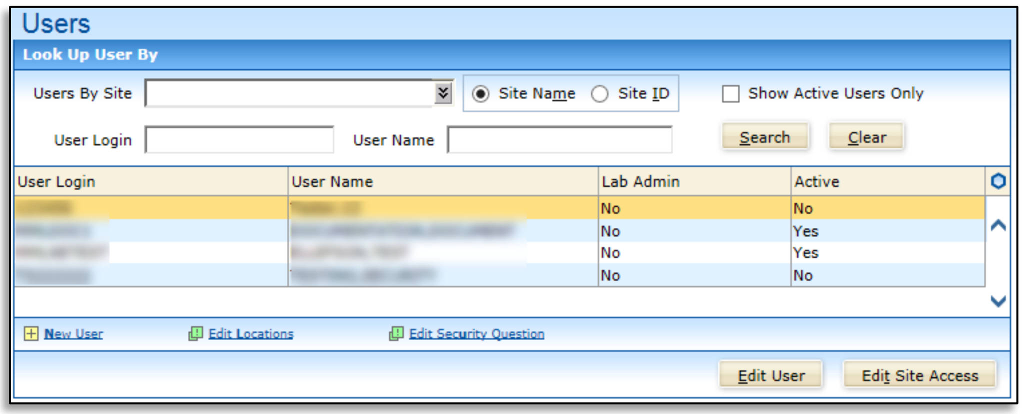
To inactivate a user, follow these steps:

1. On the **System** menu, click **Users.**

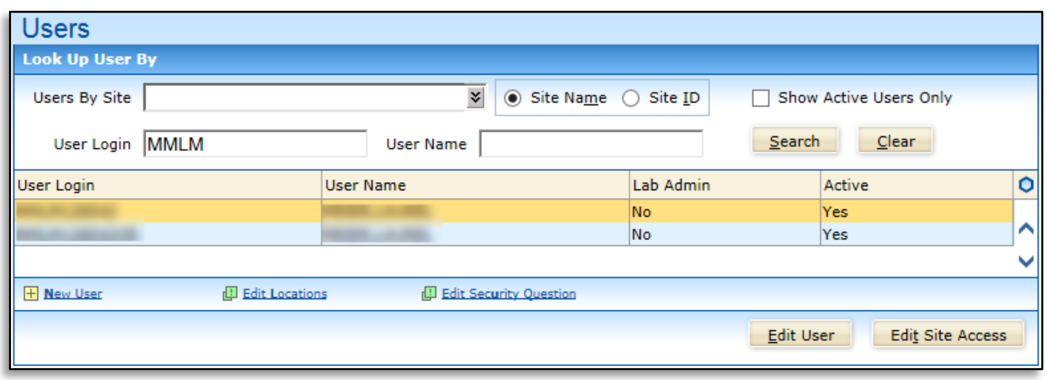
2. To display the user records for that site, select a site from the **Users By Site** drop-down list on the Users page.

   Tips:

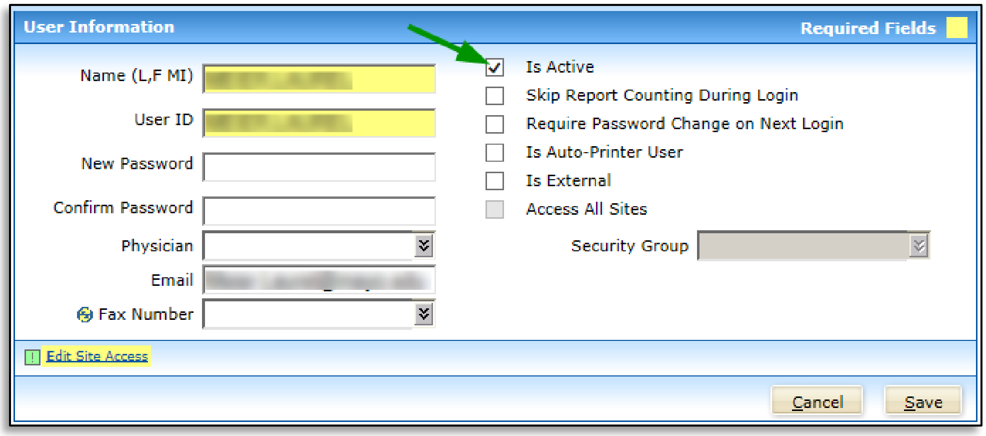
   - Leave the **Users By Site** field blank to search all files.
   - **Select Site Name** or **Site ID** to display the list of sites by name or by site ID.



3. Enter some or all the characters for the user in either the **User Login** or **User Name** text box, and then click **Search**.
4. From the list of users that is shown, select the record for the user that you want to inactivate.



5. Click **Edit User**.



6. In the User Information dialog box, clear the **Is Active** check box, and then click **Save**.

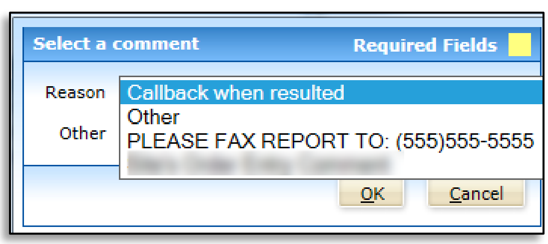
Customizing the MayoACCESS Application

As a MayoACCESS administrator, you can customize the MayoACCESS application for your users by performing the following tasks:

- Creating comments
- Creating a custom profile
- Creating a list of frequently ordered tests

Creating Comments

You can create comments that users can select when they perform certain actions within the MayoACCESS application. The following figure shows example comments that are displayed when you click the **Report Notes** link on the New Order page:

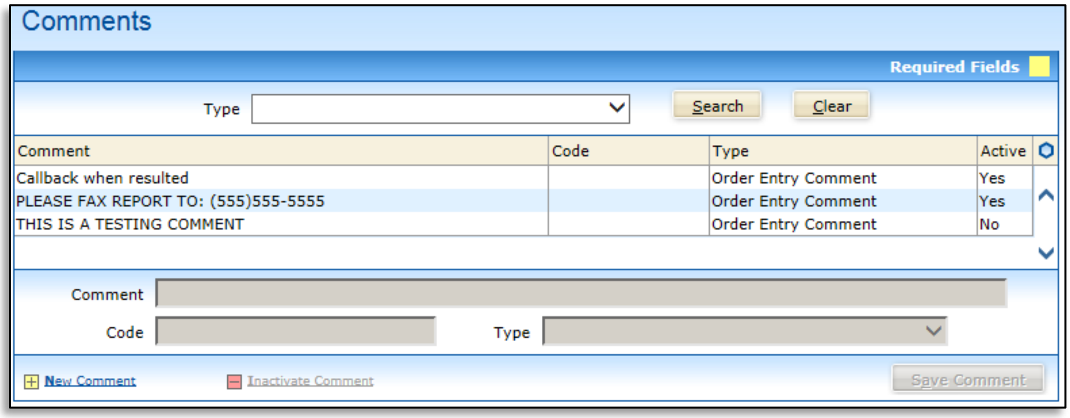


Note: You must belong to the Client Supervisor security group to perform this task.

To create a comment, follow these steps:

1. On the **Master Files** menu, click **Comments**.

2. On the Comments page, click the **New Comment** link.



3. In the Comment text box, enter the comment that you want to add.
4. From the **Type** drop-down list, select that activity for which you want the comment to be displayed.
5. Click **Save Comment**.

To change a comment, select the comment, change the comment, and then click **Save Comment**.

To inactivate the comment, select the comment, and then click the **Inactivate Comment** link**.**

Creating a Custom Profile

You can create a single code to group multiple tests. This single code is called a custom profile. You can use a custom profile to save time when you frequently order the same tests together. You can create, change, or delete a custom profile.

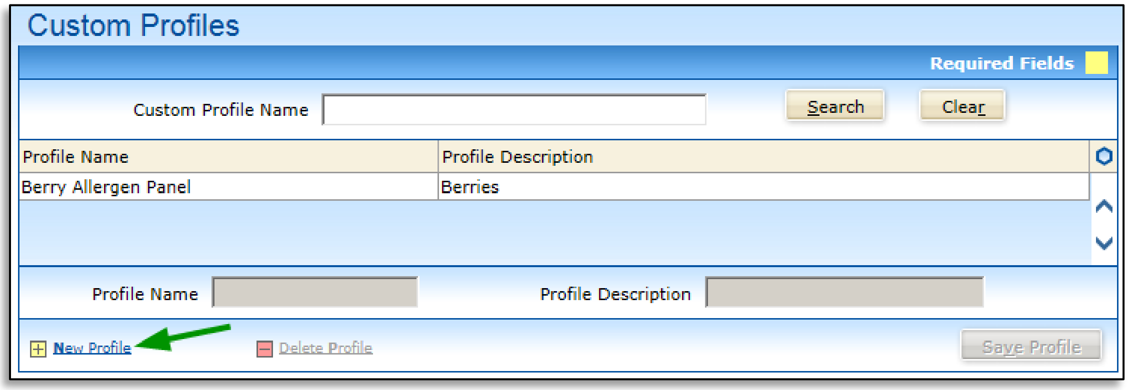
Notes:

- Custom profiles cannot be used for interfaced orders.
- You must belong to the Client Supervisor security group to perform this task.

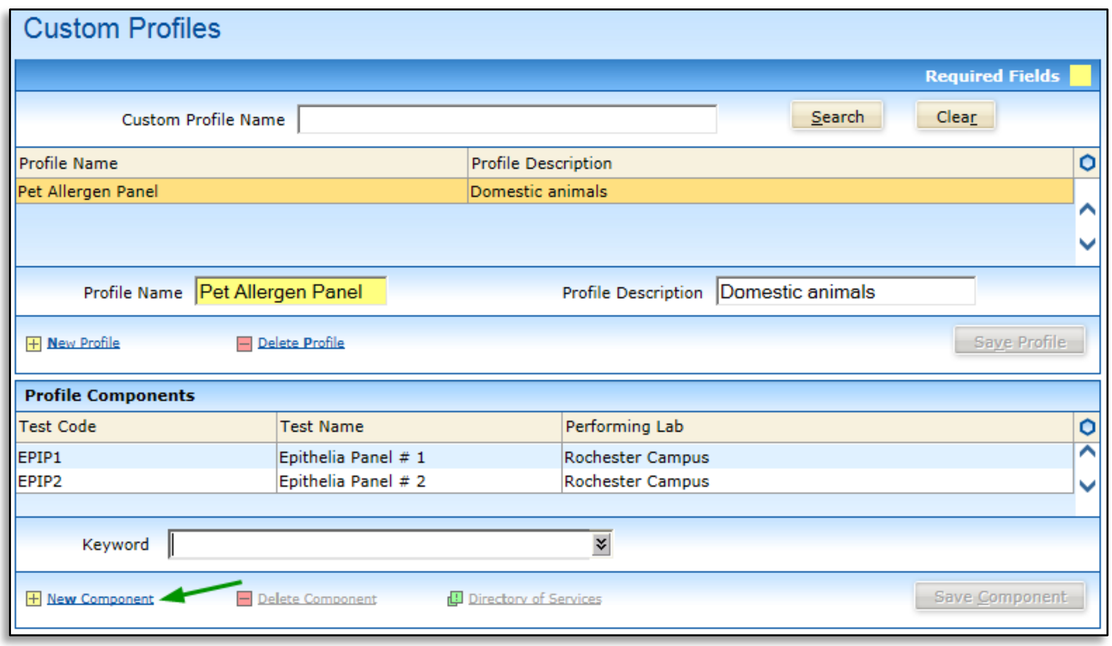
To create a custom profile, follow these steps:

1. On the **Master Files** menu, click **Custom Profiles**.

2. On the Custom Profiles page, click the **New Profile** link.



3. In the **Profile Name** text box, enter a name for the custom profile.
4. **Optional:** In the **Profile Description** text box, enter a description for the custom profile.
5. Click **Save Profile**.
6. Click the **New Component** link.



7. Enter the test name, test code, or test mnemonic in the **Keyword** text box, or select the test from the drop-down list.
8. Click **Save Component**.
9. Repeat steps 7 - 8 to add tests to the custom profile**.**

Note: If you do not click the **New Component** link before you add a test, the selected test replaces the current test.

To delete a test from a custom profile, highlight the test and click the **Delete Component** link.

To delete a custom profile, highlight the profile and click the **Delete Profile** link.

Creating a Short List of Frequently Ordered Tests

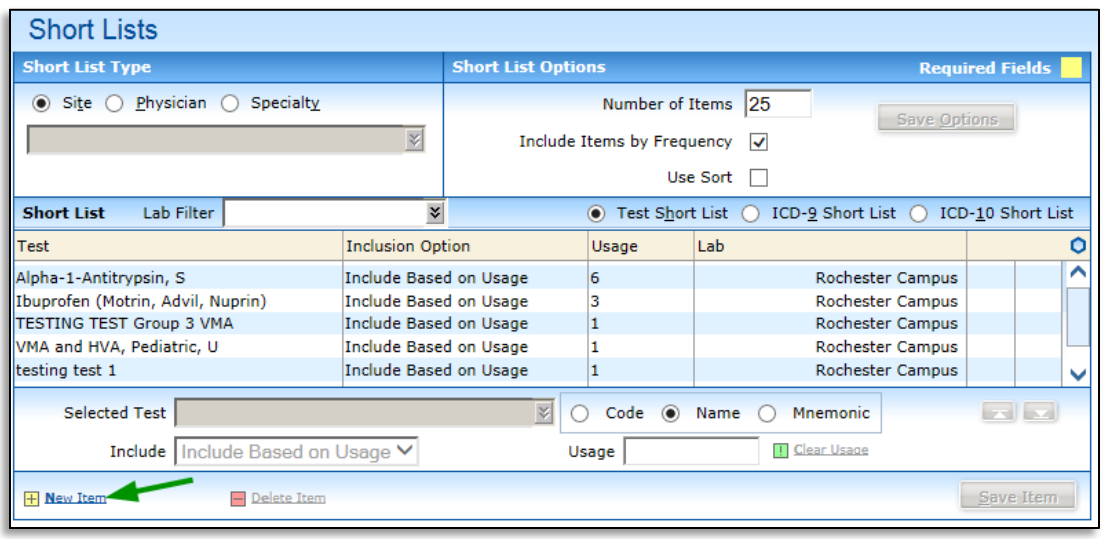
You can create a list of frequently ordered tests. This list is called a short list. The short list is shown on the New Order page and enables you to quickly select a test, rather than look it up. Short Lists can be created for and organized by site, physician, or specialty.

Note: You must belong to the Client Supervisor security group to perform this task.

To create a short list, follow these steps:

1. On the **Master Files** menu, click **Short Lists**.

2. To add a test, click the **New Item** link on the Short Lists page**.**



3. Enter the test name, test code, or test mnemonic in the **Selected Test** text box, or select the test from the drop-down list.

4. From the **Include** drop-down list, select when the test is displayed in the short list.

   The available options are as follows:

Option	**Description**
Include Based on Usage	Tests are shown based on how frequently they are ordered.
Always Include	The selected test is always shown in the short list.
Never Include	The selected test is never shown in the short list.

5. Click **Save Item**.

To delete a test from the short list, select the test that you want to delete and click the **Delete Item** link**.**