Administering MayoACCESS

As a MayoACCESS administrator, you can:

- Manage physician records
- Manage patient records
- Control permissions and change information for MayoACCESS users
- Customize MayoACCESS

Managing physician records

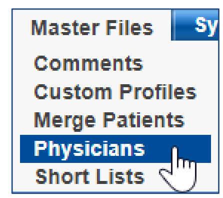
MayoACCESS administrators can manage physician records in the following ways:

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

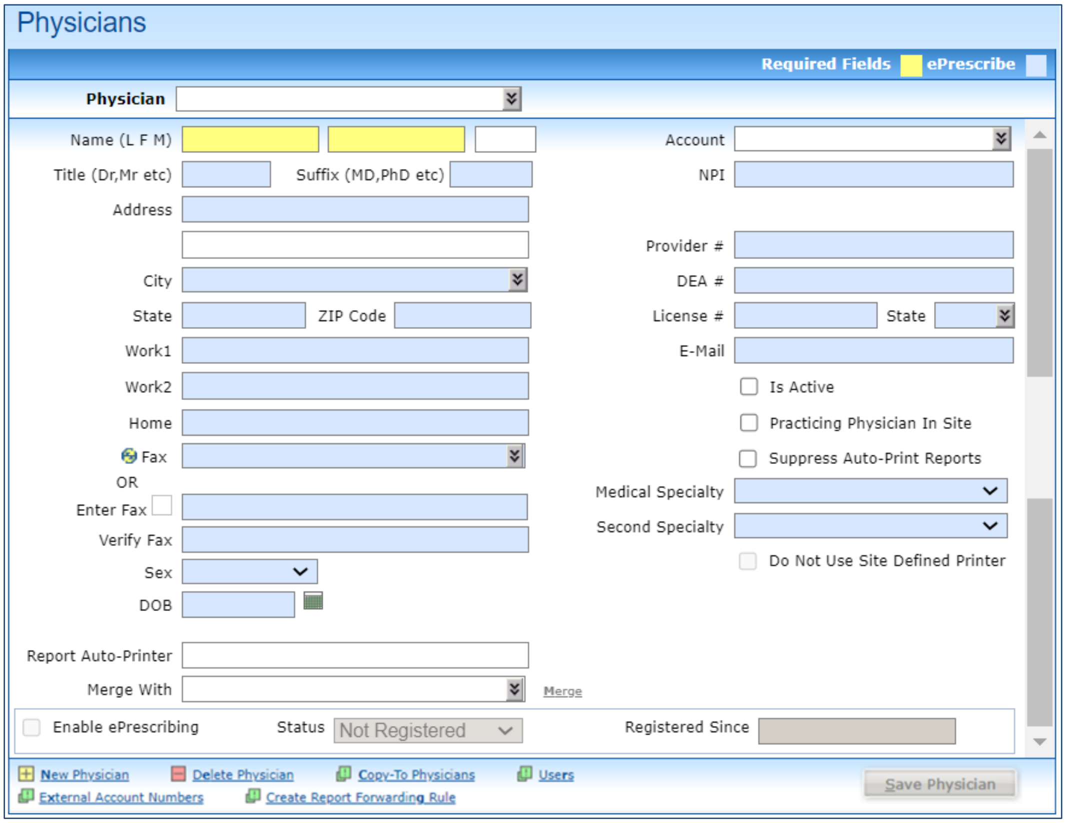
Creating a physician record

To create a physician record:

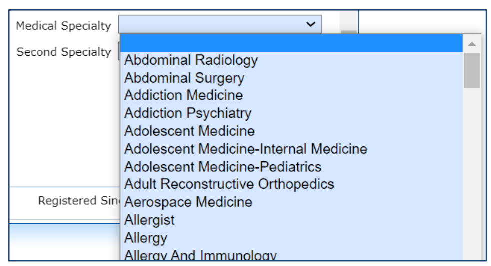
1. From the **Master Files** menu, select **Physicians** (right).

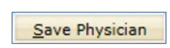


The **Physicians** page appears.



2. Complete the fields with the physician's information.
3. If applicable, select a specialty from the **Medical Specialty** and/or the **Second Specialty** drop-down menus (right).

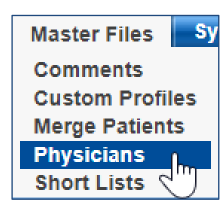


4. To create the physician record, at bottom right, click the **Save Physician** button. 

Changing physician information

To change information for a physician:

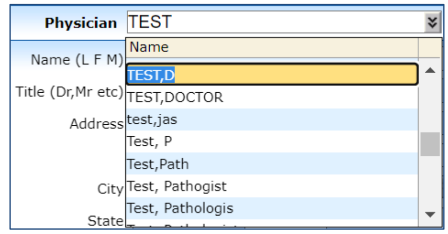
Note: You must belong to the Client Supervisor Security Group to perform this task.



1. From the **Master Files** menu, select **Physicians** (right).

The **Physicians** page appears.

2. At top left, from the **Physician** drop-down menu, select a physician name (right).



The physician's information autopopulates the fields on the page.

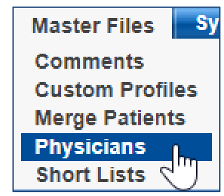
3. Add or change information about the physician.
4. At bottom right, click the **Save Physician** button.

Deleting a physician record

To delete a physician record:

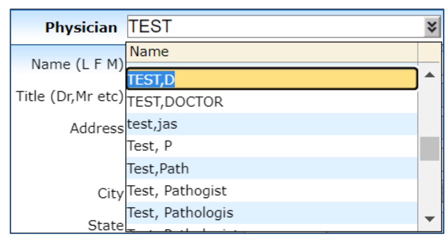
Note: You must belong to the Client Supervisor Security Group to perform this task.

1. From the **Master Files** menu, select **Physicians** (right).



The **Physicians** page appears.

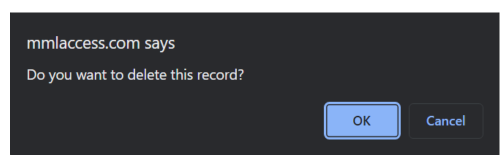
2. At top left, from the **Physician** drop-down menu, select a physician name (right).



The physician's information autopopulates the fields on the page.

3. Review the information to confirm you have selected the record you want to delete.
4. In the SmartLinks Bar, click the **Delete Physician** SmartLink.

A pop-up asks you to confirm that you want to delete the physician record (right).



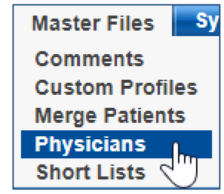
5. To confirm, click the **OK** button.

Note: Physicians who are associated with test orders cannot be deleted. Instead, you must inactivate the physician record by clearing the **Is Active** box on the lower right side of the **Physicians** page.

Merging physician records

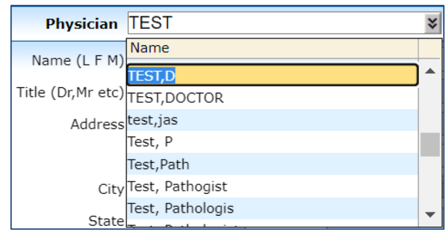
To merge different physician records into a single record for the same physician:

1. From the **Master Files** menu, select **Physicians**.

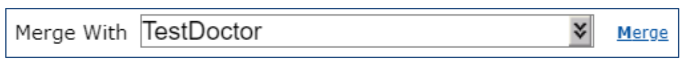
   The **Physicians** page appears.

2. At top left, from the **Physician** drop-down menu, select a physician name (right).

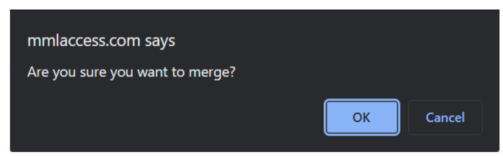
   The physician's information autopopulates the fields on the page.

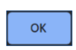
3. Scroll down on the page. At bottom right, from the **Merge With** drop-down menu, select the correct record for the physician (right).

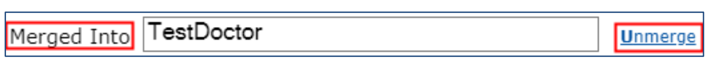
4. To the right of the **Merge With** drop-down menu, click the **Merge** link. 

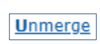
   A pop-up asks you to confirm that you want to merge the two physician records.

5. To confirm, click the **OK** button. 

   Note: Once the two records are merged, the **Merge With** drop-down menu becomes the **Merged Into** drop-down menu, and the **Merge** link becomes the **Unmerge** link.

   If you need to undo the merger, click the **Unmerge** link. 

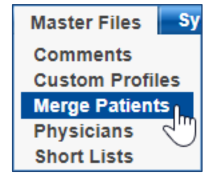
Managing patient records

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

Merging patient records

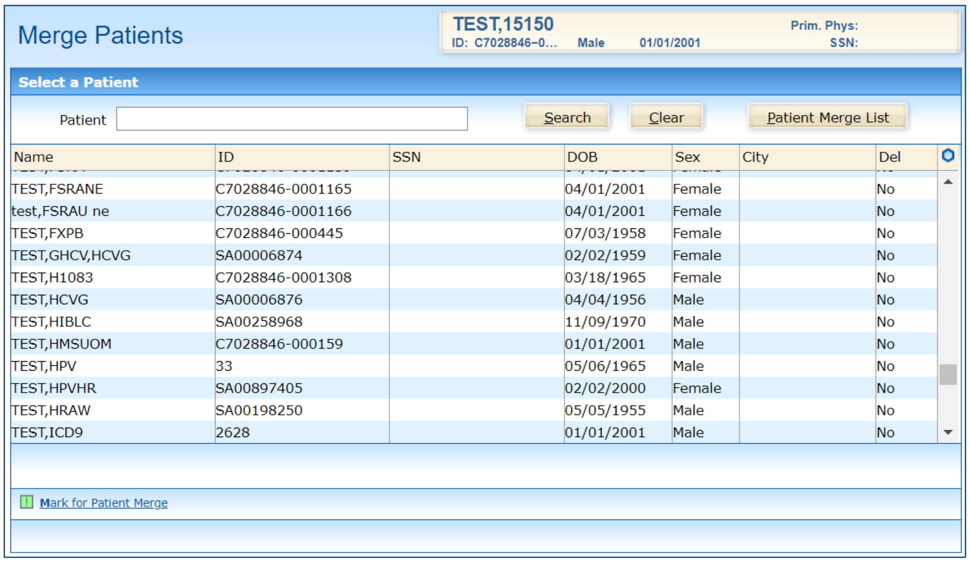
To merge two patient records into a single record for the same patient:

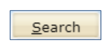
Note: You must belong to the Client Supervisor Security Group to perform this task.



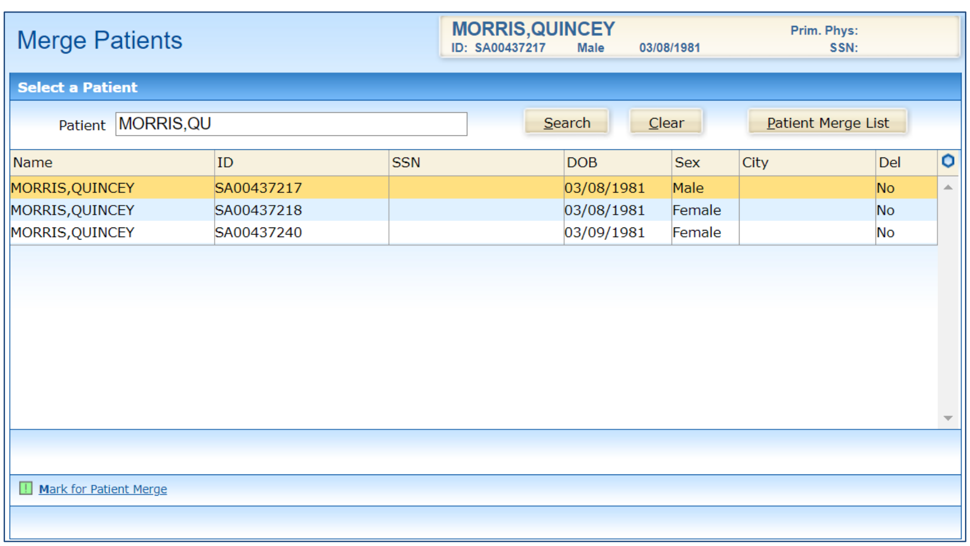
1. From the **Master Files** menu, select **Merge Patients** (right).

   The **Merge Patients** page appears.



2. In the **Patient** text field, enter all or part of the patient’s name.
3. To the right of the **Patient** text field, click the **Search** button. 

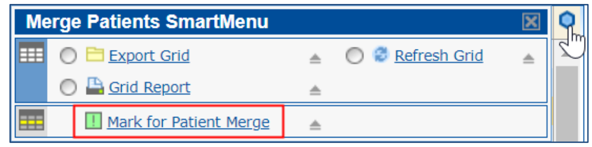
   The patient records matching the characters you entered are shown.



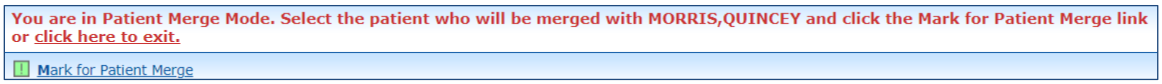
4. Select a patient record from the list.

5. In the SmartLinks Bar, click the **Mark for Patient Merge** SmartLink. 

   Tip: If the **Mark for Patient Merge** SmartLink does not appear in the SmartLinks Bar, it is available on the **Merge Patients SmartMenu** (right).

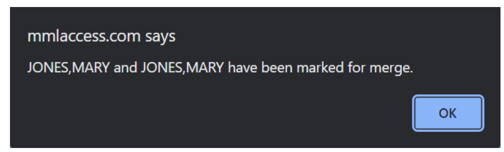


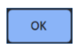
   A message appears above the SmartLinks Bar, informing you that you are in Patient Merge Mode and providing further instructions.



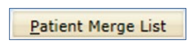
6. From the list of results, select the second patient record you want to merge with the first one.
7. Click the **Mark for Patient Merge** SmartLink again.

   A pop-up appears, indicating that the patient records have been marked for the merge operation (right).

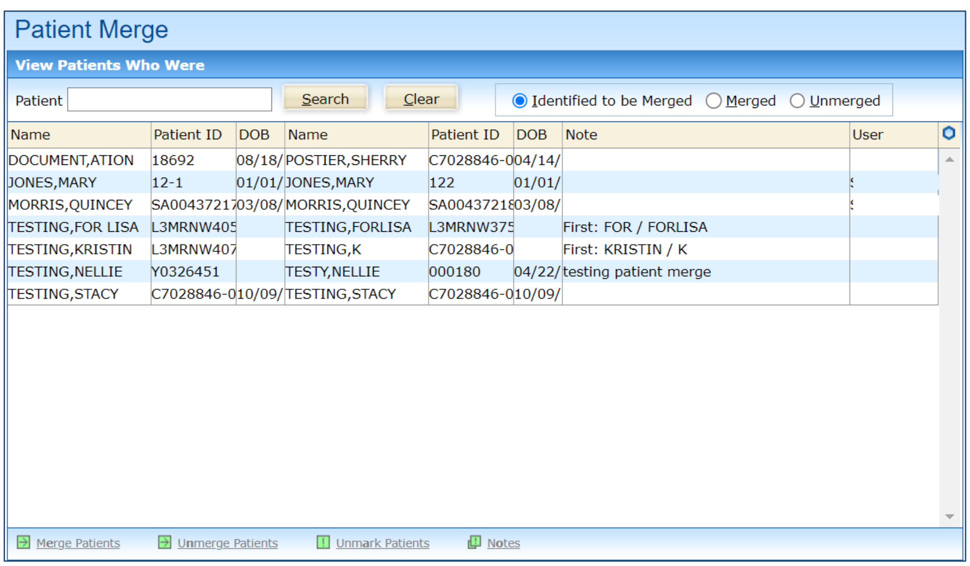


8. To continue, click the **OK** button. 

   Note: You can mark multiple patient records for merger by repeating steps 3–5.

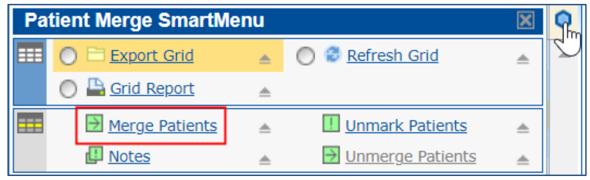
9. To display a list of patient records that have been marked for merger, at top right of the **Merge Patients** page, click the **Patient Merge List** button. 

   The **Patient Merge** page appears. At top right, the **Identified to be Merged** radio button is selected by default.

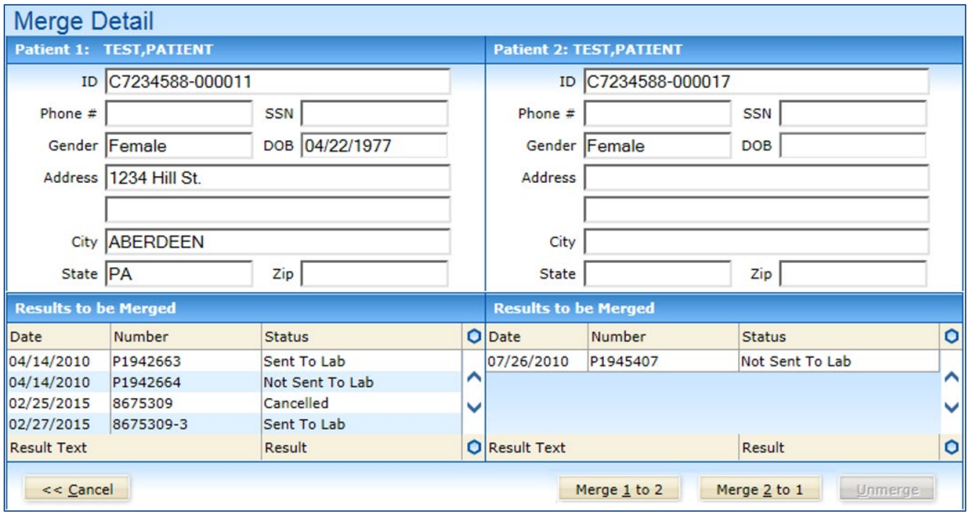


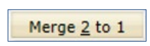
10. From the list, select the set of records you want to merge.
11. To start the merger, in the SmartLinks Bar, click the **Merge Patients** SmartLink. 

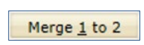
Tip: If the **Merge Patients** SmartLink does not appear in the SmartLinks Bar, it is available on the **Patient Merge SmartMenu** (right).



The **Merge Detail** page appears, showing a side-by-side comparison of the two patient records.

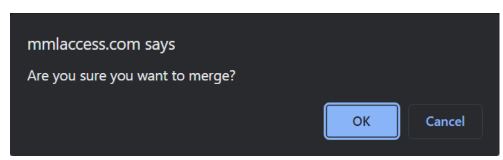


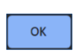
12. Compare the two records to determine which one you want to keep.
13. At bottom right:
    - If the patient information is complete and accurate in the first patient record but not in the second, click the **Merge 2 to 1** button. 

    - If the patient information is complete and accurate in the second patient record but not in the first, click the **Merge 1 to 2** button. 

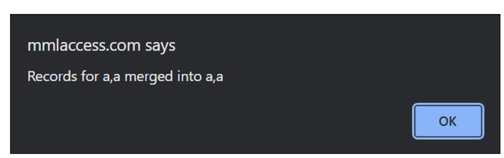
All orders and results are copied from the incomplete or inaccurate record to the complete, accurate one. The former record is not deleted, but its inaccurate or incomplete details no longer appear on the **Patient Demographics** or **Patient Information** page for that patient.

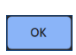
A pop-up asks you to confirm that you want to merge the two patient records (right).



14. To confirm, click the **OK** button. 

A second pop-up informs you when the merger is complete (right).



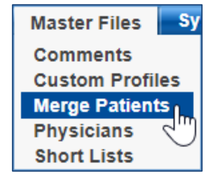
15. To confirm, click the **OK** button. 

Unmerging patient records

When patient records are merged, orders and results are copied 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:

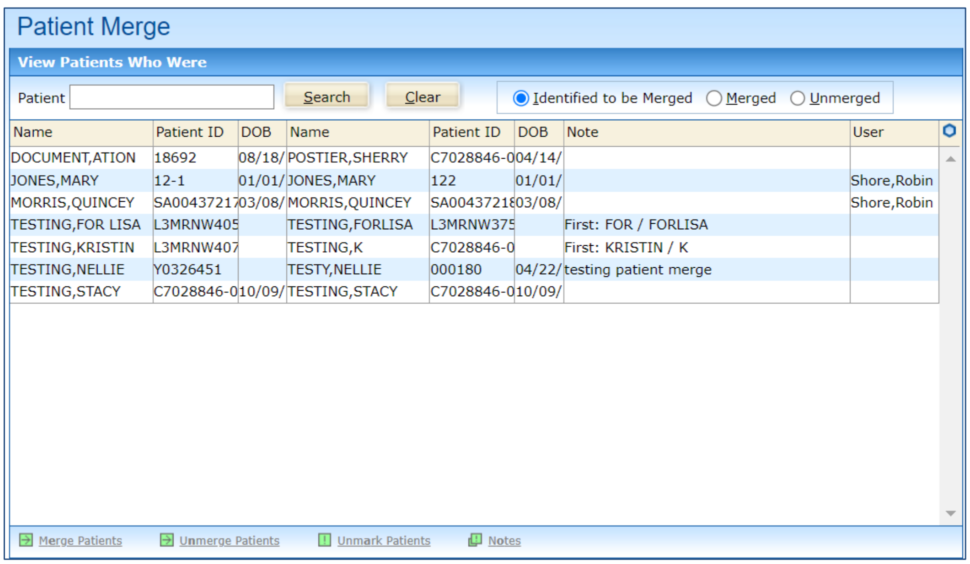


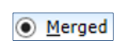
1. From the **Master Files** menu, select **Merge Patients** (right).

   The **Merge Patients** page appears.

2. At top right, click the **Patient Merge List** button. 

   The **Patient Merge** page appears. At top right, the **Identified to be Merged** radio button is selected by default.

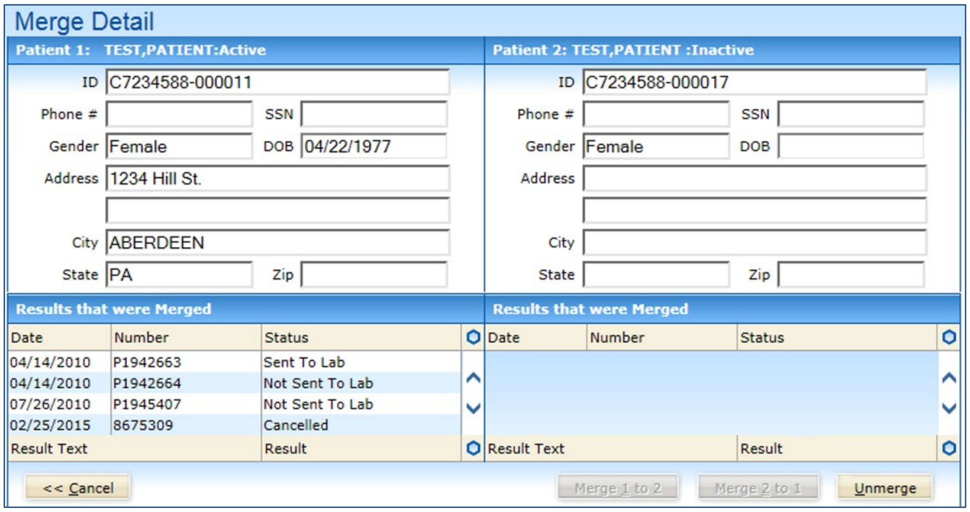


3. To display patient records that have been merged, click the **Merged** radio button. 

4. Select the set of patient records you want to unmerge.

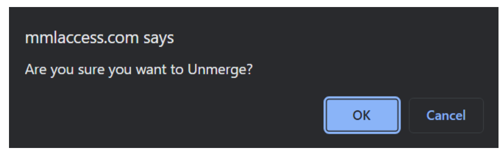
5. In the SmartLinks Bar, click the **Unmerge Patients** SmartLink. 

The **Merge Detail** page appears.



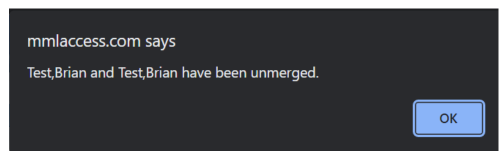
6. Verify that you selected the records you want to unmerge.
7. At bottom right, click the **Unmerge** button.

   A pop-up asks you to confirm that you want to unmerge the two patient records (right).



8. To confirm, click the **OK** button.

   A second pop-up informs you when the unmerge operation is complete (right).



9. To confirm, click the **OK** button.

Managing MayoACCESS users

As a MayoACCESS administrator, you can:

- Add users to MayoACCESS
- Change user details
- Inactivate a user

Adding a user

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

You will need the following information for each user:

- **Name:** last name, first name, middle initial (optional).
- **Email** address.
- Level of access. See step 11 below for Security Group definitions.

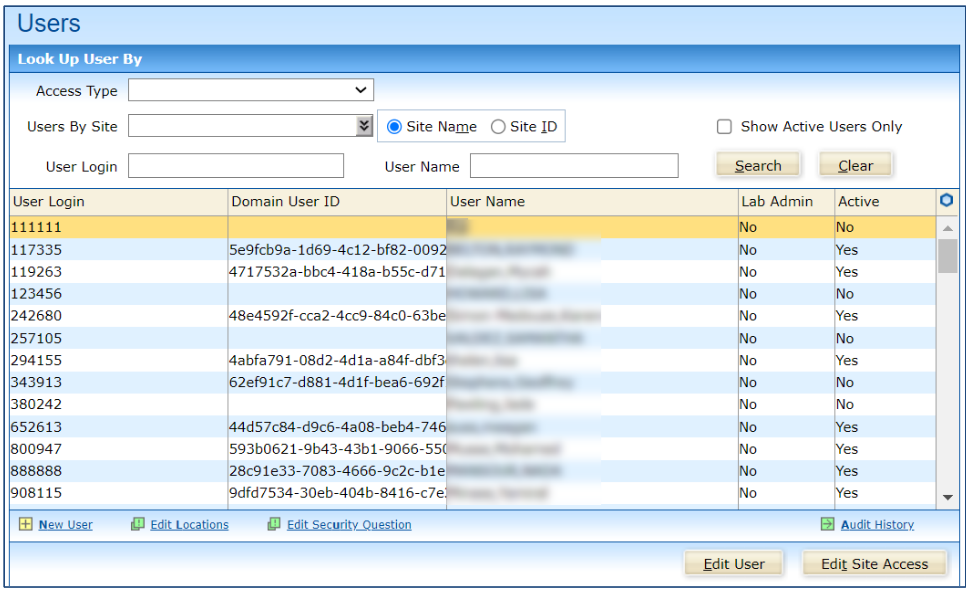
- The account number to assign to the user if the client site has multiple accounts.
- The three-letter prefix for the **User ID** that Mayo Clinic Laboratories provided to you.

To add a user:

Note: You must belong to the Client Supervisor Security Group to perform this task.

1. From the **System** menu, select **Users** (right).

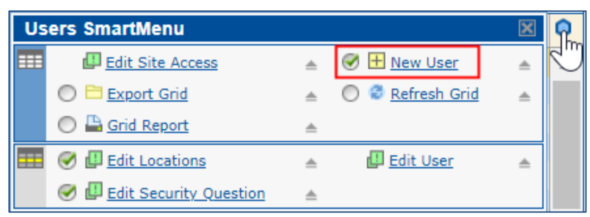
   The **Users** page appears.



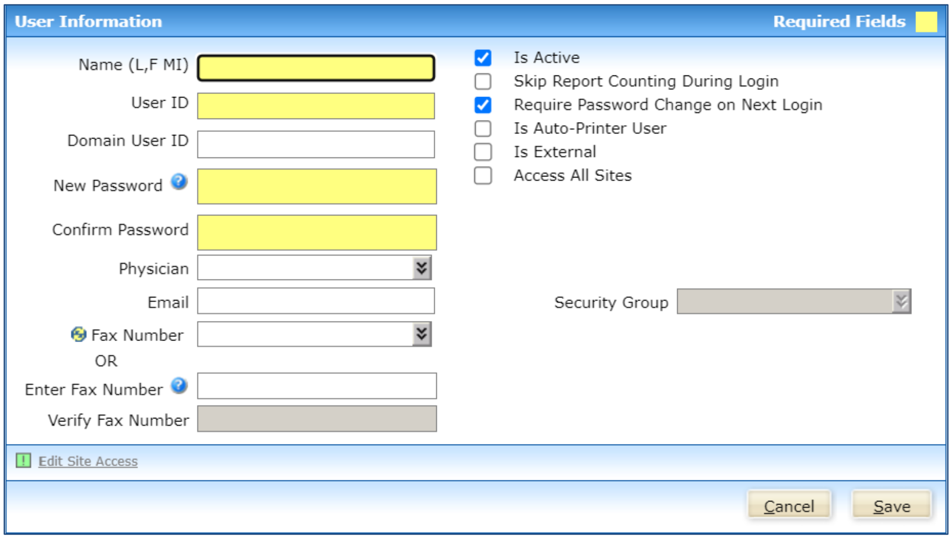
   Note: The **Lab Admin** column on the **Users** page is for MCL staff only.

2. At the left of the SmartLink Bar, click the **New User** SmartLink. 

   Tip: If the **New User** SmartLink does not appear in the SmartLinks Bar, it is available on the **Users SmartMenu** (right).



The **User Information** dialog box appears.



3. In the **Name** text field, enter the user's last name, a comma with no spaces around it, the user's first name, and, if applicable, the user's middle initial with a word space before it. For example:

    LASTNAME,FIRSTNAME M

4. In the **User ID** field, enter a unique identifier for the user, as follows:

    Three-letter prefix provided by Mayo Clinic Laboratories + user's last name + user's first initial

    For example, if the prefix provided by Mayo Clinic Laboratories is "ABC", and the user is John Smith, you can enter "ABCSMITHJ".

5. In the **New Password** text field, enter a new password.

    Note: The password must be a minimum of eight (8) characters and must contain:

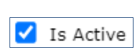
    - At least one (1) uppercase letter
    - At least one (1) lowercase letter
    - At least one (1) number
    - At least one (1) special character (except for "^")

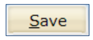
6. In the **Confirm Password** text field, re-enter the same new password.

    Note: The **User ID** and **Password** you enter into the **User Information** dialog box are used only for setup. The user does not need to know them.

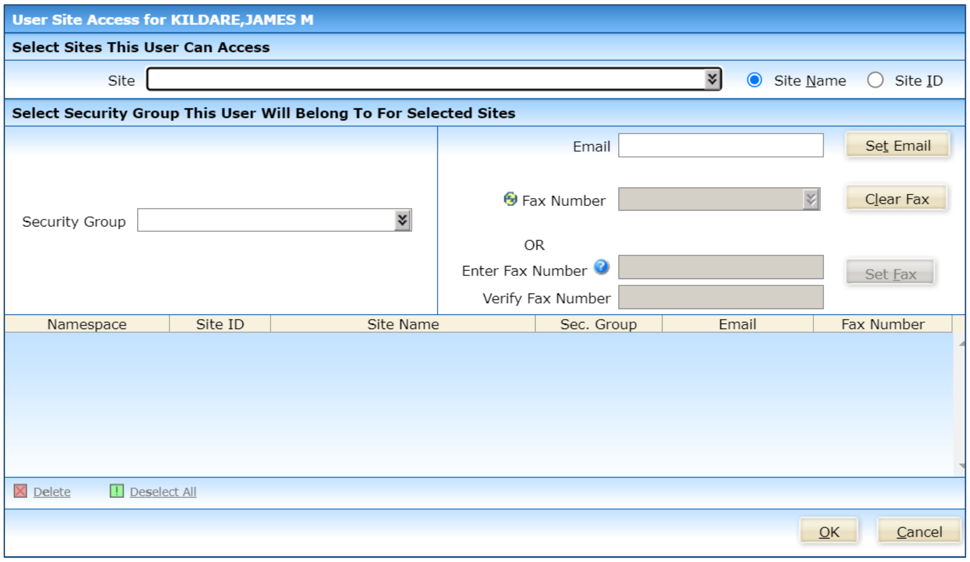
7. In the **Email** field, enter the email address that the user provided when registering on MayoClinicLabs.com.

    Note: If the user has not completed their registration on MayoClinicLabs.com, they will receive an email prompting them to finish setting up their profile.

8. At top right, verify that the **Is Active** box is checked. 

9. Click the **Save** button. 

   The **User Site Access for [user name]** dialog box appears.



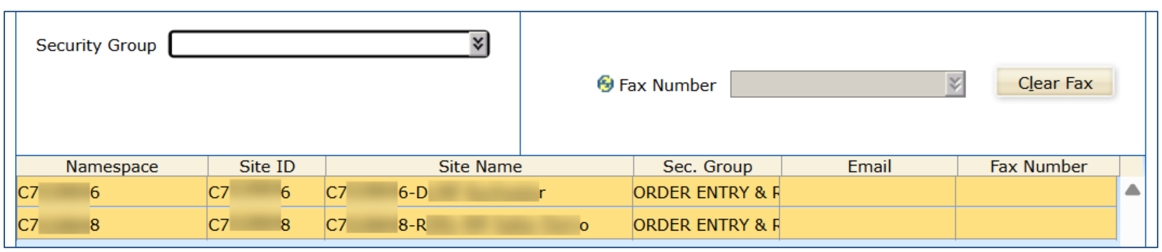
10. In the **Select Sites This User Can Access** section, from the **Site** drop-down menu, select the site you want this user to access. You can select more than one site for each user.
11. In the **Select Security Group This User Will Belong To For Selected Sites** section, from the **Security Group** drop-down menu, select the access level for this user. You can choose from the following levels, which are presented in ascending order:

Security Group	Available tasks
Test Catalog	• Access the Directory of Services This is the most basic role. The user cannot access client information or patient data.
Test Catalog & Results	• Access the Directory of Services • Access test results for assigned site The user has access to the Directory of Services and test results only.
Order Entry	• Access the Directory of Services • Order tests The user can order tests but not access test results.

Security Group	Available tasks
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 • Access test results via **Pathology Results** landing page (as assigned by settings) This role is commonly assigned to physicians and pathologists for the purpose of viewing results.
Client Supervisor	• Access the Directory of Services • Order tests • Access test results • Access test utilization reports • Set up new users in the application Users assigned to this security role can act as administrators for the client site. Multiple users for a given account can have this role.

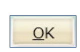
Note: If you have selected multiple sites for this user and want to select a different security level for each site, you must select each site and then set its security level individually.

The **Site Name(s)** and **Security Group(s)** appear in the table row at the bottom of the section.

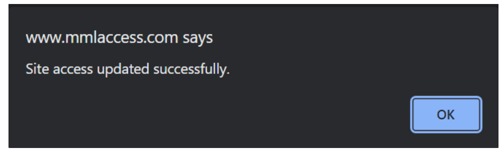


Note: The **Site Name** also appears in the **Site** field at top, but the **Security Group** does not appear in the **Security Group** field.

<u>Important:</u> Do not enter the user's email address in the **User Site Access for [user name]** dialog box. Duplicate email address entries cause the user to receive duplicate notifications.

12. To save these settings, at bottom right, click the **OK** button. 

A pop-up appears, indicating that site access was updated successfully for the user (right).



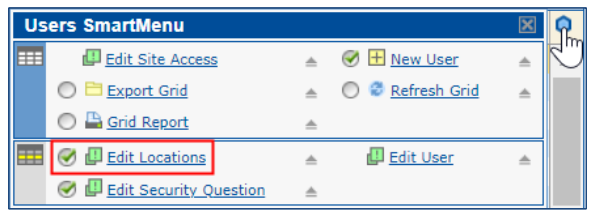
13. At bottom right of the pop-up, click the **OK** button. 

You are returned to the **Users** page.

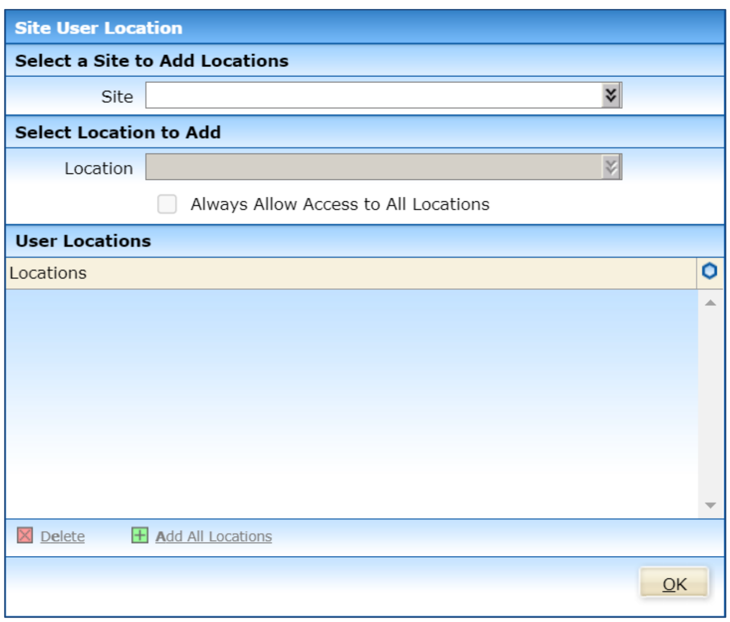
14. Find the user in the User List, using one or more of the fields in the **Look Up User By** section.

15. To assign the user access to a location within each site, highlight the user and in the SmartLinks Bar, click the **Edit Locations** SmartLink. 

Tip: If the **Edit Locations** SmartLink does not appear in the SmartLinks Bar, it is available on the **Users SmartMenu** (right).



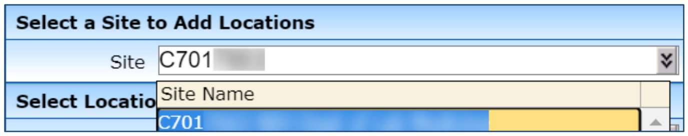
The **Site User Location** dialog box appears.



16. In the **Select a Site to Add Locations** section, do one of the following:

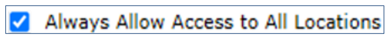
- From the **Site** drop-down menu, select the site for this user.

- In the **Site** field, enter the account number and press your **Enter** key.



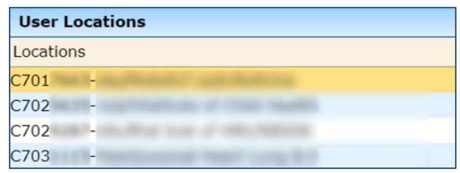
If the site has only one location, that location will appear in the **User Locations** section.

17. If the site has multiple locations, do one of the following:

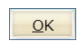
    - In the **Select Location to Add** section, from the **Location** drop-down menu, select the location.
    - Below the **Location** drop-down menu, check the **Always Allow Access to All Locations** box. 

      This gives the user access to all the locations for this site.
    - In the SmartLinks Bar, click the **Add All Locations** SmartLink. 

      The **User Locations** section displays all locations for this site (right).

      Note: You can give the user access to more than one location.

18. At bottom right of the dialog box, click the **OK** button. 

    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.

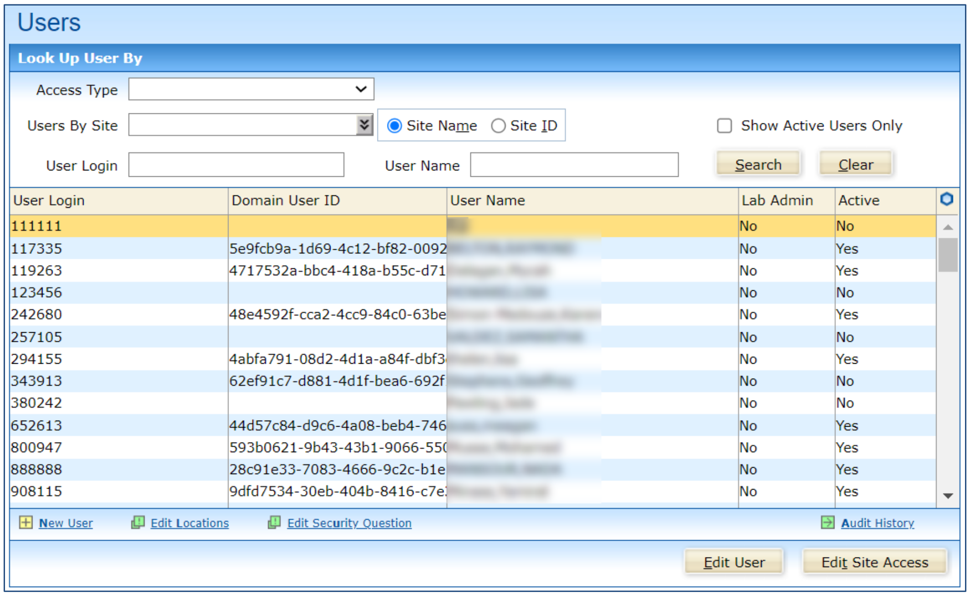
Changing user information

To change a user's information in MayoACCESS:

Note: You must belong to the Client Supervisor Security Group to perform this task.

1. Have the user update their information on the **Settings** page of mayocliniclabs.com. Until this is done, you cannot change their information in MayoACCESS.
2. From the **System** menu, select **Users** (right).

The **Users** page appears.



3. At left, from the **Users By Site** drop-down menu, select a site to display its user records.

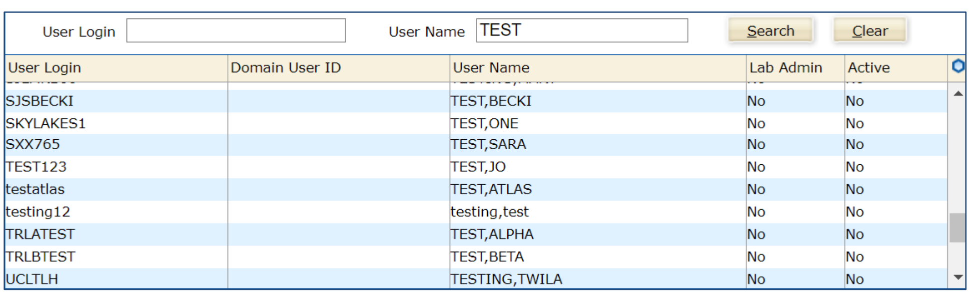
Tips:

- To search all records, leave the **Users By Site** text field blank.
- To display the list of sites by name or by site ID, select the **Site Name** or the **Site ID** radio button. Site Name Site ID

4. In either the **User Login** or **User Name** text field, enter some or all characters of the user's ID or name.

5. At right, click the **Search** button. Search

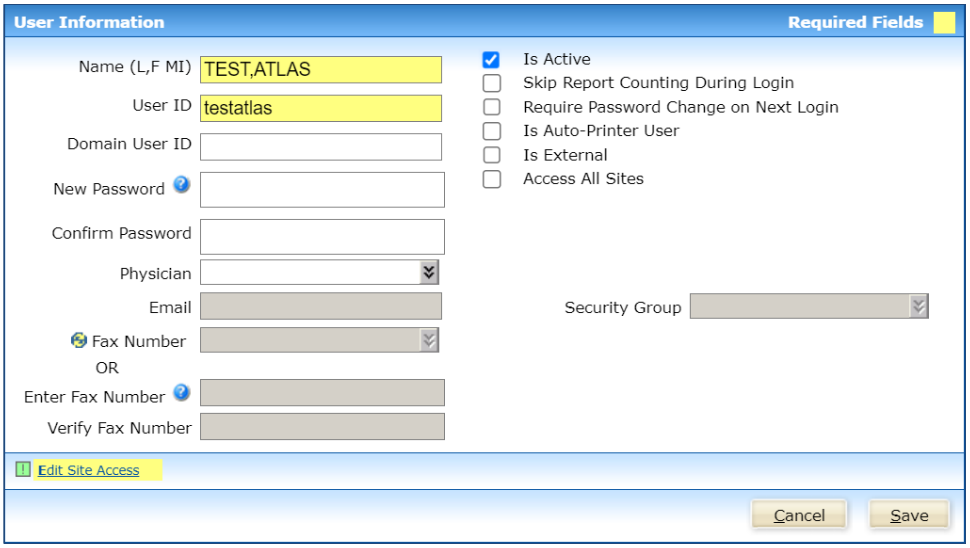
   A list of users matching the characters you entered appears.



6. Select the user record you want to change.

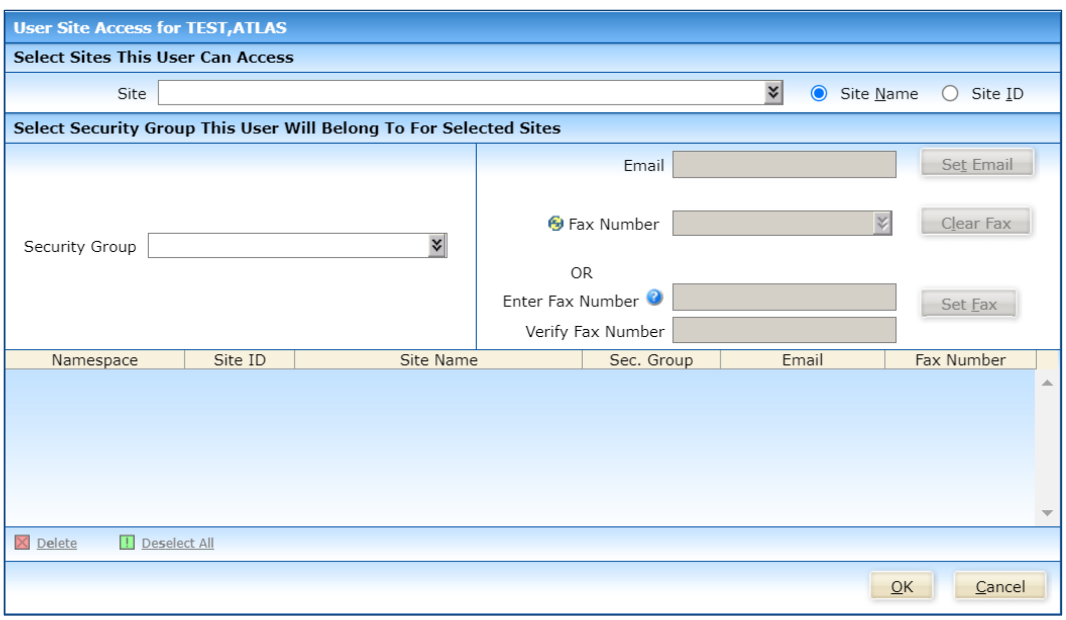
7. At bottom right, click the **Edit User** button. Edit User

The **User Information** dialog box appears.



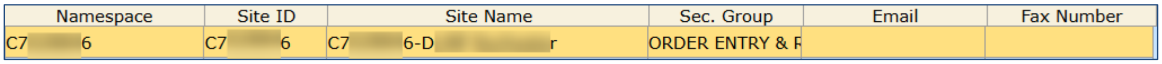
8. To change any user information aside from site access and Security Group, enter it into the text field(s) or select it from the drop-down menu(s) on the left side of the dialog box.
9. To change which site(s) the user can access, or to change the user's Security Group, in the SmartLinks Bar, click the **Edit Site Access** SmartLink. 

   The **User Site Access for [username]** dialog box appears.



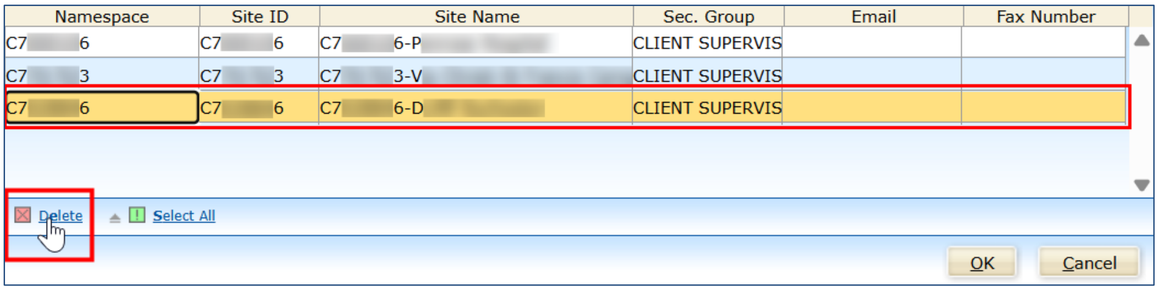
10. To change the site that the user can access, in the **Select Sites This User Can Access** section, select the desired site from the **Site** drop-down menu.
11. To change the user's security access, in the **Select Security Group This User Will Belong To For Selected Sites** section, select the desired security level from the **Security Group** drop-down menu.

The new **Site Name** and **Security Group** values appear in the list below.



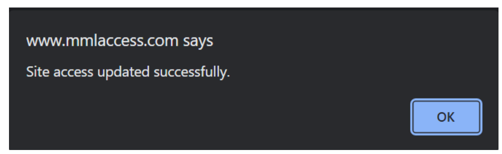
12. To assign the user access to locations within each site to which you have granted them access, follow steps 15–18 under Adding a user.

13. To remove a user's access from a site, select it in the list of assigned sites. Then, at bottom left of the dialog box, click the **Delete** SmartLink. Delete



14. To save your changes, at bottom right, click the **OK** button. OK

A pop-up appears, indicating that site access was updated successfully for the user (right).



15. At bottom right of the pop-up, click the **OK** button. OK

You are returned to the **User Information** dialog box.

16. To apply the changes and close the user record, at bottom right of the dialog box, click the **Save** button. Save

Inactivating a user

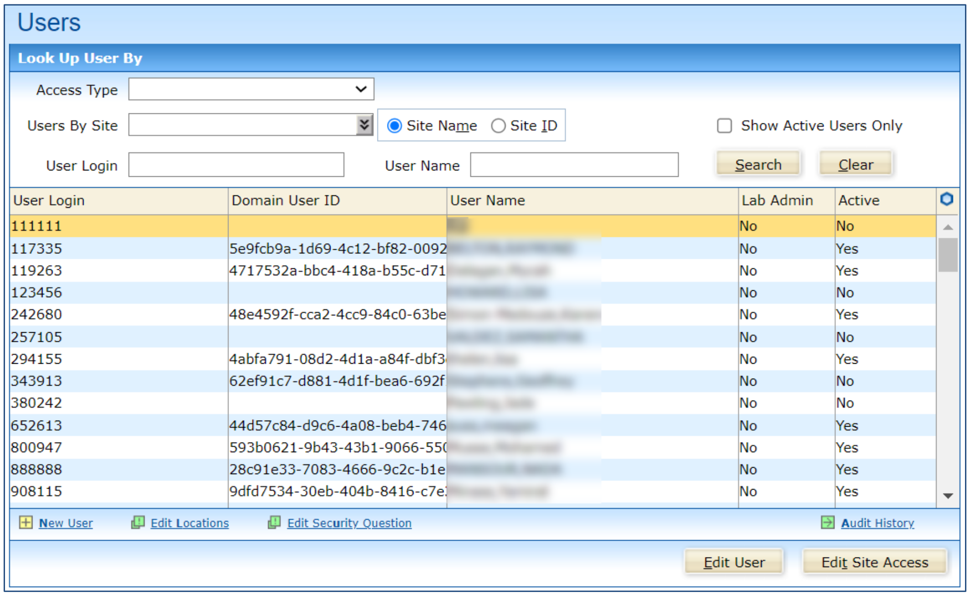
User records cannot be deleted. Therefore, to prevent a user from accessing MayoACCESS, you must inactivate that user.

Note: You must belong to the Client Supervisor Security Group to perform this task.

To inactivate a user:

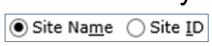
1. From the **System** menu, select **Users** (right).

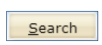
The **Users** page appears.



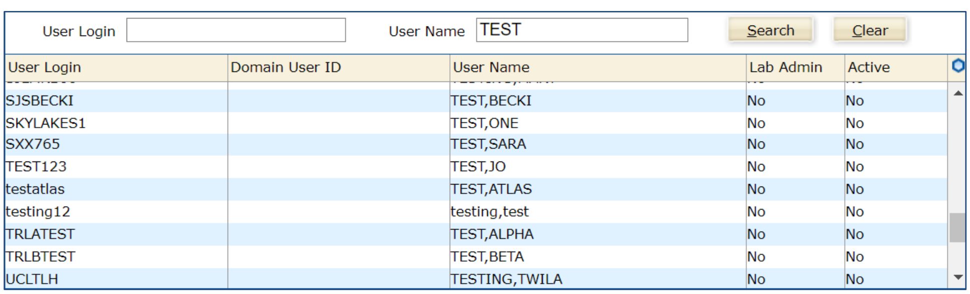
2. At left, from the **Users By Site** drop-down menu, select a site to display its user records.

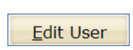
Tips:

- To search all records, leave the **Users By Site** text field blank.
- To display the list of sites by name or by site ID, select the **Site Name** or the **Site ID** radio button. 

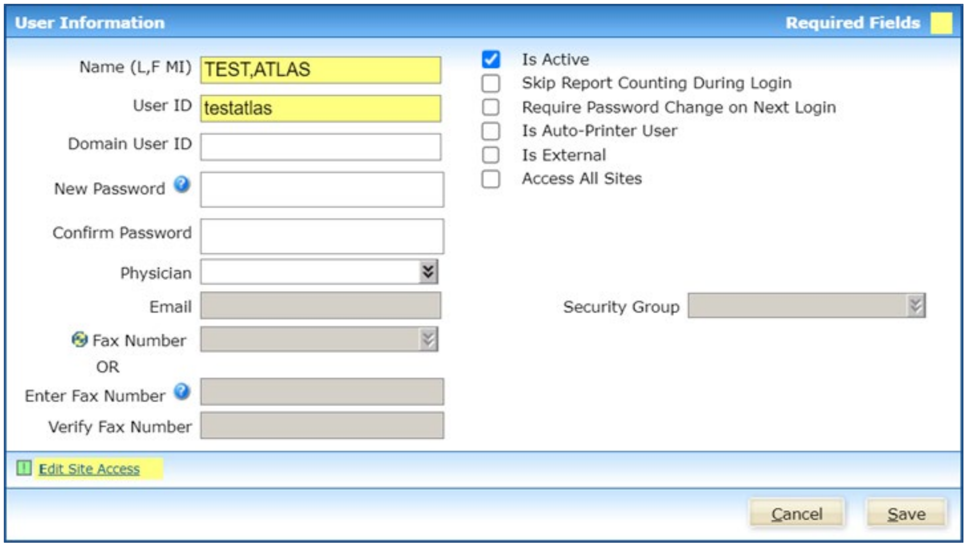
3. In either the **User Login** or **User Name** text field, enter some or all characters of the user's ID or name.
4. At right, click the **Search** button. 

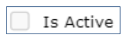
A list of users matching the characters you entered appears.

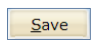


5. Select the user record you want to change.
6. At bottom right, click the **Edit User** button. 

The **User Information** dialog box appears.



7. At top right, clear the **Is Active** box. 

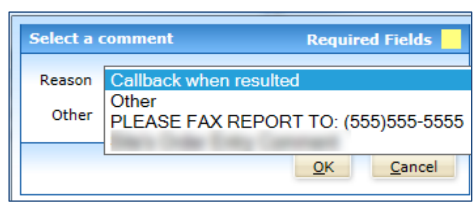
8. To save your changes, click the **Save** button. 

Customizing MayoACCESS

As an administrator, you can customize MayoACCESS for your users in the following ways:

- Creating and managing comments
- Creating custom profiles
- Creating lists of frequently ordered tests

Creating and managing comments

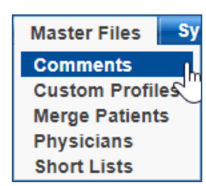


You can create comments that users can select when they perform certain actions in MayoACCESS. The screenshot on the right shows comments that could be displayed when a user clicks the **Report Note** link on the **New Order** page, for example.

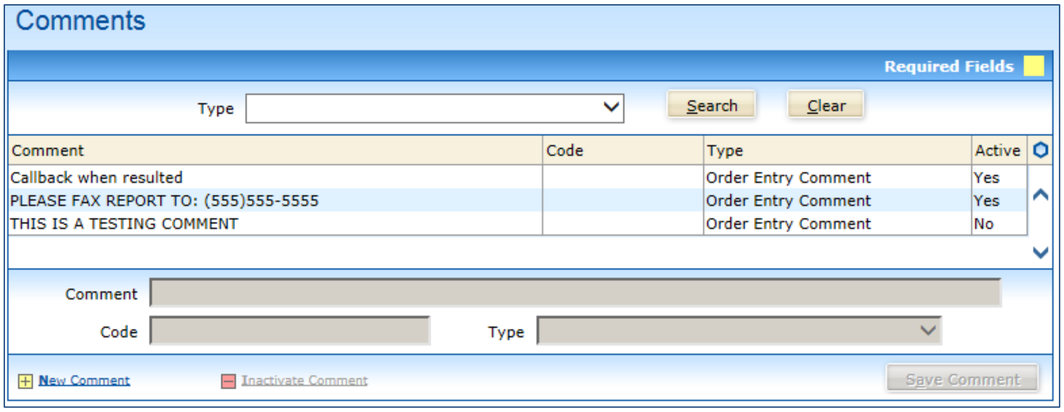
To create a comment:

Note: You must belong to the Client Supervisor Security Group to perform this task.

1. From the **Master Files** menu, select **Comments** (right).

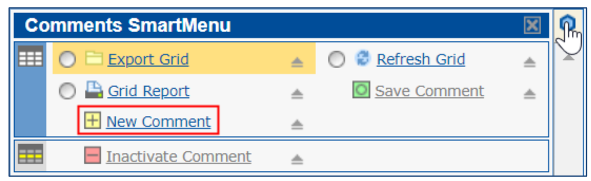


The **Comments** page appears.

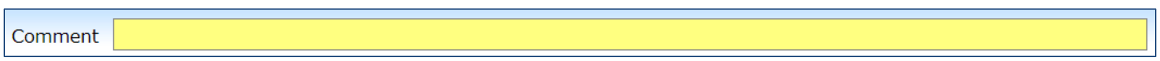


2. At the left of the SmartLinks Bar, click the **New Comment** SmartLink. 

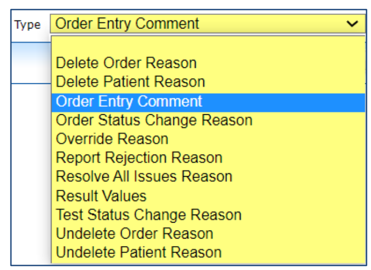
Tip: If the **New Comment** SmartLink does not appear in the SmartLinks Bar, it is available on the **Comments SmartMenu** (right).

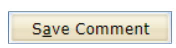


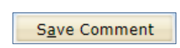
3. In the **Comment** text field, enter the comment you want to add.

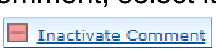


4. From the **Type** drop-down menu, select the activity for which you want the comment to be displayed (right).

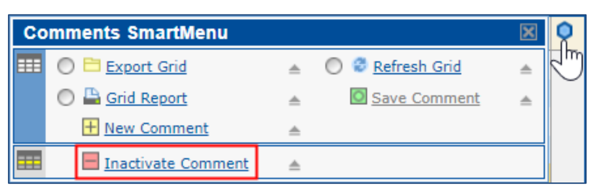


5. At bottom right, click the **Save Comment** button. 

To change a comment, select it, change its text, and then click the **Save Comment** button. 

To inactivate a comment, select it, and then click the **Inactivate Comment** SmartLink in the SmartLinks Bar. 

Tip: If the **Inactivate Comment** SmartLink does not appear in the SmartLinks Bar, it is available on the **Comments SmartMenu** (right).



Creating and managing custom profiles

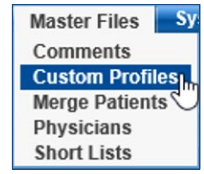
You can create a single code under which to group multiple tests. This code is called a custom profile. Custom profiles save time when users frequently order the same tests together. You can create, change, or delete a custom profile.

Notes:

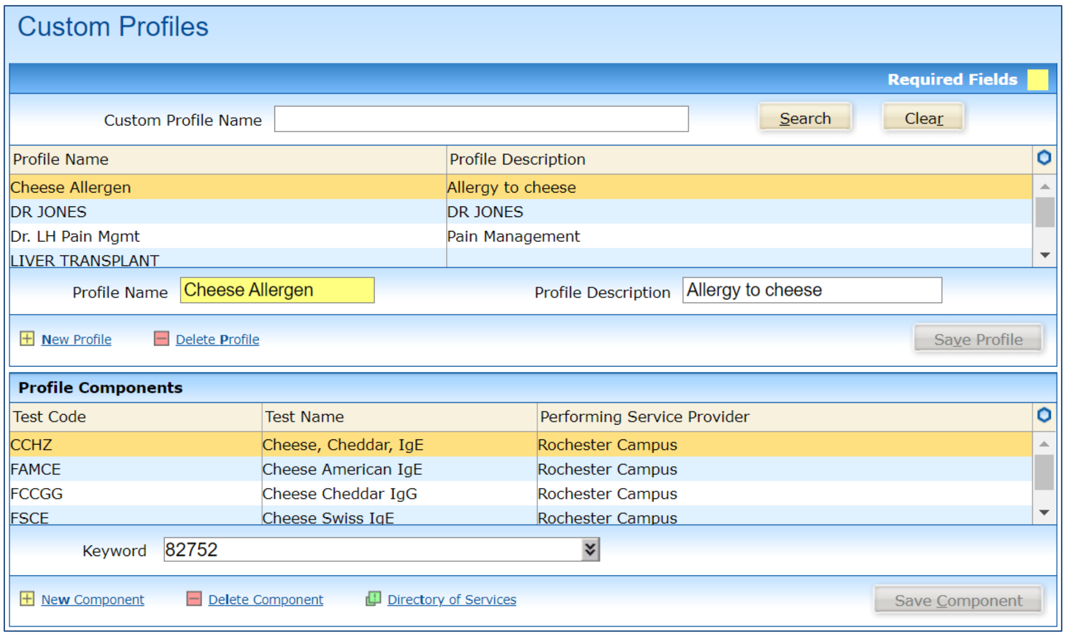
- Custom profiles cannot be used for interfaced orders.
- You must belong to the Client Supervisor Security Group to perform this task.

To create a custom profile:

1. From the **Master Files** menu, select **Custom Profiles** (right).

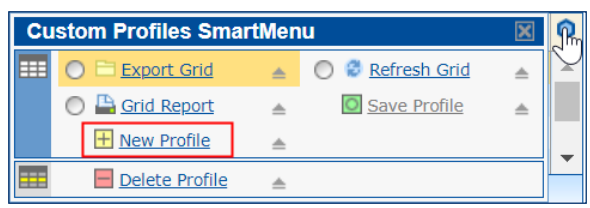


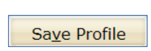
   The **Custom Profiles** page appears.

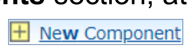


2. In the top section, at the left of the SmartLinks Bar, click the **New Profile** SmartLink.

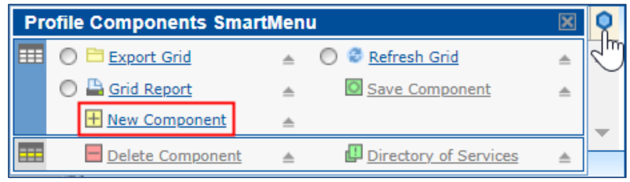
   Tip: If the **New Profile** SmartLink does not appear in the SmartLinks Bar, it is available on **Custom Profiles SmartMenu** (right).

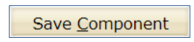


3. Above the SmartLinks Bar, in the **Profile Name** text field, enter a name for the custom profile.
4. **Optional:** In the **Profile Description** text field, enter a description for the custom profile.
5. At bottom right, click the **Save Profile** button. 

6. In the **Profile Components** section, at the left of the SmartLinks Bar, click the **New Component** SmartLink. 

Tip: If the **New Component** SmartLink does not appear in the SmartLinks Bar, it is available on the **Profile Components SmartMenu** (right).



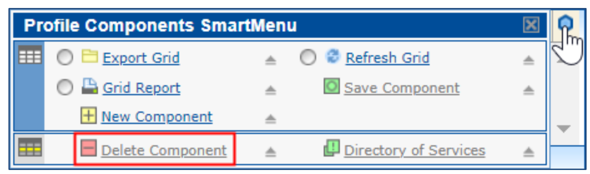
7. Do one of the following:
    - From the **Keyword** drop-down menu, select a test.
    - In the **Keyword** text field, enter a test name, code, or mnemonic.
8. At bottom right, click the **Save Component** button. 

9. To add more tests to the custom profile, repeat steps 7 and 8 for each.

   Note: If you do not click the **New Component** SmartLink before adding a second or subsequent test, the new test replaces the test currently shown.

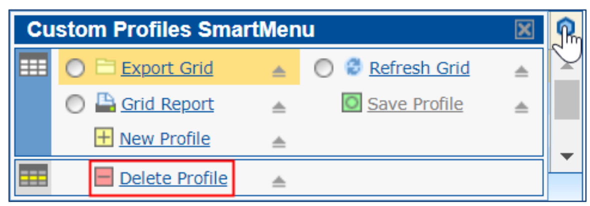
To delete a test from a custom profile, highlight it and, in the SmartLinks Bar, click the **Delete Component** SmartLink. 

Tip: If the **Delete Component** SmartLink does not appear in the SmartLinks Bar, it is available on the **Profile Components SmartMenu** (right).



To delete a custom profile, highlight it and, in the SmartLinks Bar, click the **Delete Profile** SmartLink.


Tip: If the **Delete Profile** SmartLink does not appear in the SmartLinks Bar, it is available on the **Custom Profiles SmartMenu** (right).



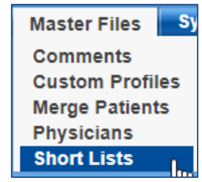
Creating a Short List of frequently ordered tests

A list of frequently ordered tests is called a Short List. The Short List appears on the **New Order** page when you select the **Standard Order Entry** option, enabling users to quickly select a test rather than have to look it up. Short Lists can be created for and organized by site, physician, or specialty.

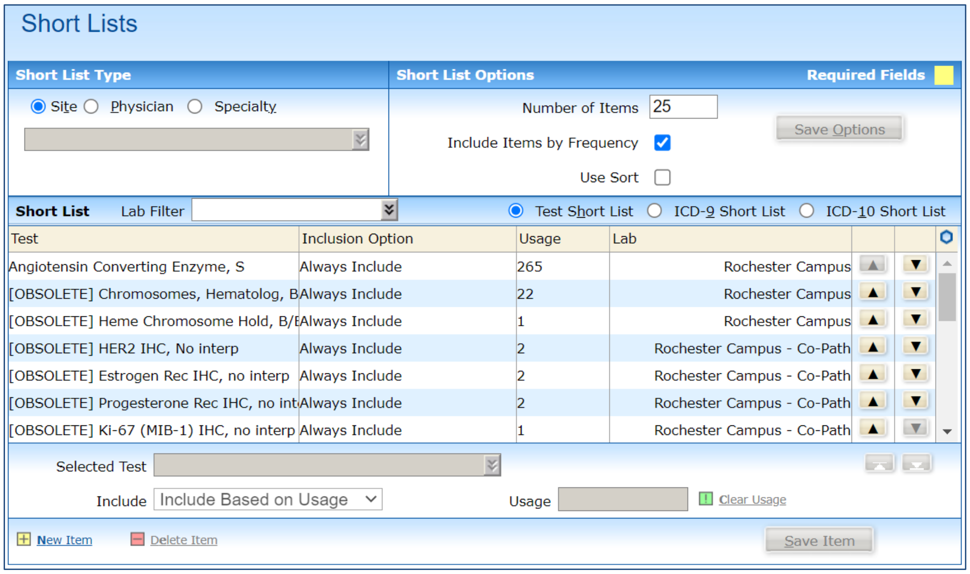
Note: You must belong to the Client Supervisor Security Group to perform this task.

To create a Short List:

1. From the **Master Files** menu, select **Short Lists** (right).



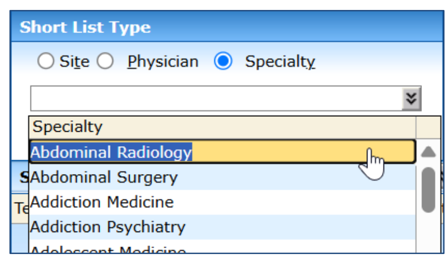
The **Short Lists** page appears.

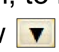


2. Use the fields above the list of tests to tailor your Short List to your needs:

   - **Short List Type:** At top left, select the **Site**, **Physician**, or **Specialty** radio button.

     If you choose **Physician** or **Specialty,** the drop-down menu below becomes active, and you can select the desired physician or specialty from it (right).

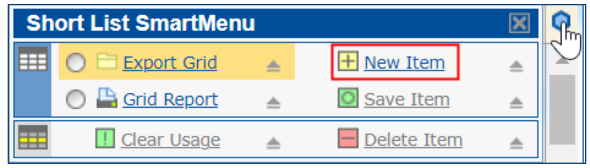


   - In the **Short List Options** section:
     - In the **Number of Items** text field, enter the value for how many items you want the Short List to contain.
     - To fill out any open spaces in the Short List with supply items that are marked as **Include Based on Usage**, check the **Include Items by Frequency** box.
     - To enable manual reordering of the list, check the **Use Sort** box. Then, to move tests higher or lower on the list, use the up-arrow  and down-arrow  buttons in the rightmost columns, respectively.
   - In the blue Short List row:
     - **Optional:** From the **Lab Filter** drop-down menu, select the laboratory by which you want to filter search results.

- Select the desired radio button to indicate whether this will be a **Test Short List**, **ICD-9 Short List**, or **ICD-10 Short List**.

3. To add a test, in the SmartLinks Bar, click the **New Item** SmartLink. 

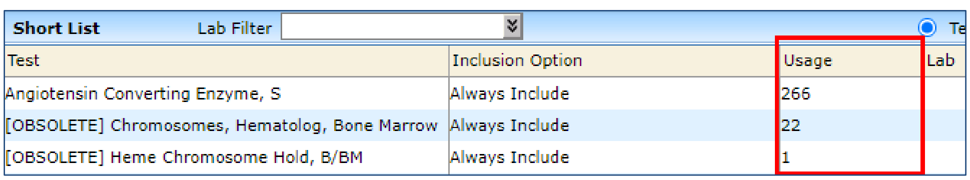
   Tip: If the **New Item** SmartLink does not appear in the SmartLinks Bar, it is available on the **Short List SmartMenu** (right).



4. At bottom left, do one of the following:
   - From the **Selected Test** drop-down menu, select a test.
   - In the **Selected Test** text field, enter a test name, code, or mnemonic.
5. From the **Include** drop-down menu, select the conditions under which the test should be displayed in the **Short List**. The available options are as follows:

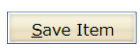
Option	Description
Include Based on Usage	Tests are shown based on how frequently they are ordered.
Always Include	The selected test is always shown in the **Short List**.
Never Include	The selected test is never shown in the **Short List**.

6. The **Usage** field is a counter of how many times the **Selected Test** has been ordered by the account you are signed in under.



Test	Inclusion Option	Usage	Lab
Angiotensin Converting Enzyme, S	Always Include	266	
[OBSOLETE] Chromosomes, Hematolog, Bone Marrow	Always Include	22	
[OBSOLETE] Heme Chromosome Hold, B/BM	Always Include	1	

   If you want to reset the value of this field to **0**, click the **Clear Usage** SmartLink. 

7. At bottom right, click the **Save Item** button. 

To delete a test from the **Short List**, select it, and then, in the SmartLinks Bar, click the **Delete Item** SmartLink. 

Tip: If the **Delete Item** SmartLink does not appear in the SmartLinks Bar, it is available on the **Short List SmartMenu** (right).