Seamless Exchange integrates external and internal patient data readily within existing Workflow MPages. Clinical staff can effortlessly reconcile outside records during the patient's intake following the workflow outlined below.

Seamless Exchange Workflow

Reconciliation of outside records can be completed through **Workflow MPage** components. Information entered in the system by a patient or documented by other facilities, enables the clinician to synchronize a patient's record by merging outside and local information.

NOTE: **Seamless Exchange may be viewable within Workflow MPages but may not be part of normal routine. Reconciliation of Seamless Exchange components are recommended if this is part of your clinical workflow.**

Allergies

If outside records exist, a ◆ **purple diamond** will appear next to the label **Outside Records** within the Workflow MPage.

STEP 1:   Click **View Records** to reconcile allergies.

STEP 2:   Click the **Add** button or click the dropdown to view the following options:

- Add
- Add with Changes

STEP 3:   Select **Add with Changes** to **modify** fields such as Category, Severity, Type, Status, and Source.

NOTE: **Required fields may be indicated when adding allergies with changes.**

STEP 4:   Click **Save**.

- Added Allergies are saved to the Local Record.

STEP 5:   To **dismiss** an allergy, click the **Reject** button.

- To undo, click the **Undo** button under the Actions column.

STEP 6:   Click **Mark as Reviewed** when completed.
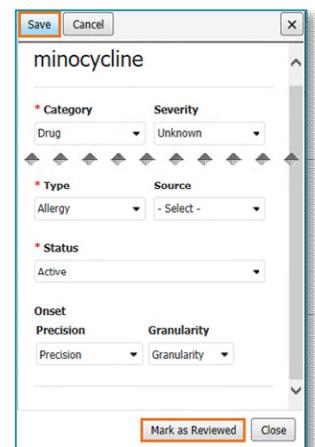
NOTE: **Mark as Reviewed is now the Reconcile Action.**

NOTE: **For more information on Allergy documentation, click here.**

Home Medications

If outside records exist, a ◆ **purple diamond** appears next to the label **Outside Records**.

STEP 1: Click **View Records** to reconcile outside home medications.

STEP 2: Click the **Add** button under the Actions column.

- The medication populates to the **right** in purple.

STEP 3: **Scroll down** to see the medication details.

STEP 4: The following medication details can be updated:

- **Dose**
- **Route**
- **Frequency**
- **Duration**

NOTE: **Medications older than six months or medications with an inactive status will not appear for reconciliation review. Click All in the Date Range dropdown or the Inactive dropdown under Status.**

STEP 5: Update **Compliance** then click **Save**.

- The medication will be added to the **Local Record**.

STEP 6: Click **Reject Remaining** for medications that are no longer active. Reject Remaining (10)
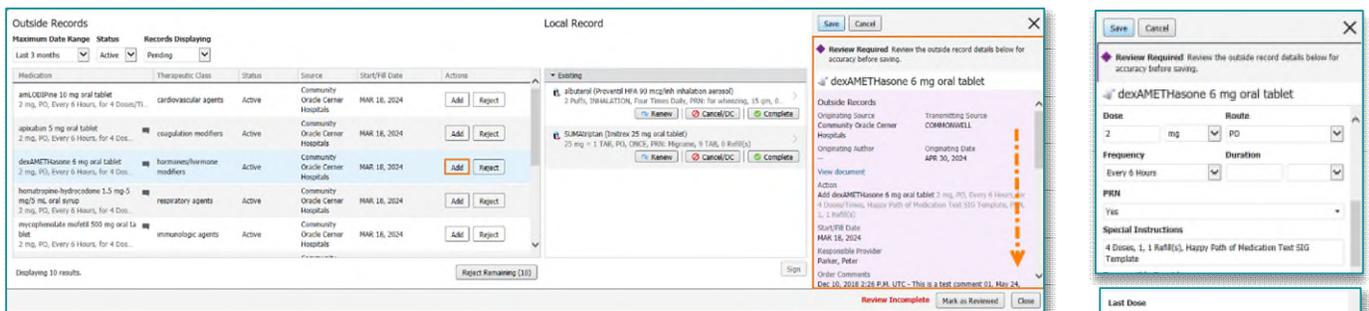
STEP 7: Click **Mark as Reviewed** when completed.

NOTE: **Mark as Reviewed is now the Reconcile Action.**

STEP 8: Update **Compliance** then click **Save**.

- The medication will be added to the **Local Record**.

STEP 9: To dismiss a medication, click the **Reject** button under the Actions column. Add Reject

NOTE: **If a medication was rejected in error, click *undo* next to Reject.**

Histories (Procedures)

If outside procedure history records exist, a ◆ **purple diamond** appears on the **Procedure** tab as well as the label, **Outside Records**. Only procedure history will appear for outside records.

STEP 1: To reconcile procedures, navigate to the **Histories** component within the Workflow MPage.
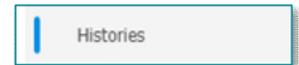
STEP 2: Click the **View Records** button from the top right of the screen.
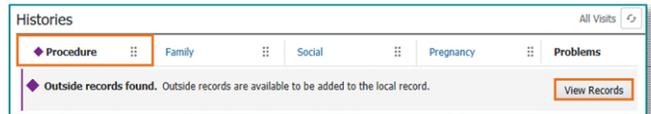
- Local records open to the right.
- Outside records open to the left of the screen.

STEP 3: Review the patient's procedure history and click the **Add** button, or click the dropdown to view the following options:

- Add
- Add with Changes
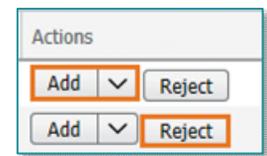
STEP 4: Select **Add with Changes** to modify fields such as Procedure Date/Time, Laterality, Ranking, and Comments.

STEP 5: Click **Save**.

- The procedure will be added to the local record.

STEP 6: To dismiss a procedure, click the **Reject** button.

STEP 7: Click **Reject Remaining** for procedures that may be duplicate or already exist within the local record. Reject Remaining (10)
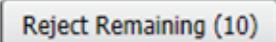
NOTE: **A deduplication and filtering process exists.**

STEP 7: Once reconciliation is complete, click **Mark as Reviewed**.

NOTE: **Mark as Reviewed is now the Reconcile Action.**

NOTE: **The Problems tab position can be moved by clicking and dragging with the mouse. Click the Exit button to Save.**