Northern Light Health

From the Office of Clinical Informatics

# Seamless Exchange Provider Workflow

July 9, 2024

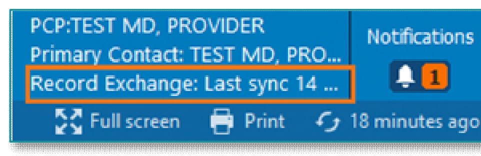
**Seamless Exchange integrates external with internal patient data readily within existing Provider workflow, ensuring a comprehensive record of a patient's care across the continuum, regardless of source. Seamless Exchange offers effortless capabilities through deduplication and filtering, reducing the data burden during the reconciliation process.**

## Workflow MPage Reconciliation

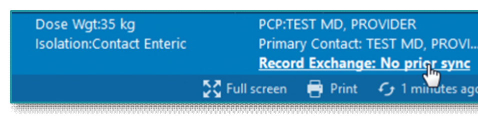
Reconciliation of outside records can be completed through workflow components. Information entered in the system by a patient or documented by other facilities, enables the clinician to synchronize a patient's record by merging external and local information.

## Patient Banner Bar Record Exchange Sync

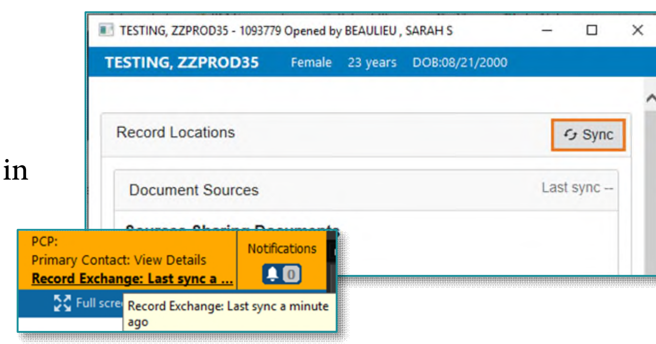
Patients with new registrations and admissions will trigger a query to Seamless Exchange to sync the patient's record. This information can be found within the patient's banner bar.




- If a sync has occurred, it will not trigger another.
  - A new sync is not needed.
- If the sync status is Partial Success, the sync is successful.
  - A new sync is not needed.
- If the sync status is **No prior sync**, a manual sync can be completed.




- To complete a manual sync, click the **Record Exchange: No Prior Sync status** within the Banner Bar.
  - A window will open. Click **Sync**.
  - Close out of the window.
  - The Record Exchange sync status will update in the banner bar when the sync is completed.




## Seamless Exchange Components:

## Allergies

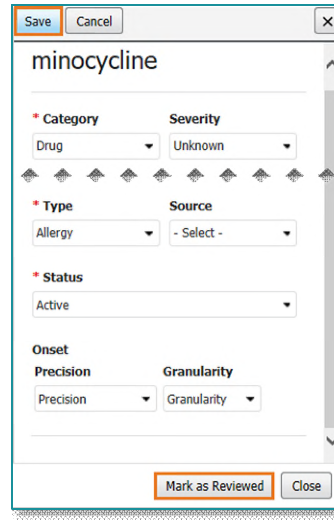
If outside records exist, a **purple diamond** appears next to the label **Outside Records**.

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.

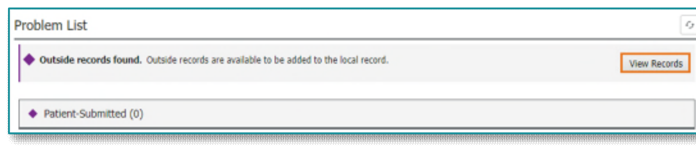
- To undo, click the **Undo** button under the Actions column.

STEP 6: Click **Mark as Reviewed.**

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

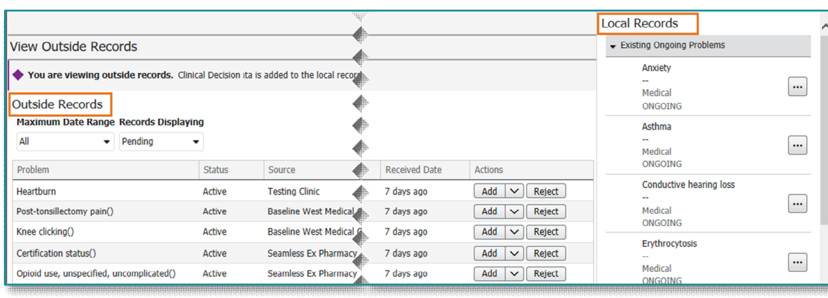
## Problem List

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



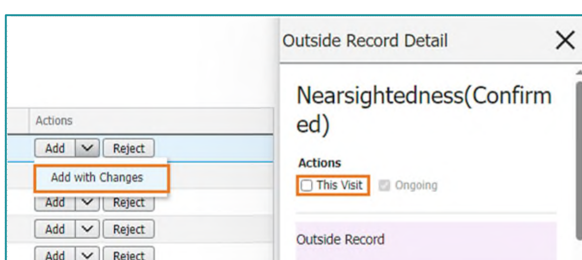

**STEP 1:** Click **View Records** on the right of the screen.

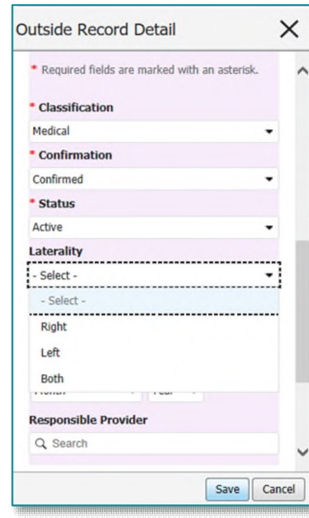
- **Outside data** opens to the **left** of the screen, while **local data** will open to the **right**.




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

- Add
- Add with Changes





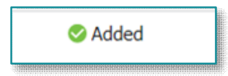

**STEP 3**: Select **Add with Changes** to modify **Status, Laterality** and **Onset Date/Time.**

- Problem can be selected as a **This Visit** problem.

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

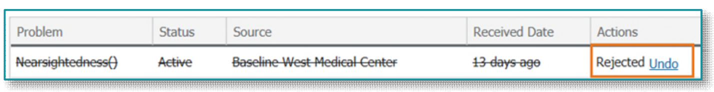
**STEP 4**: Click **Save**, to add.

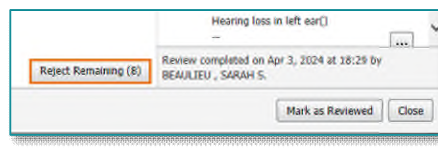
- A green checkmark will appear after a problem has been added to the local record under the Actions column.




**STEP 5**: To **dismiss** a problem, click the **Reject** button under the Actions column.

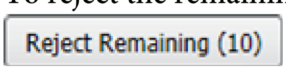
- To undo the rejection, click **Undo** under the Actions




column.

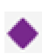
- To reject the remaining problems, click **Reject Remaining.**




**STEP 6**: Click **Mark as Reviewed** to complete reconciliation.

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

## Home Medications

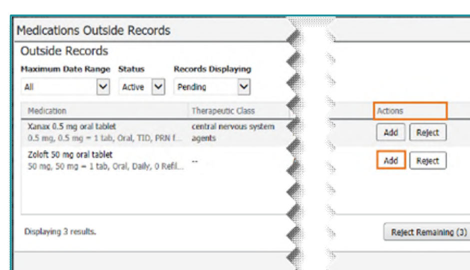
If outside records exist, a  **purple diamond** will appear next to the label **Outside Records**.

**NOTE: Reconciling home medications increases the accuracy of the medication reconciliation process.**

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

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

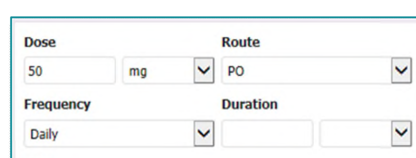
- The medication will populate to the **right** in purple.



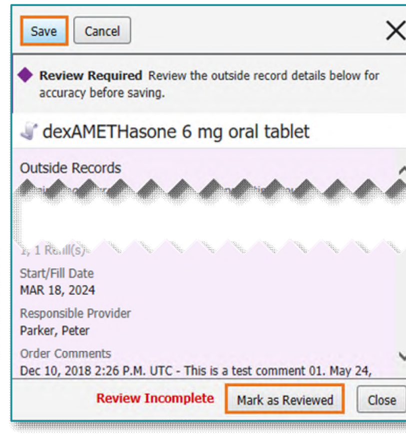

**NOTE: Medications older than six months or medications with an inactive status will not appear for reconciliation review. Click All in the Date Range dropdown or the Inactive dropdown under Status.**

**STEP 3**: The following medication details can be updated by scrolling down:

- Dose
- Route

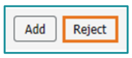


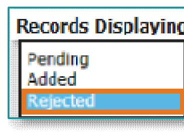
- Frequency
- Duration




**STEP 4:** Click **Save**.

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

**STEP 6:** To dismiss a medication, click the **Reject** button under the Actions column. 

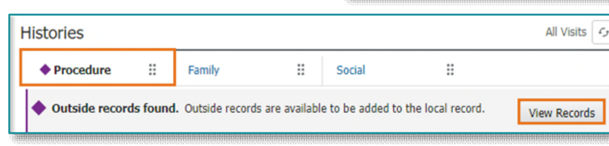

- If the medication was rejected in ***error***, click the dropdown under Records Displaying and select **Rejected**.
- Select the medication and follow **STEPS 3 – 5** above.

**STEP 7:** Click **Mark as Reviewed** when completed.

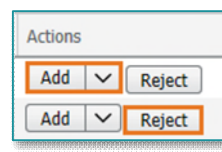
**NOTE:** **Mark as Reviewed is now the Reconcile Action.**

## Procedures


**STEP 1:** Navigate to the **Histories** component within the Workflow MPage.




**STEP 2:** Click the **View Records** button from the top right of the screen.




**STEP 3:** Click the **Add** 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.

- If a procedure was rejected in *error*, click **undo**.

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

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