

Auto-Matching Criteria for Incoming Lab Results Via Lab Importer

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Version 20.16

This function is not available in OP if you utilize eLabs. If you use eLabs, click [here](#).

About

By default, **auto-matching is off for OP Practices**. The information below should be used to prepare your OP for enablement and once complete, your Practice may contact OP Support to have auto-matching turned on. For auto-matching to work, specific settings must be in place, and the user must open the Old Lab Importer (**Tools > Old Lab Importer button**).

Before You Begin

1. Navigate to the Lab Facilities tab of the Diagnostic Tests window. **Clinical tab > More button (Customize group) > Diagnostic Tests button > Lab Facilities tab.**
2. From the facilities list, locate the lab facility from which you're getting results via the Lab Interface and complete the following:
 - a. Ensure that the **On adding a new requisition, create the following items** column in the Lab Facilities settings is set to **Requisition and Order**. See [Add Additional Lab Facilities](#) for more information.
 - b. Ensure that the Test IDs (mandatory) and LOINC Codes (optional for most labs) are set up correctly in OP for the lab.
 1. Contact your lab representative and get a utilization report for your practice for the past 3-5 years. This should contain the lab test IDs and LOINC codes for tests that your practice frequently orders. The contents and formats of a lab utilization report can vary a great deal between reference laboratories. If you need help interpreting what the lab sends you, contact OP Support and provide your utilization report. A sample utilization report might look like this:

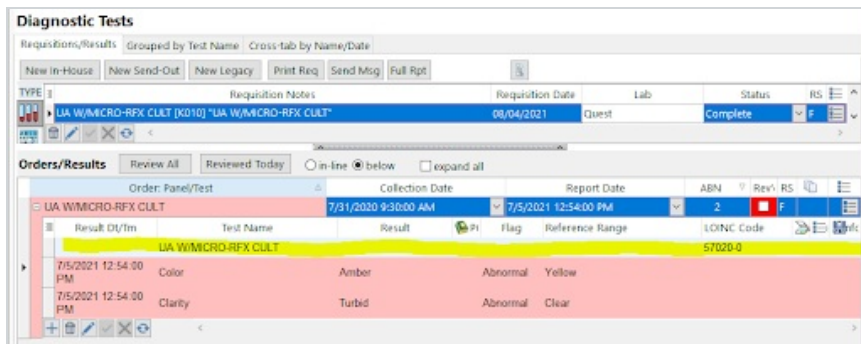
TEST_NAME_LONG	LAB_ISSUED_TEST_ID	LOINC_MOD
URINALYSIS	3440	50556-0
CHOLESTEROL SCREENING	4411	95126-9
CBC W/DIFF	3424	57021-8
COVID-19 FLU AB	4422	95942-9
COVID-19	4419	94558-4
FLU AB	100319	

1. Then, add this data to the Test Name Definitions tab in the Diagnostic Tests window. **Clinical tab > More button (Customize group) > Diagnostic Tests button > Test Name Definitions tab.**
2. □
3.
 - a. You will need to repeat this process for each reference lab you connect with.

For a results-only interface where results are imported into the Tools > Old Lab Importer, OP will auto-match to the existing open Orders based on the below criteria. Any results that do not match the criteria below will remain in the Old Lab Importer to be manually matched by the user. Results that do meet the criteria and are auto-matched are viewable in the Results Received/Reviewed tab of the Clinical Work window and in the Patient Chart.

Criteria for Auto-Matching

1. There is a requisition with a blank Order line in OP.
2. The patient's first name, last name, date of birth, and gender in the incoming HL7 message must match what is in the Basic Information section of the patient's chart in OP.
3. The LOINC or Lab Issued Test ID from OP has to match with LOINC or Test ID in the incoming HL7 message's OBR-4 field.
 - If the result has the Test ID only and OP has the Test ID (matched with HL7) and/or LOINC, the result will be auto-matched by Test ID, assuming other criteria are satisfied.
 - If the result has LOINC only and OP has the Test ID and/or LOINC (matched with HL7), the result will be auto-matched by LOINC, assuming other criteria are satisfied.
 - If the result has both Test ID and LOINC, the result will **only** auto-match if OP has both the Test ID and LOINC matches for that order, assuming other criteria are satisfied.
4. There is one open requisition that exists in the past 30 days which satisfies criteria 2, 3, and 4 from above. Open requisitions are classified as those with the following statuses:
 - Pending
 - Received
 - Reviewed
 - Partial Rec'd
 - Partial Rev'd
 - Partial Inf'd
5. If there is a requisition with blank Order and blank result line in OP, the setting in OP for 'On adding a new requisition, create the following items' is set to "**Requisition, Order, and Result**" and the matching criteria 2, 3, 4, and 5 above are satisfied:
 - The result will auto-match but the user will see a blank Result line for each order in the patient's chart. This is because the matching is done at the Order level.
 - If the Result line is populated with a value in the Result column, then a new order will be created for the auto-matched result.



The screenshot shows the 'Diagnostic Tests' interface. The top section, 'Requisitions/Results', is grouped by Test Name and cross-tabbed by Name/Date. It shows a requisition for 'LIA W/MICRO-RFX CULT [K010]' with a requisition date of 08/04/2021 and a status of 'Complete'. The bottom section, 'Orders/Results', shows a table of results for the same test. The table has columns for Result DU/Im, Test Name, Result, PI, Flag, Reference Range, and LOINC Code. The results are as follows:

Result DU/Im	Test Name	Result	PI	Flag	Reference Range	LOINC Code
7/5/2021 12:54:00 PM	Color	Amber		Abnormal	Yellow	57020.0
7/5/2021 12:54:00 PM	Clarity	Turbid		Abnormal	Clear	

6. If the setting in OP for **On adding a new requisition, create the following items** is set to **Requisition Only**, and the patient and LOINC/Test ID matches, the user has to manually match the first result in the Old Lab Importer, which will create an entry of the Lab issued requisition ID from the HL7 message in OP. Associated incoming results of an Order with a populated Lab-issued requisition ID in OP will auto-match as long as subsequent results have not been already present in the Old Lab Importer.
 - If there are multiple orders in one Requisition and only some orders match:
 - The result will be auto-matched if the matching criteria 2, 3, 4, and 5 above are satisfied for the orders.
 - For the order for which the matching criteria (2, 3, 4, and 5 above) was not satisfied, OP will auto-create a new order with the result and the already present blank order in the chart will remain as is.

If none of the orders in a requisition satisfy the matching criteria (2, 3, 4, and 5 above) then the result will be present in the Old Lab Importer and manual matching is required.

