

Auto-Matching Criteria for Incoming Lab Results Via Unmatched Received Results

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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

OP has implemented a new feature of results auto-matching for the results only lab interfaces where results are coming into the Unmatched Received Results tab. The benefit of this feature is that the results will go straight to the chart (and **Clinical > Received** for the providers to review) instead of the Unmatched Received Results tab where the user had to do manual result matching.

By default, **auto-matching is off for OP Practices**. Please note that, if turned on, the auto-matching will be turned on for **ALL** results only lab interfaces and not just selected lab interfaces.

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:
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.**
 - 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 **Clinical > Unmatched Received Results**:

- OP will auto-match to the existing open Orders based on the below criteria.
- Any results that do not match the criteria below will be viewable in the **Results Received/Reviewed** tab of the **Clinical Work** window and in the **Patient Chart**.
- Results that do meet the criteria will be present in the **Unmatched Received Results** tab and manual matching is required.

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. Recommended setup under **On adding a new requisition, create the following items** column in the **Lab Facilities** settings is set to **Requisition and Order**. Path: **Clinical > More** button (Customize group) **>Diagnostic Tests > Lab Facilities > On adding a new requisition create the following items**.
5. There is one open requisition that exists in the past 30 days which satisfies all previous criteria. Open requisitions are classified as those with the following statuses:
 - Pending
 - Received
 - Reviewed
 - Partial Rec'd
 - Partial Rev'd
 - Partial Inf'd
6. If there is an Requisition with blank Order in OP, assuming all previous criteria is satisfied:
 - The first result will get auto matched to the existing order.
 - Subsequent following results for the same order will be auto matched and will be present in the chart as the separate orders.
7. If there is a **Requisition** with blank Order and blank result line in OP.
 - Assuming all previous is satisfied. then the first result will auto-match to the blank order 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.
 - Subsequent following results for the same order will be auto matched and will be present in the chart as the separate order.
8. 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 must manually match the first result from the **Unmatched Received Results**, which will create an entry of the Lab issued requisition ID 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 **Unmatched Received Results**.
 - If there are multiple orders in one **Requisition** and only some orders match:
 - The result will be auto-matched if the matching criteria 1 through 6 above are satisfied for the orders.
 - For those that do not, 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 (1 through 6,) then the result will be present in the **Unmatched Received Results** and manual matching is required.