

Overview

This document is a step-by-step guide to complete the Labs configuration within your Welkin environment. The following needs be configured:

Step 1: Configuring Designer Portal Step 2: Configuring Admin Portal

welkin

After the above configuration is complete, please provide the following details to your Welkin implementation manager to enable the Labs Integration in Welkin for your practice:

- 1. Tenant name
- 2. Environment name
- 3. API Client ID and Secret
- 4. Welkin UUID of at least one user that is to be registered with Health Gorilla (can be found in **Users** section of Welkin's Admin Portal). If the user is a Doctor, then NPI is also required.

Designer Configuration

- 1. Login to Welkin's Designer Portal
- 2. Select the environment for which you want to configure Labs Integration.
- 3. Click on the **Create Draft** button in the upper right corner to go into *Edit mode*.
- 4. Once the following 4 configurations are done, go to **Change Summary** in the left panel and click **Publish** to push the changes.
- 1. Adding Document Types
- 1.1 Lab Order
 - 1. Go to **Custom Data > Document Types** in the left panel
 - 2. Click on Create Document Type
 - 3. Fill the values as shown in the screenshot below:



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Create Document Type

Title	
Lab Order	E
Name*	
dt_lab_order	Contains PHI
Lower case, numbers, underscore or hyphen (e.g. "risk-score").	
Single Record Multi Record Please ensure "Name" value is same as mentioned here with "underscore"	е

+ Show System Fields

Data Fields

dtf-notes Textarea			
Name*			
dtf-notes			
Lower case, numbers, unde	erscore or hyphen (e.g. "risk-score").		
Type*			
Textarea		~	
Required PHI			
Required PHI	Max length		

+ Add Field

Screenshot 1: Creating 'Lab Order' Document Type

4. Click Save Changes

1.2 Lab Result

- 1. Go to **Custom Data > Document Types** in the left panel
- 2. Click on Create Document Type
- 3. Fill the values as shown in screenshot below:



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Create Document Type

Title				
Lab Result				E
Name*				
dt_lab_result				Contains PHI
Lower case, numbe	ers, undersc ore or h	yphen (e.g. "risk-score	").	
Single Record	Multi Record		Please ensure "Name" value is as mentioned here with "underso	same ore"

+ Show System Fields

Data Fields

dtf-notes Textarea		
Name*		
dtf-notes		
Lower case, numbers, unde	erscore or hyphen (e.g. "risk-score").	
Type*		
Textarea		
Required PHI		
Required PHI	Max length	

+ Add Field

Screenshot 2: Creating 'Lab Result' Document Type

4. Click Save Changes

2. Adding Security Policy

- 1. Go to Access Control > Security Policies in the left panel
- 2. Click on Create Security Policy
- 3. Under General Information tab:
 - a. Give a name to the security policy
 - b. Under Internal Data Types, select Lab Order and Lab Result



- c. Under Document Types, select Lab Order and Lab Result
- 4. Check the Select All boxes under Patient, Internal CDT and Document tabs.
- 5. Click on **Save Changes**

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Create Security Policy		
General Information Encounter Patient Patient Info Calenda	Communication Data Insights Internal CDT	CDT Form Document Dictionary Program
Name*		
sp-health-gorilla	E3	
Lower case, numbers, underscore or hyphen (e.g. "risk-score").		
Internal Data Types		
Lab Order x Lab Result x	Contains PHI	
Data Types		
Select data types	Contains PHI	
Forms		
Select forms	Contains PHI	
Document Types		
Lab Order X Lab Result X	Contains PHI	
Dictionaries		
Select dictionaries		
Programs		
		Cancel Save Changes

Screenshot 3: Creating Security Policy (1/4)

← Back													
Create Secur	rity Polic	у											
General Information	Encounter	Patient	Patient Info	Calendar	Communication	Data	Insights	Internal CDT	CDT	Form	Document	Dictionary	Program
Patient 🗹 Select	t All												
Create													
Read													
✔ Update													
V Delete													

Cancel	Save Changes
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Screenshot 4: Creating Security Policy (2/4)



Create Security Policy

General Information	Encounter	Patient	Patient Info	Calendar	Communication	Data	Insights	Internal CDT	CDT	Form	Document	Dictionary	Program	
Internal Data Ty	pes 🔽 Sele	ect All												
dt-lab-order														+ Show System Fields
Field Name									\checkmark	Read			Read Masked	
dtf-notes									~				\checkmark	
dt-lab-result														+ Show System Fields
Field Name									\checkmark	Read			Read Masked	
dtf-notes									\checkmark					

								Cancel	Save Changes
		Sc	reensho	t 5: Creating	g Secur	ity Polic	y (3/4)		
← Back	ite - De lie								
Create Secur		y							
General Information	Encounter	Patient Patient Info	Calendar Comn	nunication Data Insi	ghts Internal (CDT CDT Forn	n Document Dictionar	y Program	
Documents 🗹	Select All								
Document Type	🔽 Read	Read Details	Read Files	Read Masked	Create	Update	Update Details	Update Files	✓ Delete
dt-lab-order									
dt-lab-result									

Screenshot 6: Creating Security Policy (4/4)

Cancel Save Change

- 6. Go to Access Control > Roles in the left panel
- 7. Create a new role for the user group that will be using the Labs Integration. If such a role is already defined and pre-exists, then open it.
- 8. Under Policies, select the security policy created in steps 1-5.



9. Click on Save Changes

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Edit Role	
Name*	
	E
Lower case, numbers, unde score").	rscore or hyphen (e.g. "risk-
Policies*	
sp-health-gorilla x	Contains PHI
Description	
Enter a description	

Cancel Save Changes

Screenshot 7: Setting security policy in the role

- 3. Configuring Layout
 - 1. Go to **Presentation > Layouts** in the left panel
 - 2. Click on **Documents**
 - 3. Under General Information tab, select the role created in previous section from Roles
 - 4. Click on Save Changes

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← Back		
Edit Layout		
General Information Layout		
Title*		
Documents	E	
Name*		
	E	
Lower case, numbers, underscore of "risk-score").	r hyphen (e.g.	

Screenshot 8: Configuring Layout

Cancel Save Changes

4. Adding Access Point

r-doctor X

- 1. Go to **Presentation > Action Bar**
- 2. Add the "Laboratory" action button to the Visible Action Buttons section.
- 3. Click on Save Changes

well	kin₩		
Change Summary	Action Bar		Action Button Properties
Version History Programs	Available Action Buttons	Visible Action Buttons	Create Action Buttons for quick access to external applications or websites.
Custom Data –		First row	Title
Dictionaries	+ Email	- Laboratory	Laboratory Will be displayed as a tepltin on mouse house
Patient Info	+ SMS		Name*
Data Types	+ Calendar		
Document Types	+ Chat		Lower case, numbers, underscore or hyphen (e.g. "risk-score").
Visual Components –	+ Zoom		Action Button Icon* Action Button Icon* A Laboratory
Charts and Graphs	+ Phone Call		
Data Views Program Summary	+ New SMS		
Relationship View	+ New email		
Presentation –	+ New Phone Call		
Layouts			
Action Bar	+ Add Action		
Access Control – Security Policies			Save Changes

Screenshot 9: Adding Access Point to Patient Profile

5. Enabling Notifications

Please ensure that in the **User Notifications** section, "Send Notification" checkbox is turned on for the TASK CREATED type user notification. This ensures that the user is notified every time a Lab Result is received for the patient.

Task Templates										
	User Notificat	tions								
Custom Events										
Automation									Create User N	lotification
Webhooks	West -	N	Front Colores	5	6	6	e - lucht - l	The all The second states	for a Tanan late	144-1-11-
Encounters –	litte	Name	Event Subtype	Send Email	Send Sms	Send Notification	Send Webhook	Email Template	Sms Template	Wednook
Encounter Templates	CHAT UNREAD MESSAGE	CHAT_UNREAD_MESSAGE	Chat Unread Message					dn_email_template	dn_sms_template	
Encounter Disposition										
Encounter Data View	EMAIL UNREAD MESSAGE	EMAIL_UNREAD_MESSAGE	Email Unread Message					dn_email_template	dn_sms_template	
Care Plan –										
Goal Templates	MESSAGE	SMS_UNREAD_MESSAGE	Sms Unread Message					dn_email_template	dn_sms_template	
Communication –	TACK COMMENT		Taali Caasaaat							
Message Templates	ADDED	TASK_COMMENT_ADDED	Added					dn_email_template	dn_sms_template	
User Notifications –	TACK COMMENT		Task Commont							
User Notification Templates	REMOVED	TASK_COMMENT_REMOVED	Removed					dn_email_template	dn_sms_template	
User Notifications	TASK CREATED	TASK_CREATED	Task Created					dn_email_template	dn_email_template	
Docusign Templates	TASK DELETED	TASK DELETED	Task Deleted					dn email template	dn sms template	
Phone Trees								an_emplace	aaa_template	
Help Page	TASK UPDATED	TASK_UPDATED	Task Updated					dn_email_template	dn_sms_template	
Naming Convention	TASK WATCHER ADDED	TASK_WATCHER_ADDED	Task Watcher Added					dn_email_template	dn_sms_template	

Screenshot 3: Enabling task notification



Admin Configuration

- 1. Creating API Client
 - 1. Login to Welkin's Admin Portal
 - 2. Go to API Clients in the left panel
 - 3. Click on **Create Client** to create API client and save the credentials
 - 4. Open the new API client, scroll to the bottom
 - 5. Select the appropriate environment and click the **Submit** button.
 - 6. Click on the edit icon in the right in the same environment:
 - a. Fill the Role, Primary Role and Policies fields as created in Designer
 - b. Select all the Regions and Territories as applicable
 - 7. Click Save button