Labs Configuration - Customer

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

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.

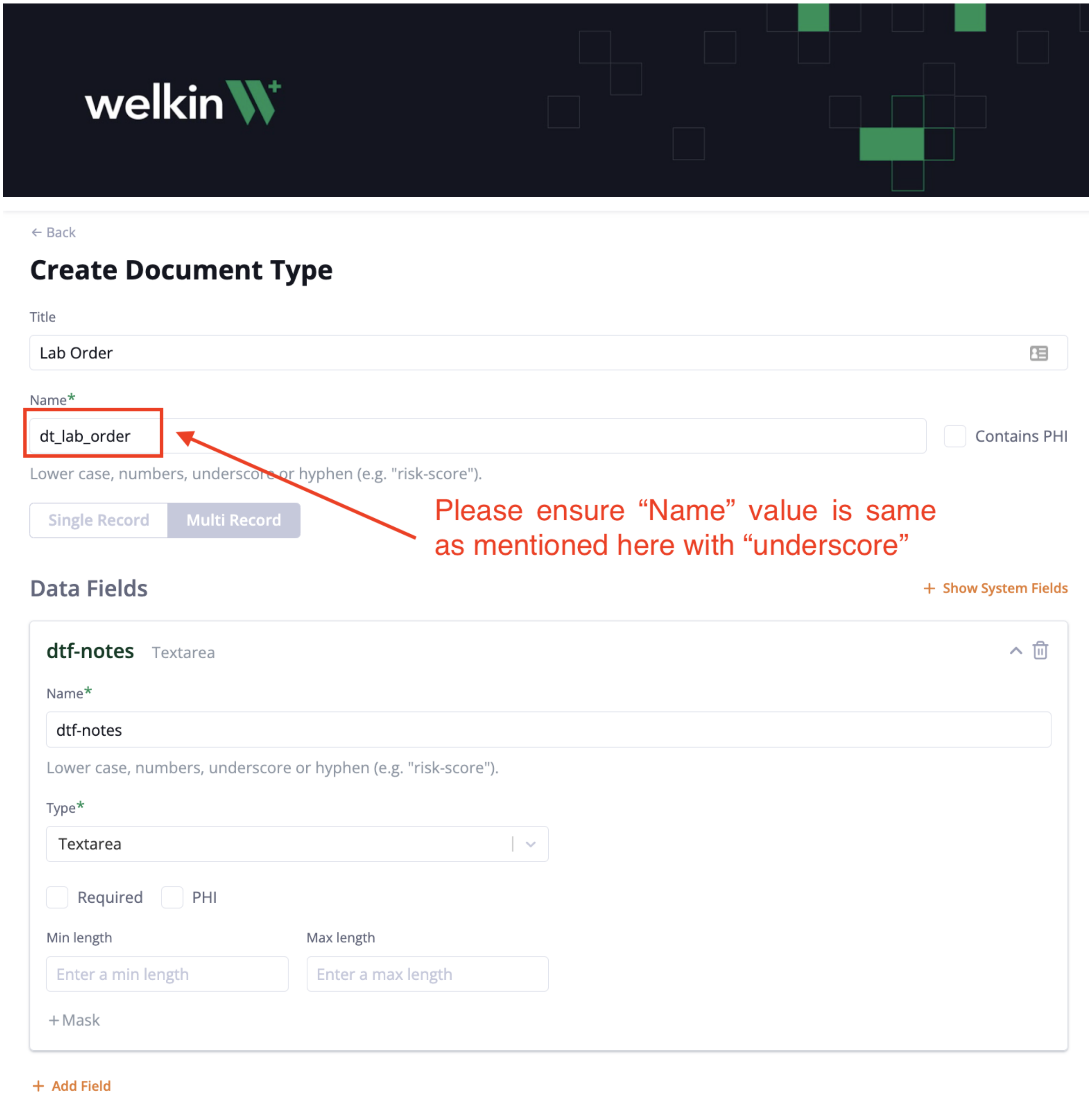
Designer Configuration

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:

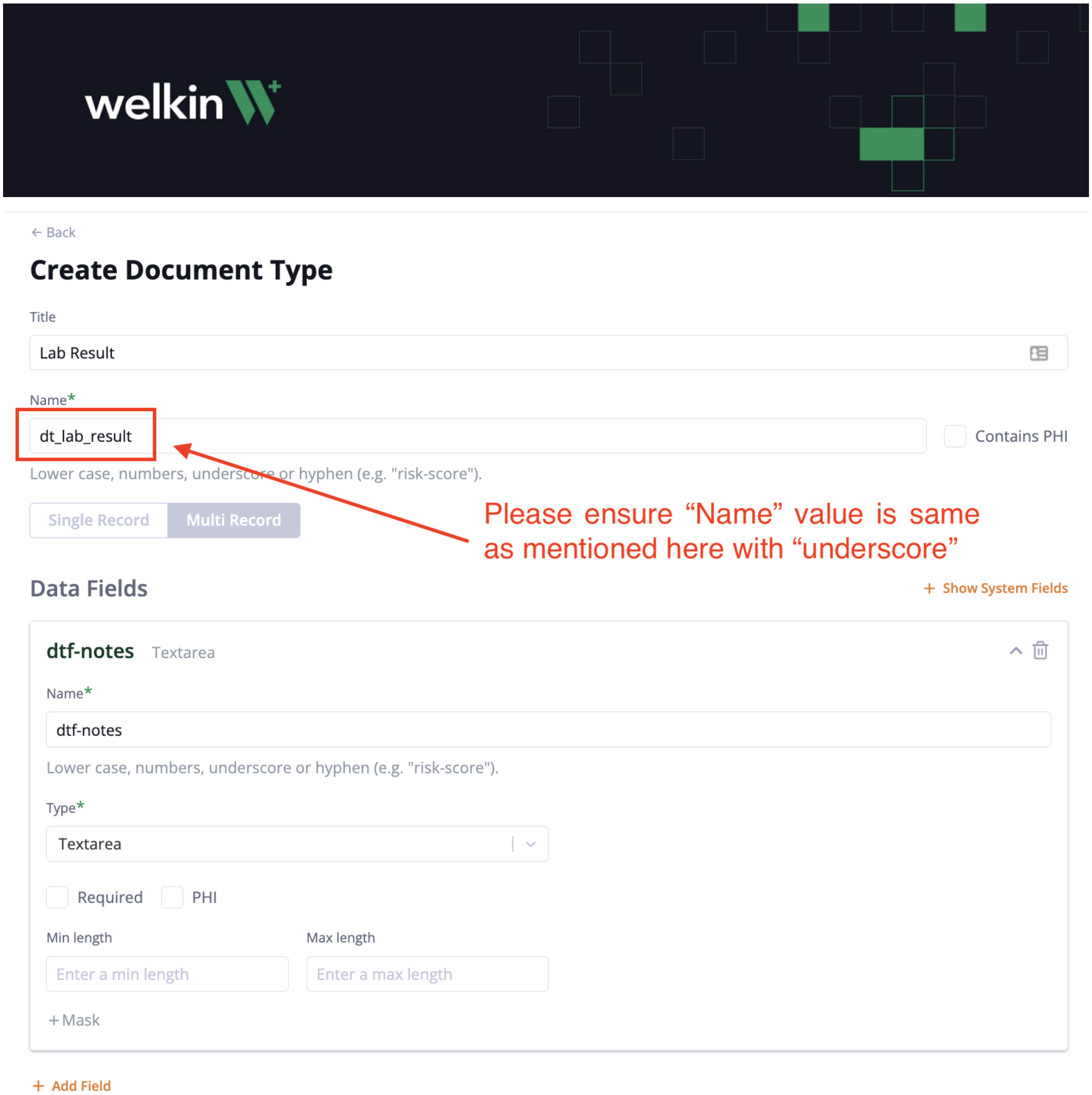


Screenshot 1: *Creating 'Lab Order' Document Type*

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:



Screenshot 2: *Creating ‘Lab Result’ Document Type*

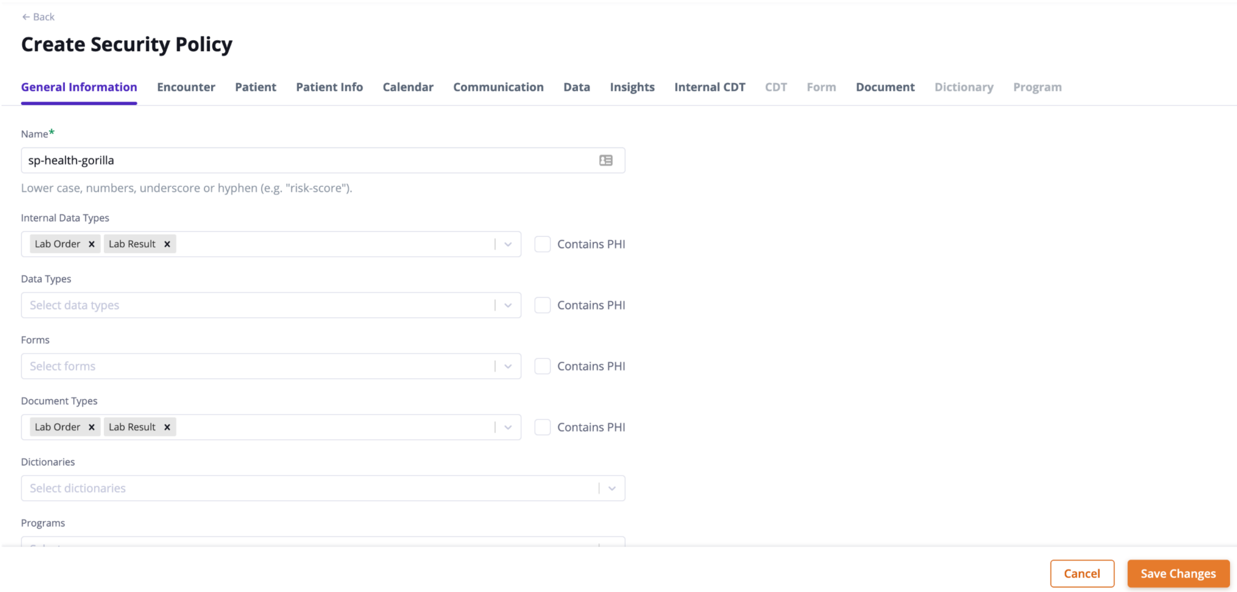
4. Click **Save Changes**

2. Adding Security Policy

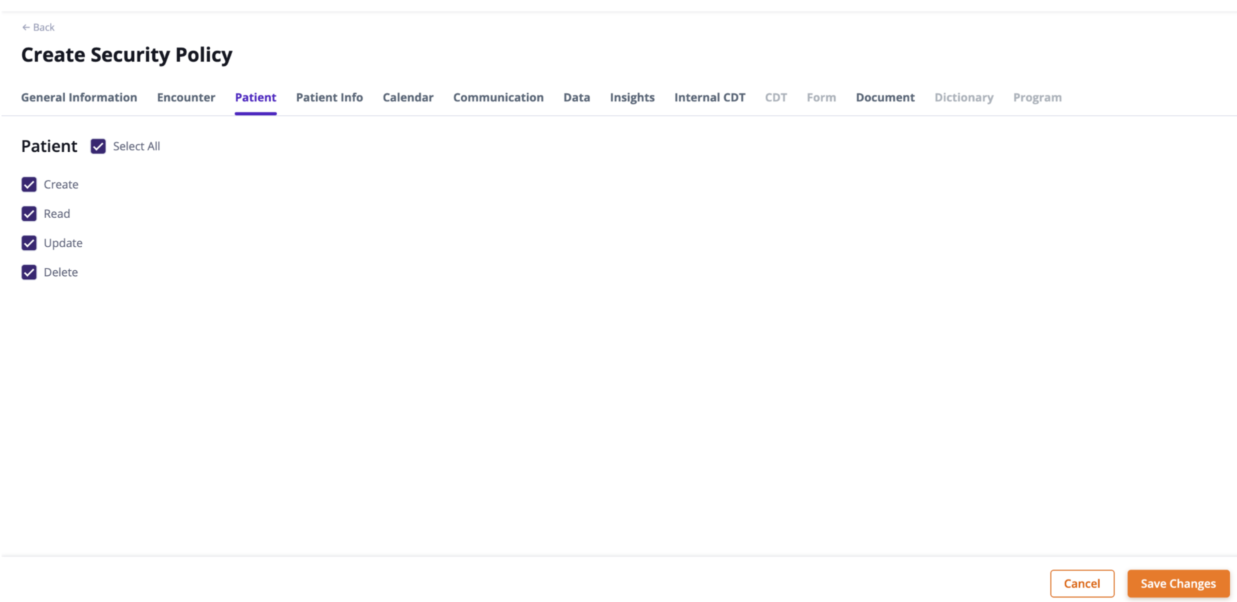
1. Go to **Access Control > Security Policies** in the left panel
2. Click on **Create Security Policy**
3. Under **General Information** tab:
    a. Give a name to the security policy
    b. Under `Internal Data Types`, select *Lab Order* and *Lab Result*

   c. Under `Document Types`, select *Lab Order* and *Lab Result*

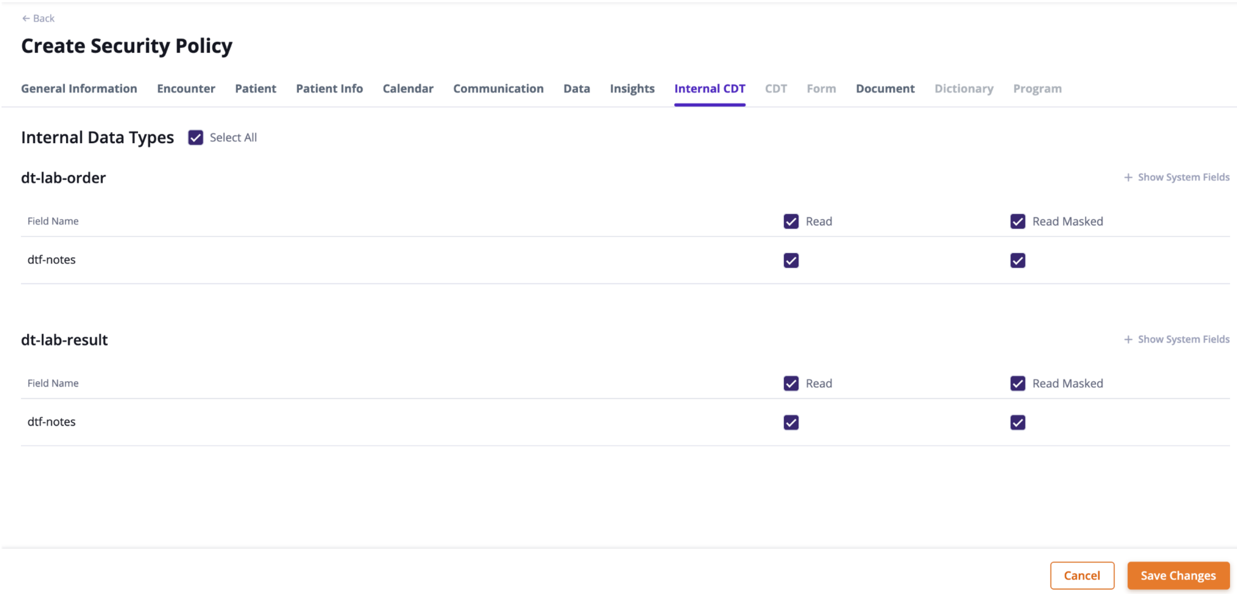
4. Check the `Select All` boxes under **Patient, Internal CDT** and **Document** tabs.
5. Click on **Save Changes**



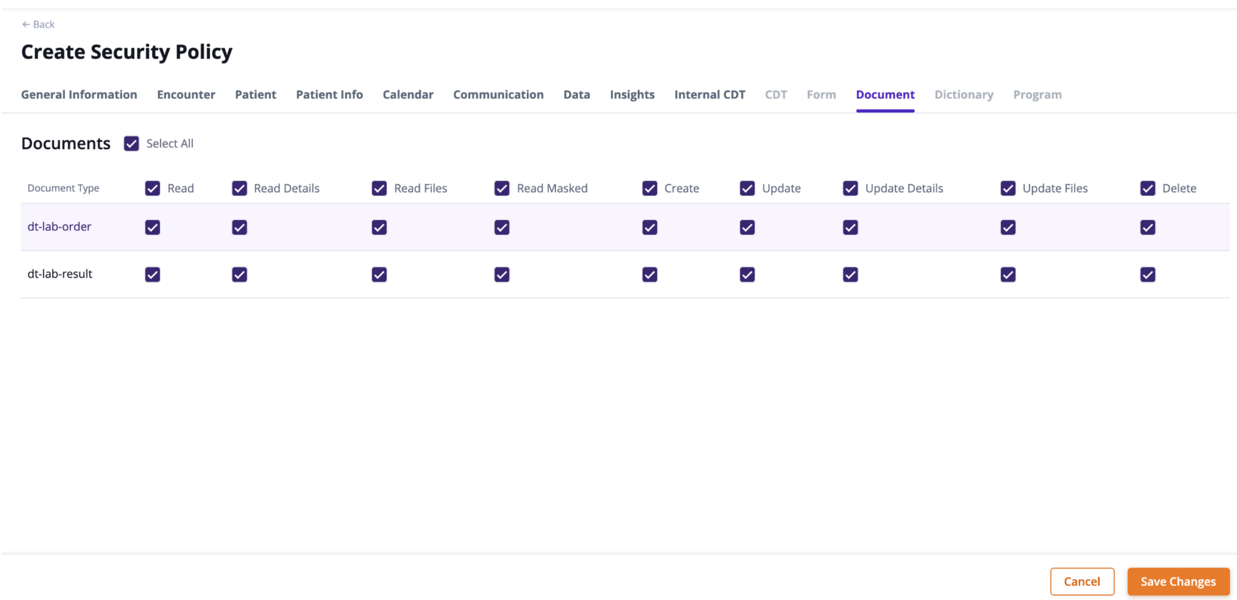
Screenshot 3: *Creating Security Policy (1/4)*



Screenshot 4: *Creating Security Policy (2/4)*



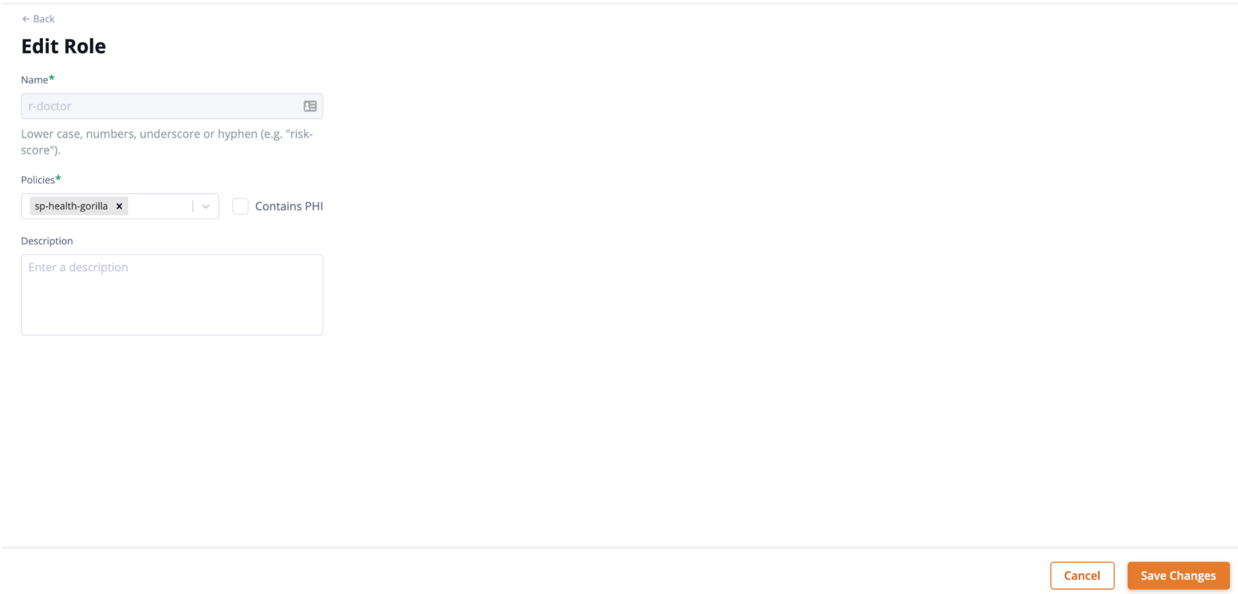
Screenshot 5: *Creating Security Policy (3/4)*



Screenshot 6: *Creating Security Policy (4/4)*

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.

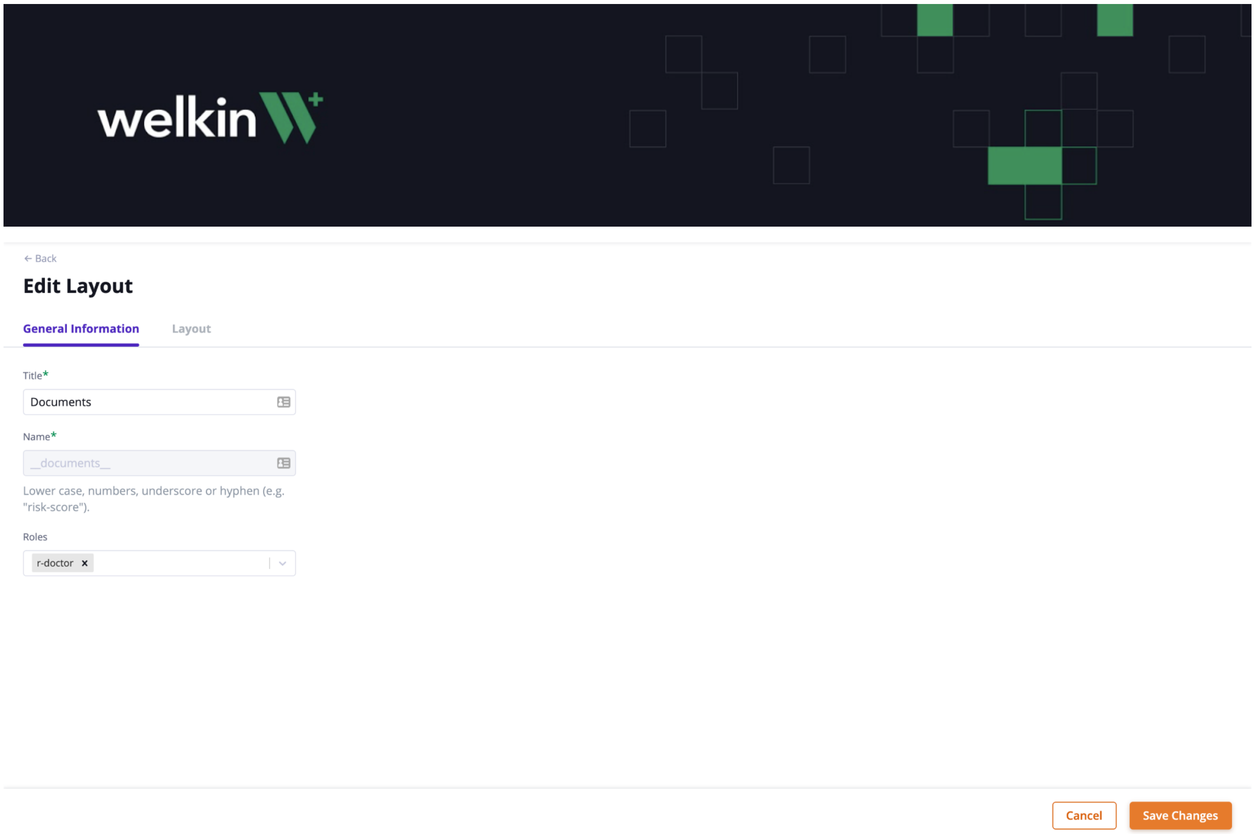
9. Click on **Save Changes**



Screenshot 7: *Setting security policy in the role*

3. Configuring Layout

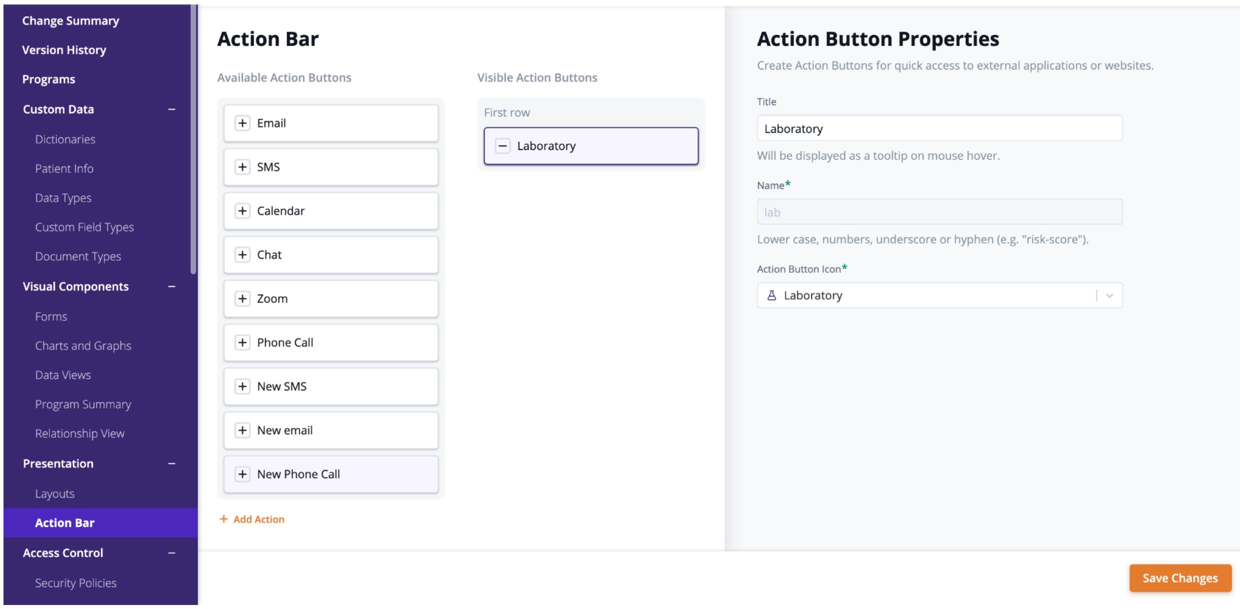
1. Go to **Presentation > Layouts** in the left panel
2. Click on **Documents**
3. Under **General Information** tab, select the role created in previous section from `Roles`
4. Click on **Save Changes**



Screenshot 8: *Configuring Layout*

4. Adding Access Point

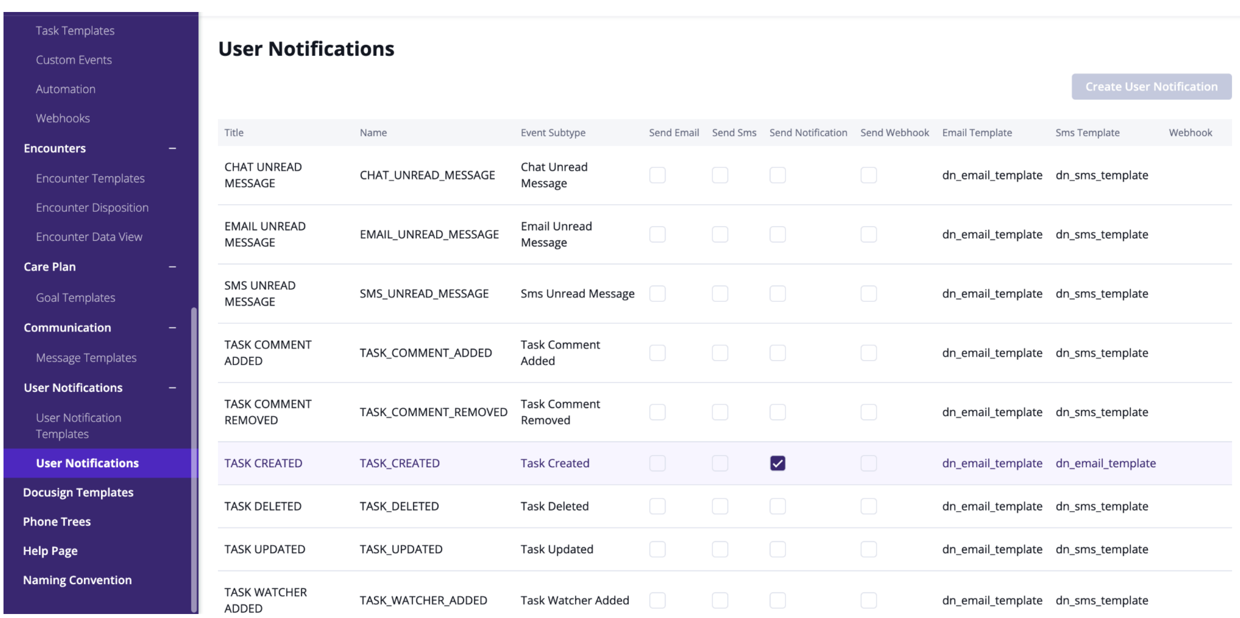
1. Go to **Presentation > Action Bar**
2. Add the “Laboratory” action button to the **Visible Action Buttons** section.
3. Click on **Save Changes**



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.



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