

Exa® PACS/RIS

Feature Summary

Merge and Convert Resources

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What are Provider Resources and System-Generated Providers?

Provider resources are resources that can be associated with a study or linked to a user account. If multiple records exist for one person, they are *merged*.

System-generated providers are names of referring physicians that were attached to a study outside of the Exa platform. They were either received from the modality or were migrated from a previous system. If multiple records exist or if it is necessary to change one into a true resource, they are *converted*.

Identifying Providers and System-Generated Providers

CODE	NAME	NPI#	MARKETING.REP	ADDRESS	PHONE #	FAX #	SPECIALITY	RESOURCE TYPE	MARKET	ACTIVE	SYSTEM
+ [edit] [delete]	eho	Ho, Elvis	1234567890	2217 US Highway 70 East			All	Referring Provider	North	Yes	All
+ [edit] [delete]	fprad1	Perron radiologist, Frederick		2iem contact				Provider-Radiology	North	Yes	
+ [edit] [delete]	fpt	Perron technologist, Frederick		[TO BE FILLED]				Technologist	North	Yes	
+ [edit] [delete]	HCP26TG	Technologist, A radmin		techaddress				Technologist	North	Yes	
+ [edit] [delete]	HCP279RF	JONES, JUDY DO		[SYSTEM PROVIDER CONTACT]				Referring Provider	North	Yes	✓
+ [edit] [delete]	HCP280RF	NELSON, SAMANTHA MD		[SYSTEM PROVIDER CONTACT]				Referring Provider	North	Yes	✓
+ [edit] [delete]	HCP281RF	ORBAN, LEONARD B		[SYSTEM PROVIDER CONTACT]				Referring Provider	North	Yes	✓
+ [edit] [delete]	HCP282RF	C,		[SYSTEM PROVIDER CONTACT]				Referring Provider	North	Yes	✓
+ [edit] [delete]	HCP283RF	CARTER, CAROLINEMD		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓
+ [edit] [delete]	HCP284RF	JAMES HITT,		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓
+ [edit] [delete]	HCP285RF	MIKOLAJCZAK,		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓
+ [edit] [delete]	HCP286RF	Ghosh, Arindam		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓
+ [edit] [delete]	HCP288RF	PA, Ingrid Stabinski		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓
+ [edit] [delete]	HCP289AT	Attorney, Danielle		12345 Main St		(000)000-0012		Attorney	Northeast Region,Southeast,North Germany	Yes	✓
+ [edit] [delete]	HCP28RF	Horning, Andrew M MD	19330102	Rep, Marketing	1787 Constitutional Avenue		('Internal Medicine');	Referring Provider	Northeast Region,Southeast,North Germany	Yes	✓
+ [edit] [delete]	HCP290RF	HORN, KIMMD		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓
+ [edit] [delete]	HCP291RF	Stanley, Kenneth		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓
+ [edit] [delete]	HCP292RF	Calder, James		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓
+ [edit] [delete]	HCP293RF	Test, Test	1487046397	Rep, Marketing	qwe			Referring Provider	Northeast Region,Southeast,North Germany	Yes	✓
+ [edit] [delete]	HCP294RF	WONG, KAITLYN,MD		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓
+ [edit] [delete]	HCP295RF	KANG, JUN, MD		[SYSTEM PROVIDER CONTACT]				Referring Provider	Northeast Region	Yes	✓

Go to **Setup > Providers & Resources > Resources**.

Provider resources have the buttons circled in red on the left, and do not have system provider check marks as shown on the right (note the dropdown list).

Convert System-Generated Providers

1. In the **SYSTEM GENERATED** column, select **Yes** or **All**.
2. Select the system-generated providers that you want to convert.
3. Select **CONVERT SELECTED**.
4. Choose how to convert—almost always select **USE EXISTING**.
5. Choose the provider to convert into.
6. Select **SAVE**.

Tip: it helps to sort by name to group like records together

System provider management

How would you like to convert the selected system providers?

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CANCEL USE EXISTING CONVERT DIRECTLY

5

Select provider

house|

- House, Gregory Md (HCP350RF)
- [To be filled]
- undefined
- House, Dr Gregory (RF522)
- [To be filled]
- undefined
- House, Gregl (RF486)
- [To be filled]
- undefined

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SAVE

Note: Converted system-generated providers are located in the Alt Name tab in the destination resource.

Merge Two Resources

1. Select the resource type (this unlocks the MERGE button).
2. Select the resources that you want to merge.
3. Select **MERGE**.
4. Confirm the referring providers to merge and select **Next**.
5. Search for the destination resource and select **Next**.
6. Select **Confirm**.

The screenshot shows the 'PROVIDERS & RESOURCES' interface. A table lists various providers with columns for CODE, NAME, NPI#, MARKETING.REP, ADDRESS, PHONE #, FAX #, SPECIALITY, RESOURCE TYPE, MARKET, and ACTIVE SYSTEM. A 'MERGE' button is highlighted in the top navigation bar. A dialog box titled 'Referring Provider Merge' is open, showing 'Selected for merge' with two entries: 'HOUSE, DR GREGORY (HCP513RF)' and 'HOUSE, GREGL (HCP481RF)'. The dialog has 'Cancel' and 'Next' buttons.

This screenshot shows the 'Referring Provider Merge' dialog box with the 'Select destination' section. A search bar contains the text 'house', and a dropdown menu shows 'House, Gregory Md (HCP343RF)' as the selected option.

This screenshot shows the 'Referring Provider Merge' dialog box with the 'Summary' section. It lists the 'Source' providers as 'HOUSE, DR GREGORY (HCP513RF)' and 'HOUSE, GREGL (HCP481RF)', and the 'Destination' as 'House, Gregory Md (HCP343RF)'. The dialog has 'Cancel', 'Back', and 'Confirm' buttons.

Note: The merged provider’s contact information is transferred into the destination resource.