

HEALTHCARE IT

## **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** 

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#### 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**.

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Ð	HCP442RF	Hoang, Doctor	1528152329		101 Main Street	(958)666-5656	(958)666-5656		Referring Provider	Northeast Region,Southeast,North Germ	any 🗸	
	HCP301RF	HOANG, THU			SYSTEM PROVIDER CONTAC	r]			Referring Provider		~	
	HCP290RF	HORN, KIMMD			SYSTEM PROVIDER CONTAC	r]			Referring Provider	Northeast Region	~	
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Ē	HCP28RF	Horning, Andrew M MD	19330102	Rep, Marketing	1787 Constitutional Avenue			{'Internal Medicine'	"S Referring Provider	Northeast Region,Southeast,North Germ	any 🗸	
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8	HCP513RF	HOUSE, DR GREGORY			[To be filled]						~	
	HCP481RF	HOUSE, GREGL				/stem	provide	er mana	gement		~	
	HCP343RF	House, Gregory MD			SYSTEM PROVIDE						~	
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**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**.

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		Destination	

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