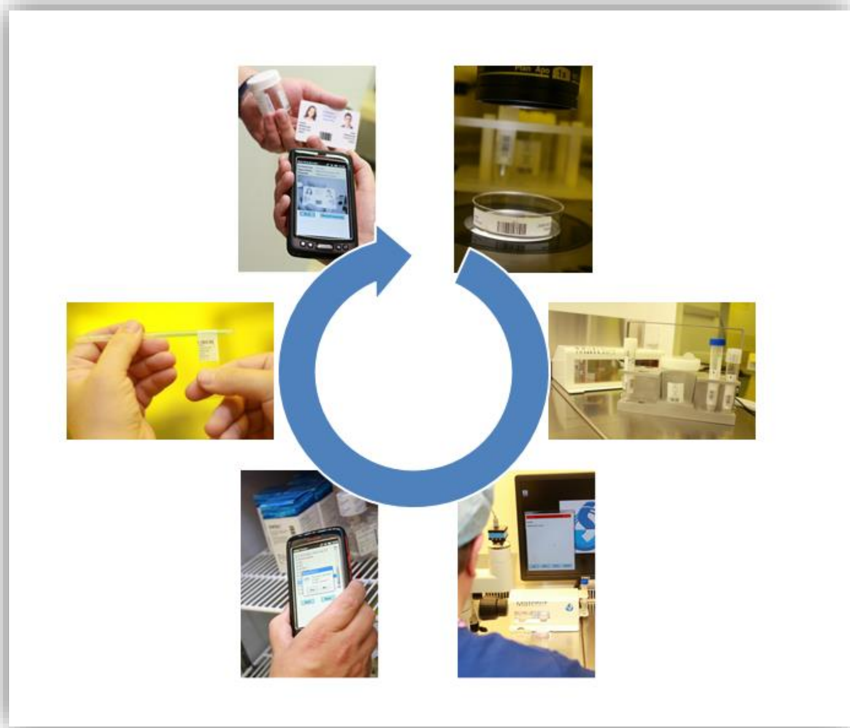
Matcher User Guide



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info@imtinternational.com
www.imtinternational.com
T: +44 (0)1829 771 327

1b Canalside Business Park
Tattenhall, Chester, CH3 9BD
United Kingdom

Contents

info@imtinternational.com
www.imtinternational.com
T: +44 (0)1829 771 327

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Tattenhall, Chester, CH3 9BD
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www.imtinternational.com
T: +44 (0)1829 771 327

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Tattenhall, Chester, CH3 9BD
United Kingdom

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www.imtinternational.com
T: +44 (0)1829 771 327

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Tattenhall, Chester, CH3 9BD
United Kingdom

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www.imtinternational.com
T: +44 (0)1829 771 327

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Tattenhall, Chester, CH3 9BD
United Kingdom

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www.imtinternational.com
T: +44 (0)1829 771 327
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1. Matcher introduction

Matcher provides Quality Management Systems for assisted reproductive medicine (ART) markets. Matcher is accredited to ISO 9001: 2008 (Quality management systems) standards. Specifically created for IVF clinics and donor banks, Matcher assists in preventing error through misidentification of patients and their gametes and embryos. Matcher provides clinics with electronic traceability, recording 'who, what, where and when' at every transfer step. Operating seamlessly throughout the clinic, including cryo stores, theatres and laboratories, Matcher can be utilised by doctors, embryologists, quality managers, nurses and administrative personnel. Matcher is the only witnessing system that takes photos of all procedures, throughout the entire treatment cycle. Photo reports provide an auditable chain of evidence, and additional peace of mind for both staff and patients.

2. Components of the Matcher system

There are four components to the Matcher system, the equipment (hardware), the application, the database and the consumables.

2.1. Hardware

- Benchtop Matcher device(s) containing digital cameras
- Pocket Matcher device(s)
- Printers, PCs or tablets, monitor screens (touchscreen or non-touchscreen)
- Mouse or trackball (depending on user requirements)

2.2. Application (software)

- Crystal Reports
- Matcher fonts
- MS.Net v4
- Camera drivers
- Directory tree
- BCMlib.dll
- Program data
- Soti remote control tool for the handheld device
- Virtual keyboard

2.3. Databases (software)

- Matcher SQL database

2.4. Consumables

- Label sheets (non-cryo) – Provided by Matcher
- Label sheets (cryo) – Provided by Matcher
- Replacement toners – Provided by Matcher upon agreement
- ID cards – Provided by Matcher upon agreement
- ID card dye film – Provided by Matcher upon agreement
- ID card cleaning kits – Provided by Matcher upon agreement

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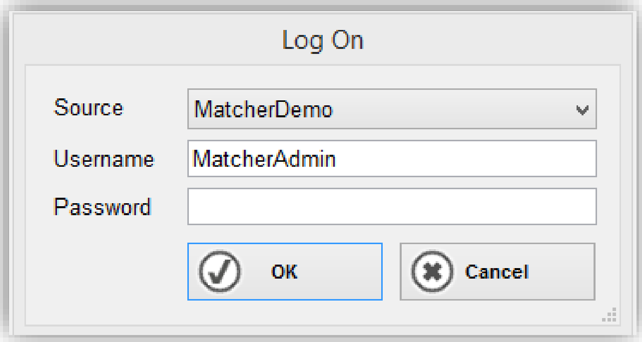
3. Launching application and logging on/off using a PC

- Launch the Matcher application from your desktop by double-clicking the Matcher icon

- Log in using your username and password

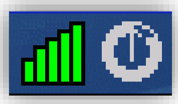


- Select the ‘OK’ button
- The Matcher system will load the patient list.

4. Launching application and logging on/off using a Pocket Matcher

- Press the silver button on the top of your device, after 2-3 seconds your screen will power up.

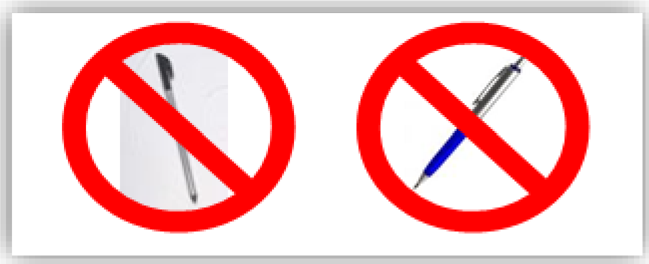
- Ensure that your Pocket Matcher is connected to the WIFI – You will see the WIFI icon displayed next to the power button on screen if it is connected and the authenticated symbol will also be green



- Press the ‘windows’ button at the bottom left of your Pocket Matcher

Please note that you are not able to use a hard-tipped stylus, pen or other object on the touchscreen; it is recommended that you only use your fingertips or a rubber tipped capacitive stylus.

The touchscreen works with and without surgical gloves



- Select the Matcher icon to launch the application

- You can now log on with your username and password and start using the Pocket Matcher
- To log off, select the Exit button on the bottom right hand side

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T: +44 (0)1829 771 327

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Tattenhall, Chester, CH3 9BD
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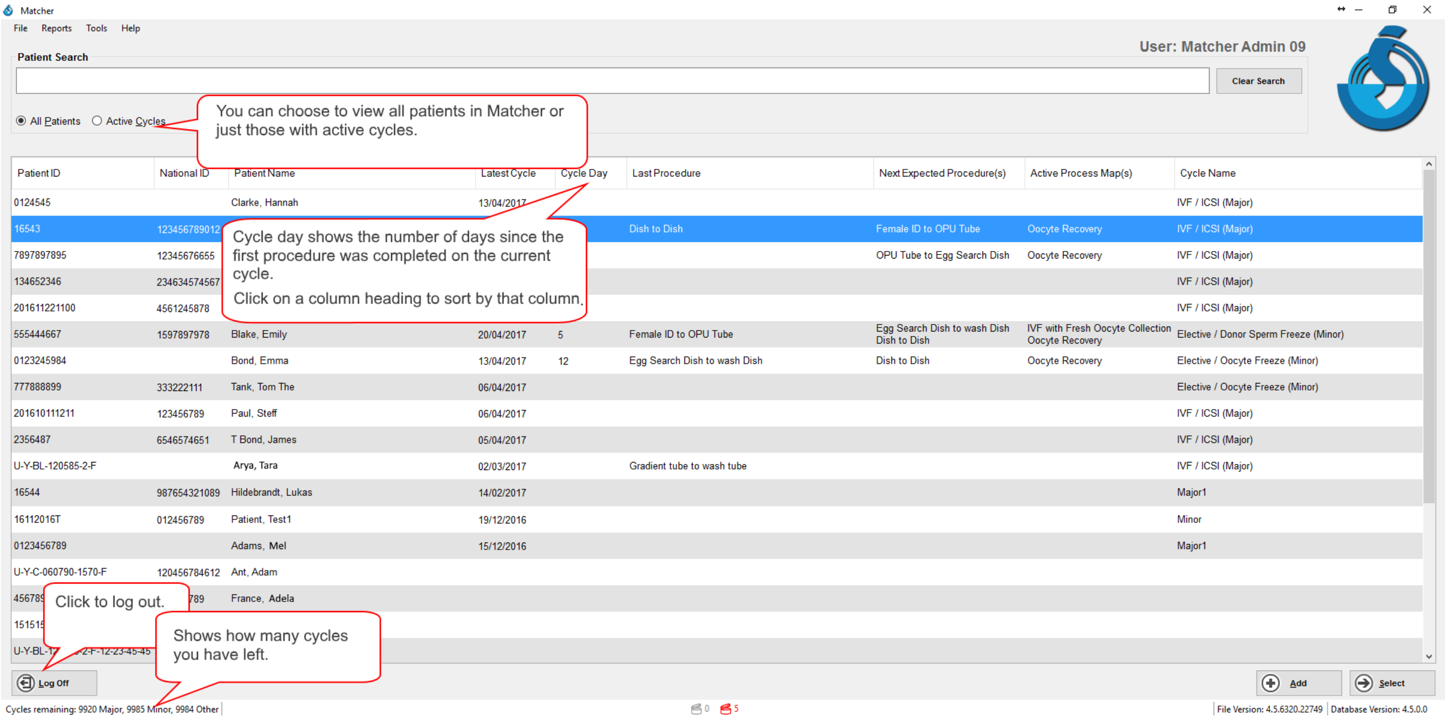
5. The patient list

The patient list is the main screen in the Matcher PC application. It lists all the patients in Matcher.



The list is configurable – you can add and remove different columns, move the columns around and re-order the list. The list is configurable per machine and per Windows user; therefore, you can have a different view in the lab to that in the office and reception area.

5.1. Adding and removing columns in the patient list

- Right-click on the patient list – a menu appears showing columns currently in the patient list ticked (see diagram on next page)
- Click on a ticked column to remove it from the patient list
- Click on an un-ticked column to add it to the patient list
- Click the **Reset To Column Defaults** option if you want to change the columns back to the Matcher default, which is:
    - Patient ID
    - Patient Custom Field (if used)
    - Patient Name
    - Latest Cycle
    - Cycle Day
    - Last Procedure
    - Next Expected Procedure(s)
    - Active Process Map(s)
    - Cycle name

The **Cycle Day** column shows the number of days since the first procedure in the current cycle was completed. If the first procedure in an open cycle was completed yesterday, this column will show ‘1’.

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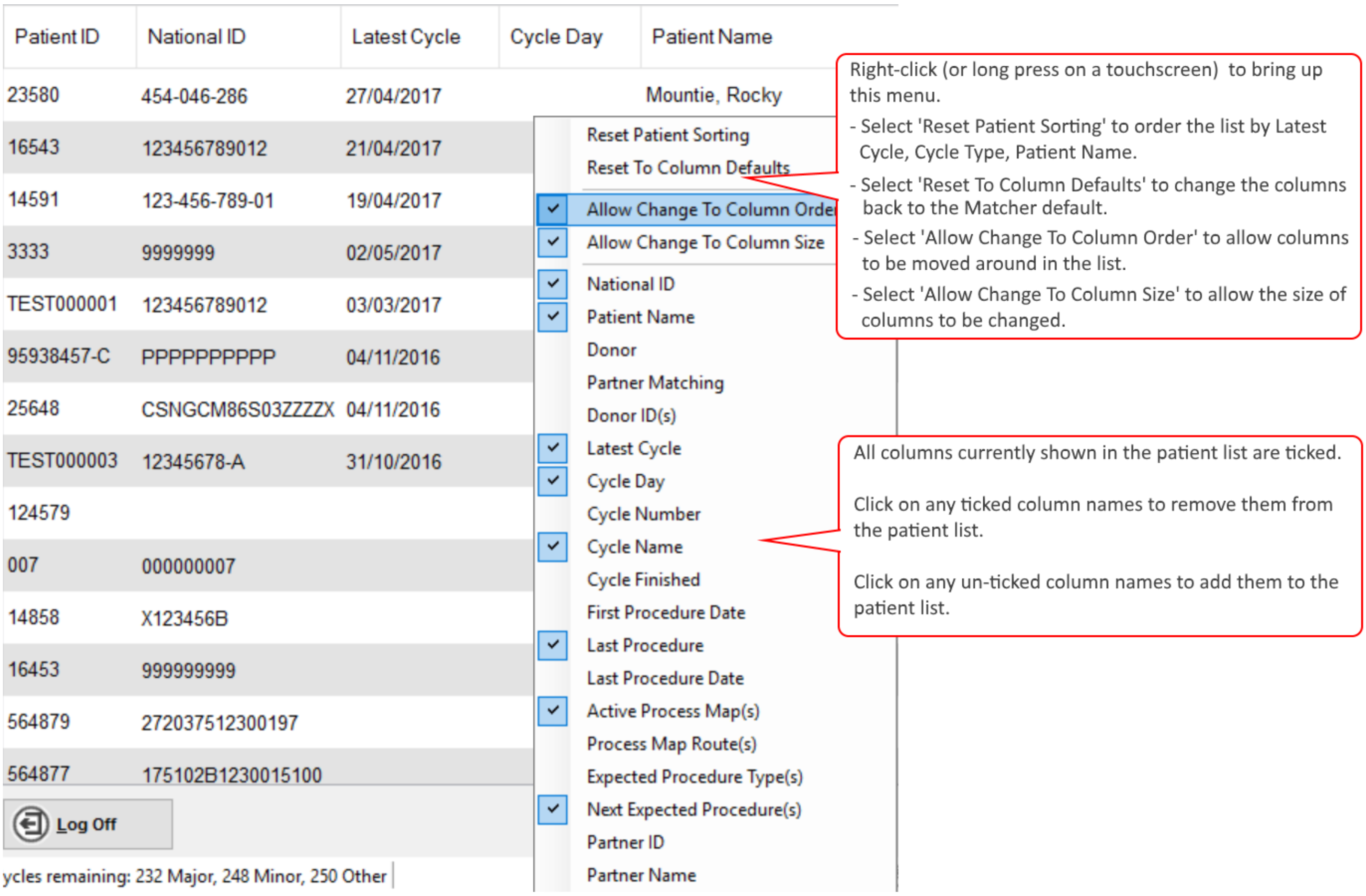
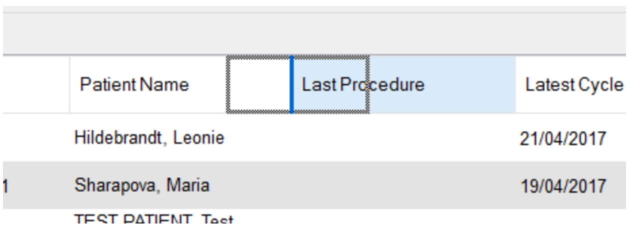


5.2. Moving columns in the patient list

You can move the columns around in the patient list to whichever order you prefer. To do this:

- Right-click anywhere on the patient list and click the **Allow Change To Column Order** option. (If it is already ticked, just click back on to the patient list.)
- Click on the column header that you want to move and drag to the new position.
- A blue line will appear when the column is in position (see below) at which point you can release the mouse button (or your finger on a touchscreen).



5.3. Sorting the patient list

You can sort the patient list by any of the columns. To do this:

- Click on the header of the column you want to sort by (e.g. Patient Name).
- To reverse the sort (e.g. to sort by patient name Z – A) click on the column header again.

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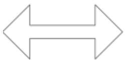
5.4. Re-sizing columns in the patient list

If there is enough space on the patient list, you can re-size some columns in the (such as Patient Name, Last Procedure, Cycle Name…). Whether there is enough space will depend on the number of columns displayed and your screen size. To do this:

- Right-click anywhere on the patient list and click the **Allow Change To Column Size** option. (If it is already ticked, just click back on to the patient list.)
- Move your mouse over the right-hand side of the column you want to resize until your mouse pointer changes to a double arrow like that shown below:



- Click and drag the edge of the column to increase or decrease the size.

Note that it is possible to re-size columns on the patient list using a touchscreen monitor or tablet, but it is more difficult. If you are having issues resizing columns, you may want to temporarily use a mouse whilst you set up the list to your preference.

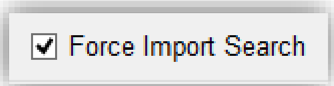
6. Patient registration and editing patient details

Patient registration is completed exclusively on the Matcher PC application. Patient details cannot be performed on the Pocket Matcher. Each patient will have their own unique Patient ID and this will be used to identify the patient when performing clinic procedures. It is impossible to assign an ID to more than one person in the database.

6.1. Importing a patient from a linked database

- On installation of your Matcher system, you will have been linked to your patient or clinic management system if requested
- Navigate to the Patient Search screen (the screen that loads when you log in to Matcher)
- Enter the Patient ID or Patient Name in the Patient search field.
- In some cases, your administrator may have configured the system so that you can use another field to search, such as a National ID, or Passport Number.
- Any results matching your search will appear on the screen as you type.
- If the patient details cannot be located in the Matcher system, the Patient Search field will be highlighted in green and any results shown will be from the linked database.

- In order to just search the linked database and not the Matcher database select the tick box 'Force Import Search'



- Enter the Patient ID or Patient Name (or other field if configured)
- Select the patient by double clicking or select the patient and select the 'Import' button

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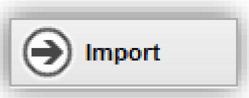
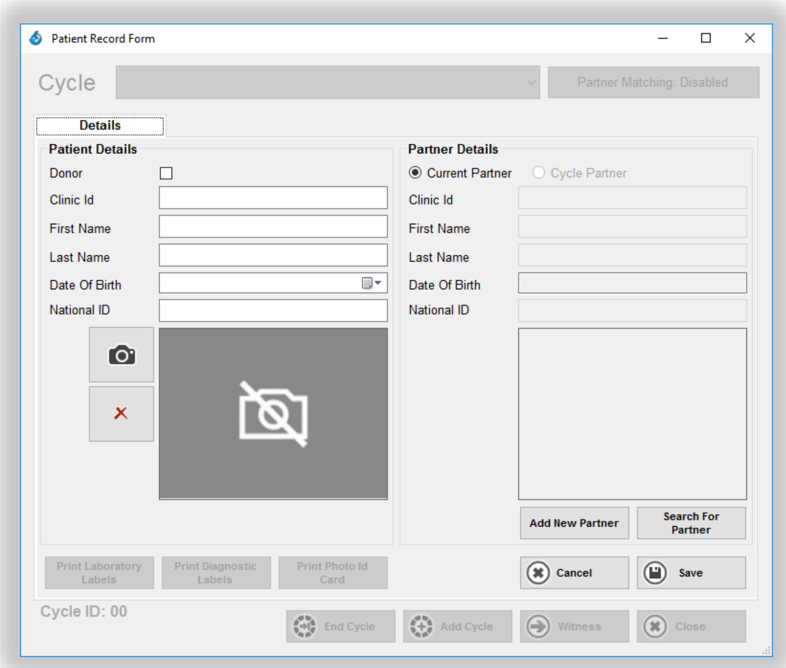


- The patient details will appear
- Select the ‘Save’ button

6.2. Registering a new patient directly in the Matcher database

- On the ‘Patient Search’ page
- Select the ‘Add’ button



- Complete all of the Patient Details (First Name, Last Name are mandatory except if the patient is an anonymous donor)
- Complete the National ID, if this field has been configured for use in your clinic (the field name may be customised differently per clinic – see the Administration User Guide for details).
- To add a photo of the patients please refer to section 5.4
- Select the ‘Save’ button

6.3. Registering a partner

A partner can be a current Partner or a cycle Partner and have separate individual records but are linked to the patient. They can only be linked to one patient at a time. The difference between a current partner and a cycle partner are displayed as follows:

Current Partner – This partner will be the patient’s current linked partner and may be different to a previous partner from a previous cycle

Cycle Partner – This is the patient’s partner for the duration of a specific cycle selected from the dropdown list of cycles at the top of the patient details form. This may be a former partner or the current partner.

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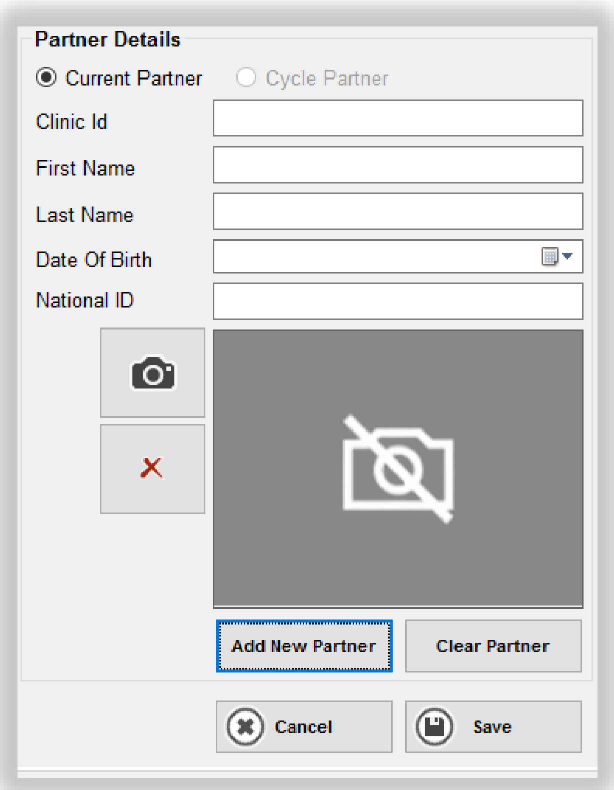
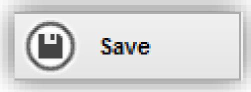
- To add a new partner, select ‘Add New Partner’ button from the Patient details page

- Complete all partner details in the appropriate fields manually (or you can search for a partner if their details are already in the database)

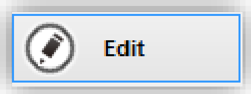


- Select the ‘Save’ button

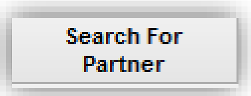


6.4. Searching for a partner already registered in the Matcher system

- Select the ‘Edit’ button on the Patient details page



- Select the ‘Search for Partner’ button



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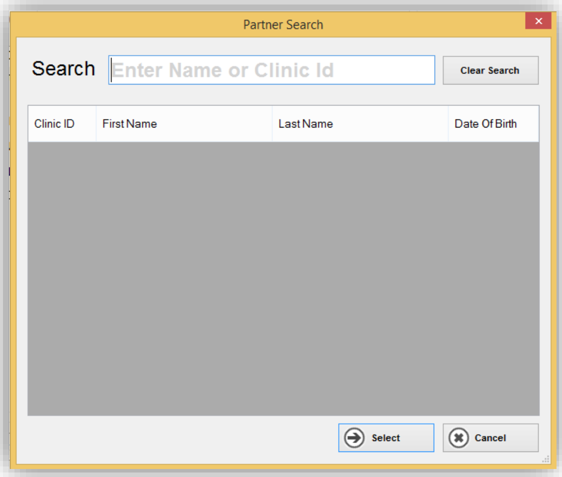
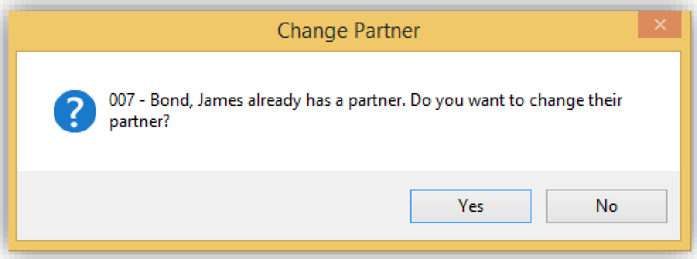


- If the patient does not already have a partner assigned to them, then search for existing details by selecting the Patient ID or Name in the search field (or National ID if configured for your clinic)
- If the Patient already has a partner assigned to them but you want to change the partner, then refer to section 5.8
- If the patient is already allocated to another partner a warning will appear advising 'xxxxx – Name of patient already has a partner. Do you want to change their partner?



- If the patient located is not allocated to another partner, you can select the partner and these will be added to your partner details
- Select the 'Save' button to save changes

6.5. Capturing a patient's photo

- Select the 'Camera' button on the Patient details page as shown below

- The capture photo window will open
- Select the type of overlay required from the 'Overlay' dropdown list to assist with the correct alignment of the patient image
- Select 'Capture' to take photo
- Select 'Cancel' to close the photo, without saving a photo. You can retake the photo or opt not to have a record of the photo

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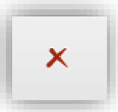
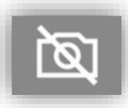
- To remove a photo already taken, select the ‘X’ button



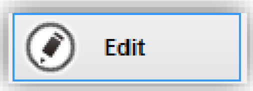
- This will display the following image in the photo space (This image will not appear on the printed ID cards, it will just appear blank)



- Select the ‘Save’ button

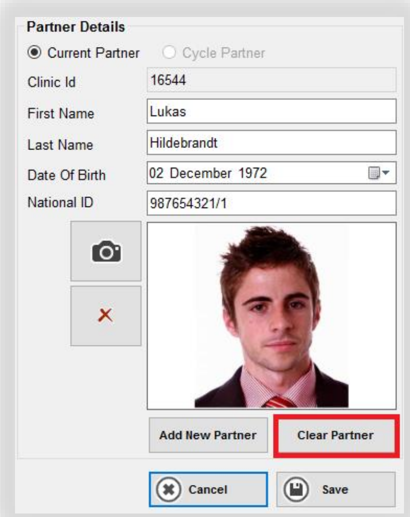
6.6. Editing patient details

- Select the ‘Edit’ button
- This enables the user to edit the patient details, add a new partner and search for a linked partner
- The user is able to edit all fields in Patient and Partner details, except the ‘Clinic ID’ field. This is to avoid Clinic ID information changing after witnessing has already been recorded or material being cryopreserved. If you require the saved Clinic ID information to change, please contact matcher@imtinternational.com or telephone our support team on +44 1829 771 327



6.7. Clearing partner details

- Select the ‘Edit’ button
- Select the ‘Clear Partner’ button



- The ‘Clear Partner’ button will change to the ‘Search for Partner’ button

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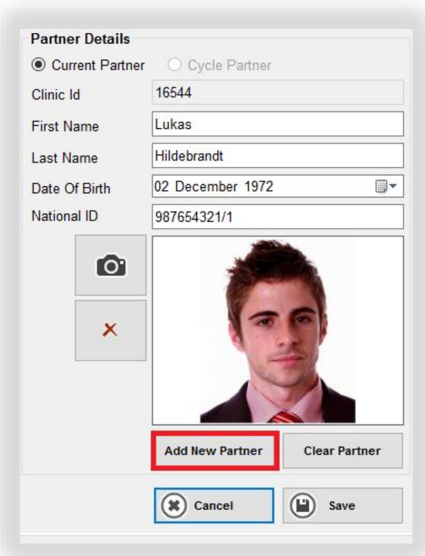
- Select the ‘Save’ button
- Message box appears stating save changes – ‘Do you want to save the changes?’
- Verify the changes by selecting the ‘Yes’ button
- Message box appears stating (Partner Edit) ‘You have removed the partner. Do you want to remove the partner from the active cycle’ (if cycle is selected)
- If you select the ‘Yes’ button it will remove the partner from the cycle and any future cycles
- If you select the ‘No’ button, the partner will remain in the active cycle and their details will still be displayed until a new cycle is created

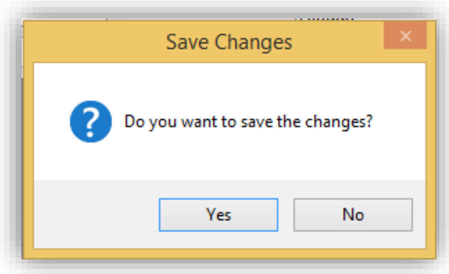
Please note that if you remove a partner from an active cycle, their details will be removed from the patient records but will not end the active cycle.

6.8. Changing partner details

- Select the ‘Edit Details’ button
- Select ‘Add New Partner’ button



- Complete all the partner details fields
- Select the ‘Save’ button
- A pop up window (Save Changes) will be displayed asking ‘Do you want to save the changes?’



- Select the ‘Yes’ button
- If there is a current cycle - a pop up window will be displayed (Partner Edit) advising ‘You have changed the Partner. Do you want to update the partner of the active cycle?’

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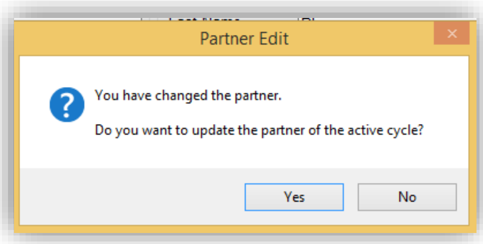

- Select the ‘Yes’ button
- If there is no cycle, the changes will be saved

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7. Donor relationship management

7.1. Donor / recipient relationship – overview

Donors can either be patients specifically recruited as a donor (e.g. anonymous sperm donor) or they can be linked patients who are also designated as a donor (e.g. altruistic egg sharing). Designating a patient as a donor will add them to the 'donor list' within the Matcher system and they will therefore be available for other prospective recipients.

Please note that linking donors to specific cycles means that if you have subsequent cycles, you will need to re-add those donor details to future cycles as the donor details will not be carried over to other cycles automatically.

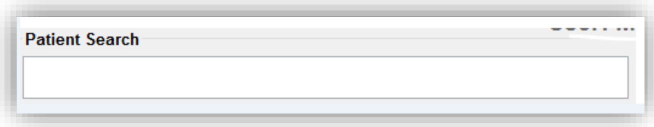
As a donor, they will only be matched for specific procedures and their barcode will not be usable across all of the patient procedures.

Donors can also be linked to multiple patients although they are only allowed to have a maximum of one donor type. Partners can only be linked to one patient at a time.

Links to donors can be broken during an active cycle, however, once the cycle has ended the donor is permanently recorded against the recipient.

7.2. Identifying a registered patient as a donor

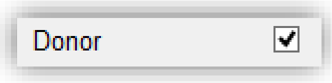
- Navigate to the 'Reports' menu and select 'Donor List Report'
- Enter the report parameters and select 'OK'
- This will provide the user with a list of donors
- Search by Patient ID or Patient name



- Select the patient when found, single click and select 'Select' or double click on Patient
- This will open the 'Patient Details' page, Patients who are identified as donors will have the 'Donor' box ticked

7.3. Registering a new patient as a donor

- After following the steps for adding a new patient in section 5.2
- Select the 'Donor' tick box in the top left of the patient details form (as shown)



- Select the 'Save' button, the details will be added to the 'Donor List Report'
- To review the donor list, go to reports in the Matcher menu and select 'Donor list report'
- Enter the report parameters and select 'OK'

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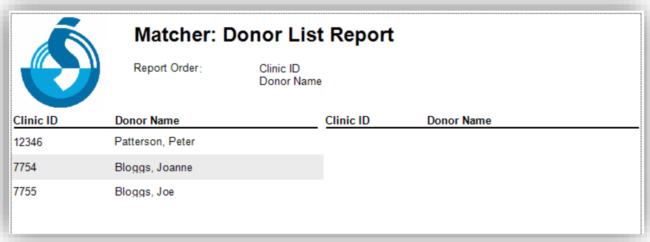


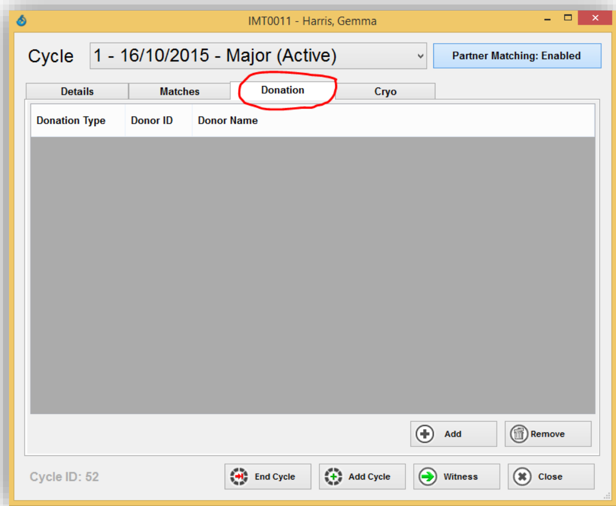
Matcher: Donor List Report

Report Order: Clinic ID, Donor Name

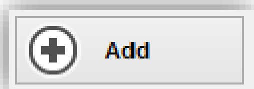
Clinic ID	Donor Name	Clinic ID	Donor Name
12346	Patterson, Peter		
7754	Bloggs, Joanne		
7755	Bloggs, Joe		

6.4. Assigning a donor to a recipient

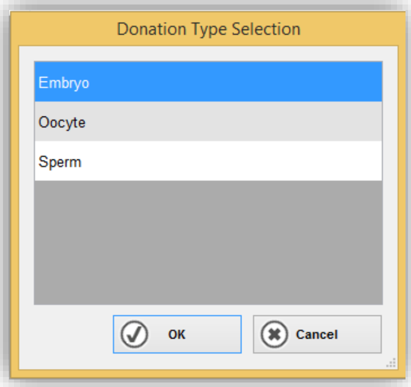
- Navigate to the ‘Donation’ tab on the Patient Details page



- Select the ‘Add’ button



- Select the ‘Donation Type Selection’ from the configurable list and click ‘OK’



- Search for the donor patient either by the Patient ID or Patient Name.

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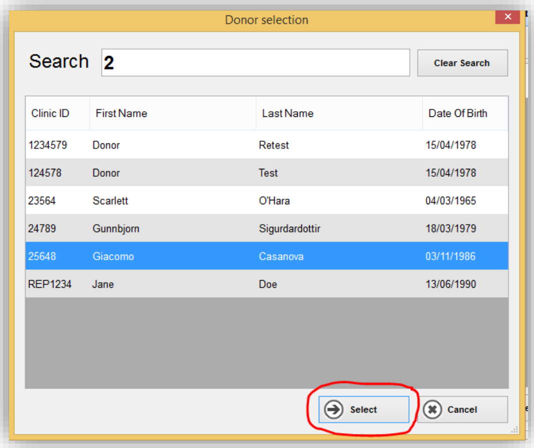
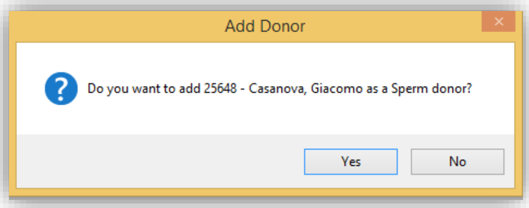
- Once highlighted, select the ‘Select’ button



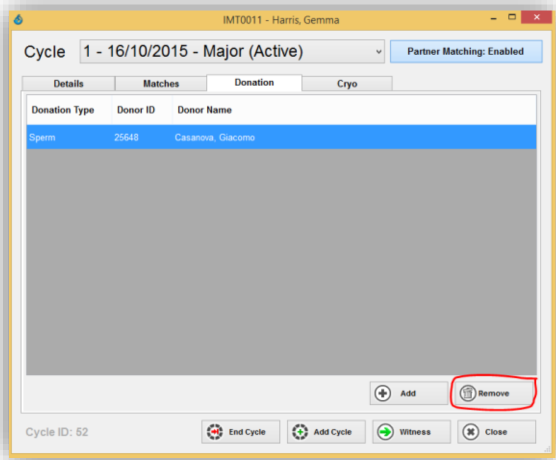
- A pop up window will be displayed asking you to confirm you want to ‘Add Donor’ as a ‘Donation type Selection’



- Select the ‘Yes’ button
- The Donor will be added to the Patient record

7.5. Unlinking a donor from a recipient

- Select the ‘Donation’ tab from the Patient Details page
- Select the donor from the ‘Donation List’
- Select the ‘Remove’ button



- A pop up window will be displayed (Remove Donor) asking ‘Do you want to remove ‘Patient details’ as a ‘Donation Type’ Donor from this Patient’?
- Select the ‘Yes’ button
- Select the ‘Close’ button to return to the ‘Patient Search’ screen

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8. Cycle management

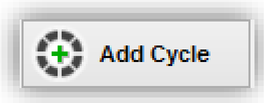
8.1. Patient cycles – overview

To be able to match procedures you will need to activate a ‘patient cycle’ for this patient. The following cycle types are available:

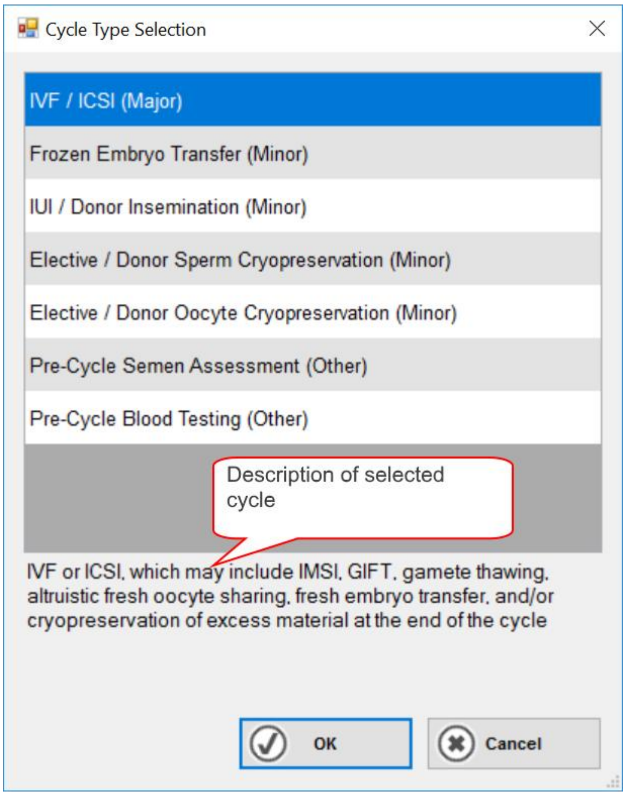
- IVF / ICSI (Major)
- Frozen Embryo Transfer (Minor)
- IUI / Donor Insemination (Minor)
- Elective / Donor Sperm Cryopreservation (Minor)
- Elective / Donor Oocyte Cryopreservation (Minor)
- Pre-Cycle Sperm Assessment (Other)
- Pre-Cycle Blood Testing (Other)

8.2. Adding cycles for a patient

- On the patient details page, select ‘Add Cycle’



- Select the appropriate Cycle Type



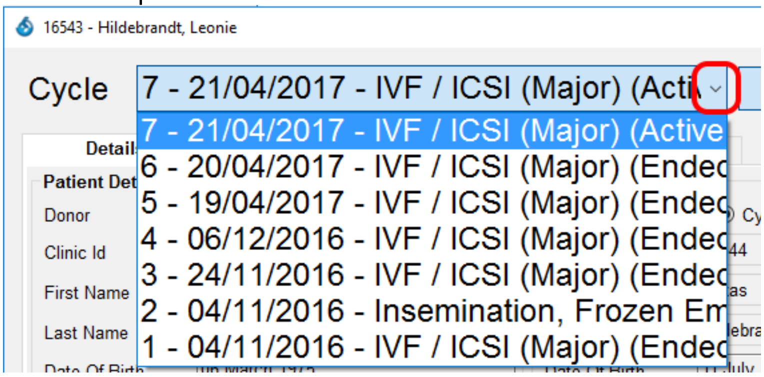
- Click **OK**
- A message box will be displayed asking ‘Do you want to add a new cycle? This will end any active cycles.’
- Click **Yes**

- The cycle number will now be denoted and become active and the number of remaining cycles will be reduced by one.

Please note that if you have no cycles remaining in the system, you will be unable to add new patient cycles and witnessing cannot be performed. Please therefore ensure you re-order your cycles in advance of them running out.

8.3. Viewing existing cycles for a patient

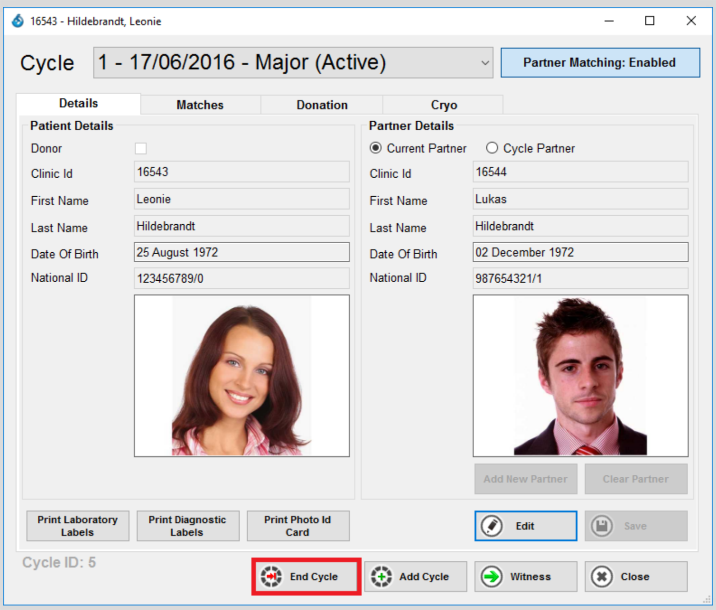
- Navigate to the ‘Patient details’ screen
- Next to the ‘Cycle’ field at the top of the screen there is a drop-down menu detailing all cycles carried out for that patient



- By selecting an existing cycle from the list, you can view the matches, donation and cryo information for that patient in the selected cycle

8.4. Ending cycles

- Navigate to the ‘Patient details’ screen



- Select the ‘End Cycle’ button
- A pop up window will be displayed asking ‘Do you want to end this cycle?’

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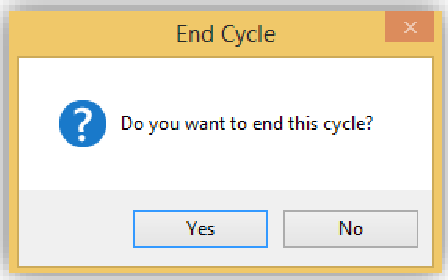
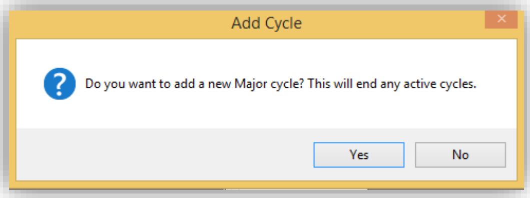


- Select ‘Yes’ to end the cycle or select ‘No’ to return to the patient details
- Adding a new cycle to a patient who already has an active cycle will automatically end the active cycle
- Select the ‘Add Cycle’ button, a pop up window will be displayed



- Select ‘Yes’ this will end the active cycle and add a further cycle

8.5. Cycle inactivity time out

- Cycles will automatically end after a pre-set period of time. This setting is configurable and details of how to change this can be found in the user system administration Guide section – Cycle Management Settings.

8.6. Cycle auditing

- A summary of cycle usage can be viewed in the ‘Cycle Licence Management’ which can be found in the Tools menu. The summary details cycles used, cycles enabled and cycles remaining.

- The remaining cycles for the clinics are also displayed in the status bar on the patient search page. This will show the current number of Major, Minor and Other cycles remaining in the system.

8.7. Ordering additional cycle licences for a clinic

- Upon ordering cycles via email, Matcher will send you a file containing additional cycles
- Save the licence file to a known location on your share drive
- Navigate to ‘Cycle Licence Management’ from ‘Tools’
- Select ‘Add New Cycle Licence’ on the Cycle Summary Page

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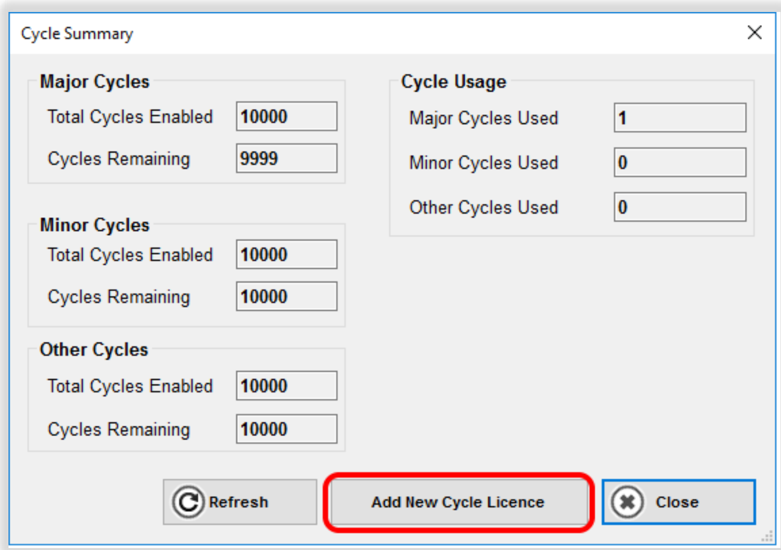
Electronic Witnessing



- The ‘Select Licence File’ window will be displayed
- Select the saved file in the share drive
- Select ‘Open’
- The cycles will be allocated to the clinic
- Select ‘Refresh’
- The cycles will be updated and will reflect in the Cycles remaining field
- Select ‘Close’

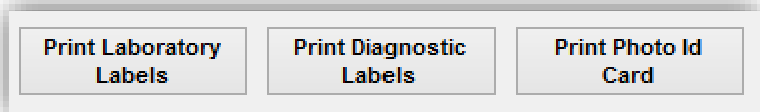
9. Printing ID cards

9.1. The ID card printer

A specialised ID card printer is required to print the patient ID cards, this is connected via a USB or network to your computer. To print the ID cards, please go to section 8.2. You will need to ensure the printer is added to your printer library in the control panel of your PC.

9.2. Printing an ID card

- Navigate to the patient details page and select the ‘Print Photo ID Card’ button



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- A print preview of the Card will be displayed, the following example illustrates a patient who has a linked partner, and both of their details will be printed.

- If the selected patient does not have a partner only their details will appear on the ID cards
- Donor details will not be displayed on a patient photo ID card, to maintain anonymity
- Where the National ID field has been configured for use at your clinic, this can also be printed on the ID card as shown in the above example. See Section 21.3 for further information.
- To Print the ID card, select the print icon and the relevant printer from the printer list

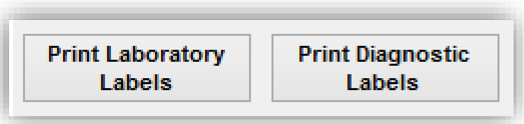
10. Printing labels

10.1. The label printer

It is recommended that you have a dedicated printer for Matcher labels, this will ensure you have label sheets loaded in the printer for convenience and will prevent other clinic documents being printed onto label sheets by accident. A back up printer is also recommended; this may be an existing printer in the clinic.

10.2. Printing laboratory & diagnostic Labels

- Ensure your labels are set up in ‘Tools’ and ‘Label Report’
- To set up a default label for each laboratory & diagnostic label type, highlight the report and select the ‘Set as Default Label’ button
- Ensure you have placed the A4/legal Size LBL016 sheets into your printer
- Navigate to the patient details page
- Select ‘Print Laboratory Labels’ or Diagnostic Labels’ (as displayed in the diagram below)



A print review will be displayed showing a preview of the Laboratory Labels

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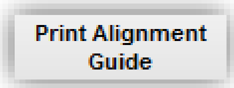
- Select the Print icon and the designated printer

- Select the 'Print' button
- The Labels will be printed on A4 label sheets (ref: LBL016)

10.3. Alignment printing

- Navigate to the 'Label Alignment' in 'Tools'
- Select the 'Label report' from the drop down menu
- Ensure the horizontal and vertical settings are set to the correct settings as per the label alignment guide
- You can make adjustments to the horizontal and vertical settings by selecting the 'Move by' or 'Set to' radio button and selecting the 'Horizontal and Vertical Adjustment fields'
- Select the 'Set Adjustment' button this will save your changes
- Select the 'Print Alignment Guide' button
- The Printer pop up window will be displayed
- Select the designated printer and select the 'OK' button



- A Matcher print alignment guide for Label 016 – diagnostic and lab labels are shown on the next page.

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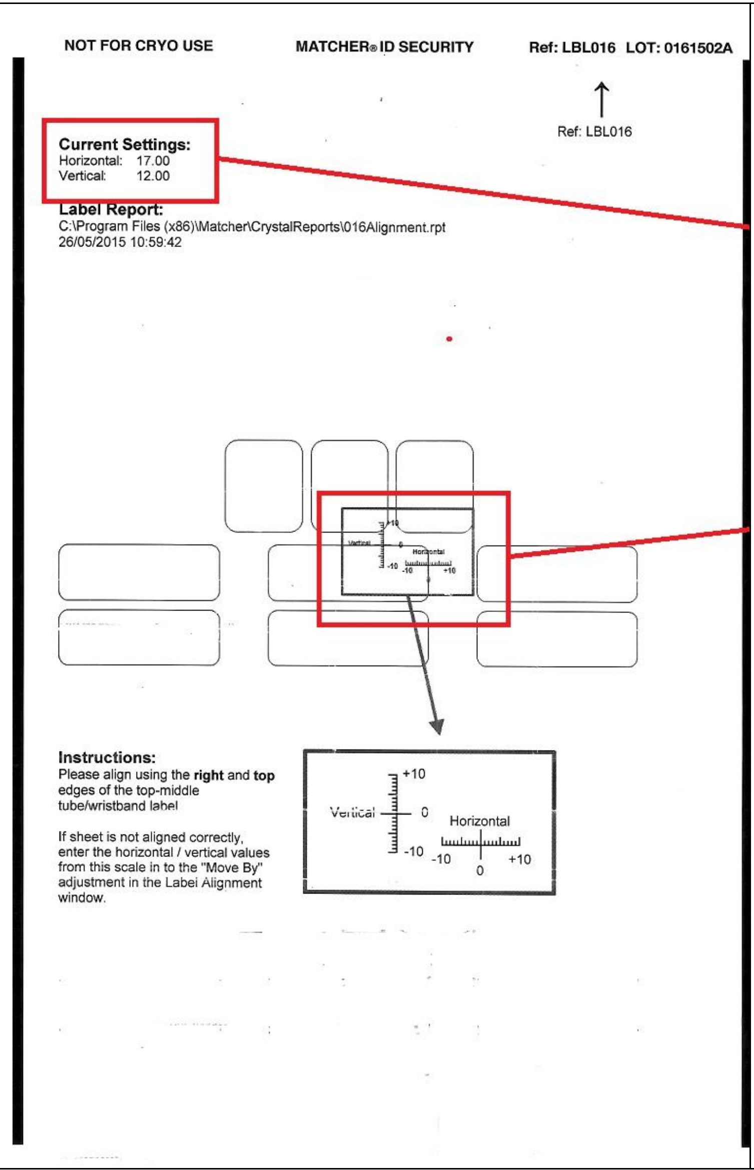

Current Settings will display the settings which are currently set for the labels, this will help to align the labels on your printer.

Ensure the vertical and horizontal lines match up to the end of your labels, you can adjust the settings by using the markers on the scale. For example if the vertical scale was out by 2 on the scale, you can **move by** vertical +2.00, select set adjustment which will make the vertical scale set to 14.00. If you want to move the vertical scale by -2.00 you move by -2.00 to take you back to 12.00.

10.4. Label adjustment settings

There are two ways in which you can adjust the label printing guides, move by or set to. Here we explain the differences in these radio buttons.

- Move By

'Move by' will move the horizontal and vertical line by an amount you have set in mm, therefore when you use your current settings i.e. 'Horizontal' 19.5000 and you add a 'Move By' Horizontal setting to 2.00 and select the 'Set Adjustment' button, your new Horizontal setting will be 21.5000

- Set To

'Set to' will set your horizontal and vertical line to the amount you have set in mm in this field. The current settings fields are not changeable in the Label Alignment screen as they are set in the Label Reports screen.

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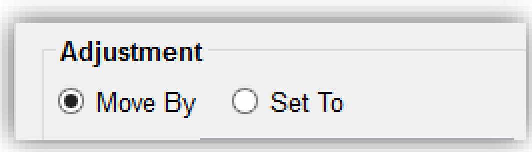

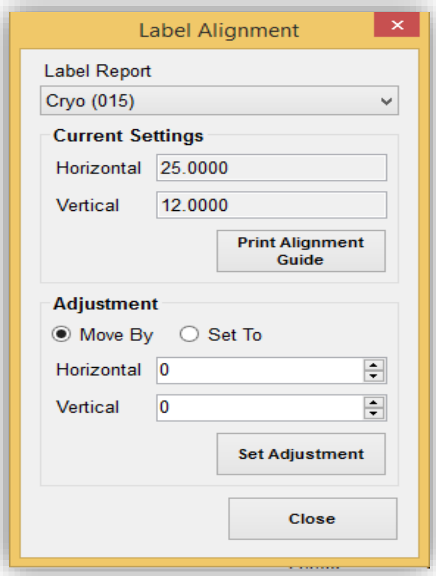

10.5. Label sheet types

There are various label sheets used for different purposes throughout the clinic. These are

- Laboratory labels
- Diagnostic labels
- Cryo labels
- Non cryo labels

Each section will give you details of each of these labels and what they may be used for.

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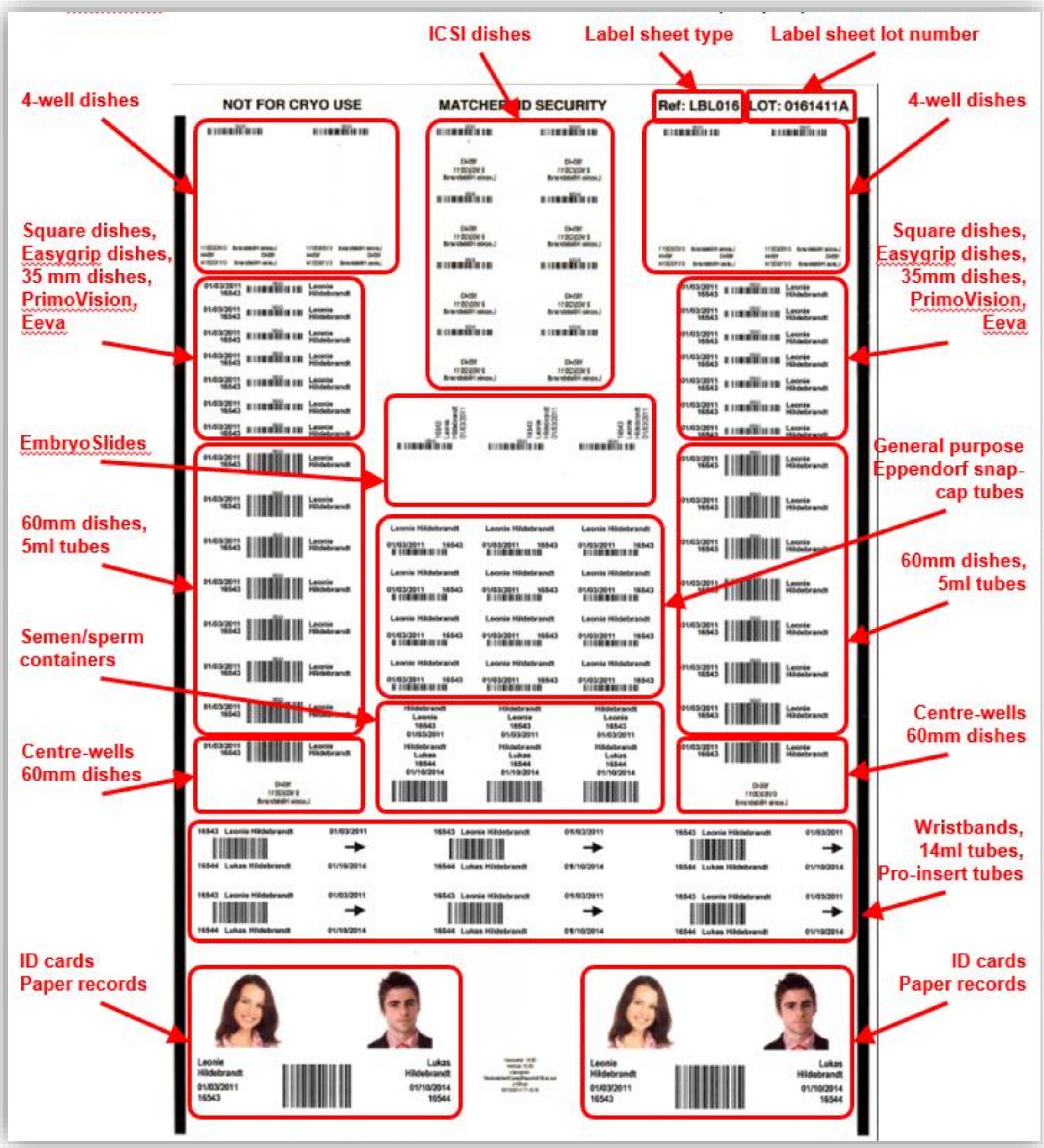
10.6. Laboratory labels

These are a comprehensive sheet of labels for all lab ware and other applications for an entire cycle of treatment (excluding cryo preservation). These should not be used for cryo preservation.



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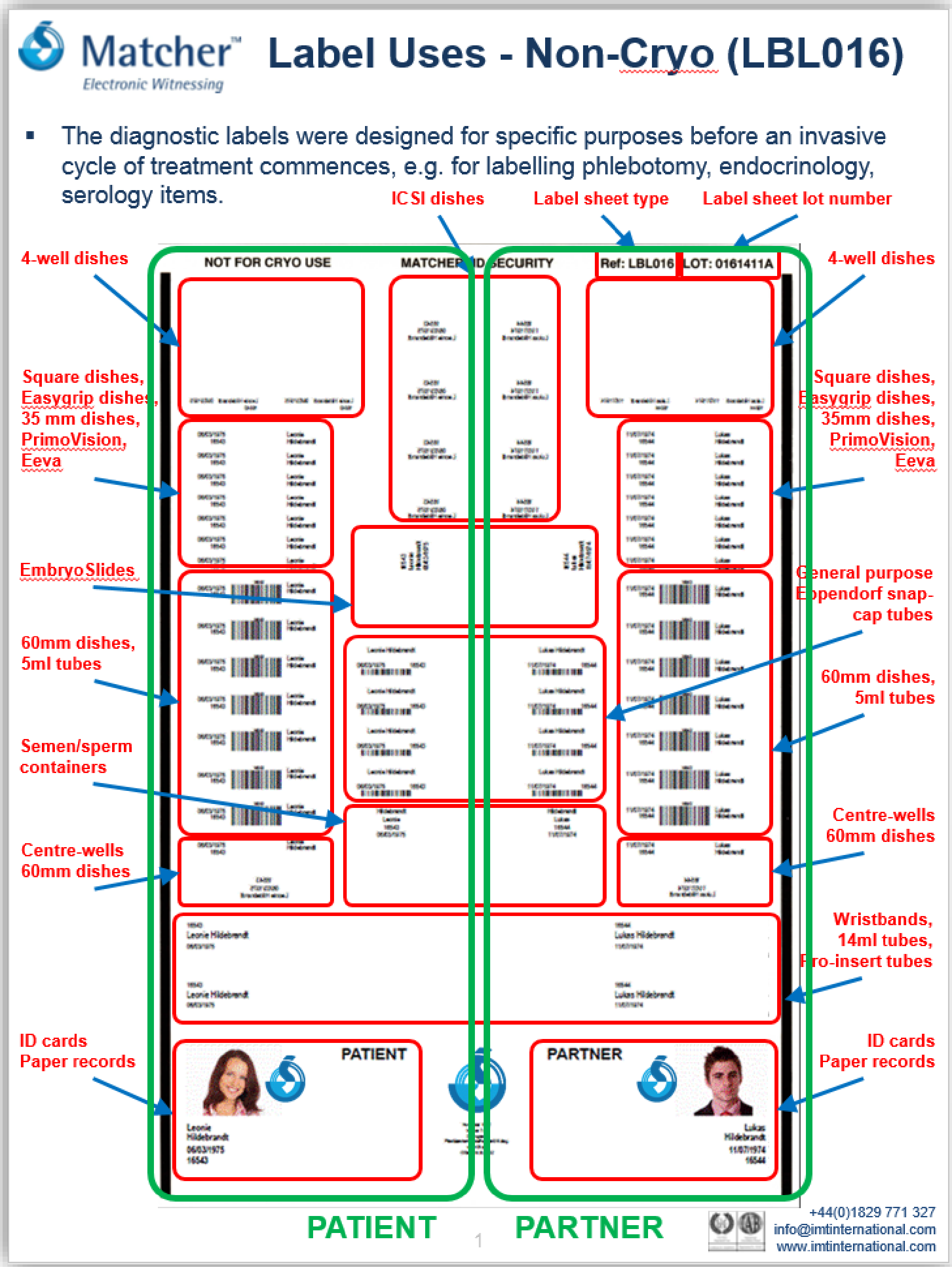
10.7.Diagnostic labels

These labels can be used for diagnostic procedures where male and female labels need to be separately identified e.g. phlebotomy, serology, endocrinology & microscopy.



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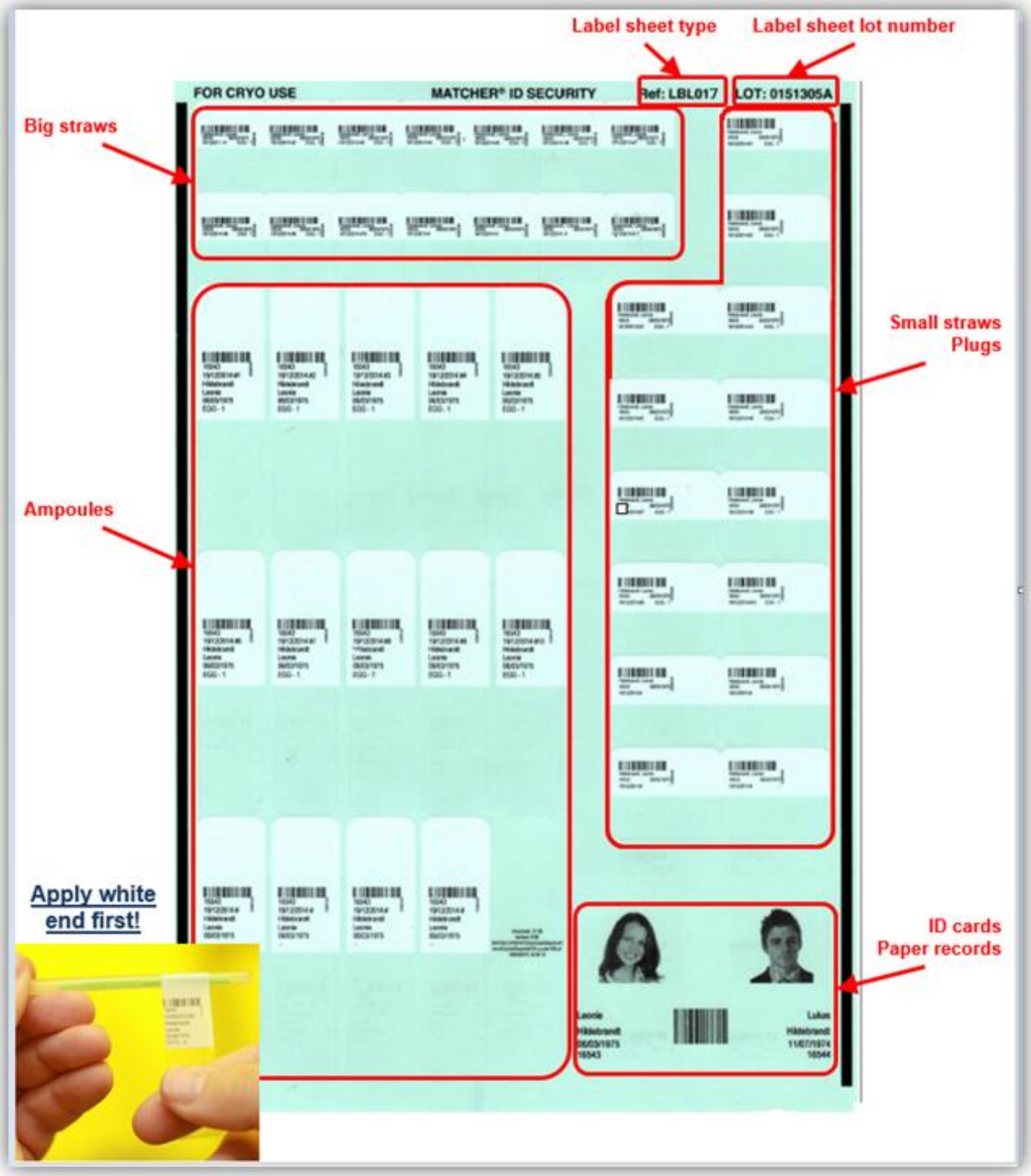
10.8. Cryo labels

These are a comprehensive sheet of labels specifically for cryo preservation, including for the use on different sizes of cryo packaging e.g. cryo vials, cryo straws, vitrification straws.



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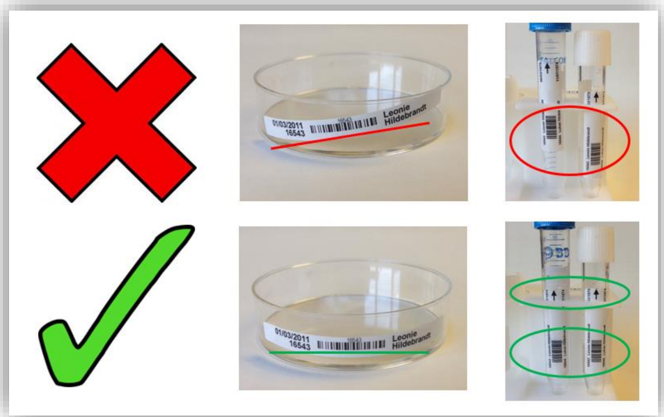
10.9. Label application

10.9.1. Dishes

- Use a dedicated dish label
- Ensure you have applied the labels so that the barcode is visible and straight
- Ensure the labels are consistent across all of the dishes
- With fold under labels, apply the barcode part first, then fold the clear part underneath
- Ensure the text is not obscured and does not obscure microscopy



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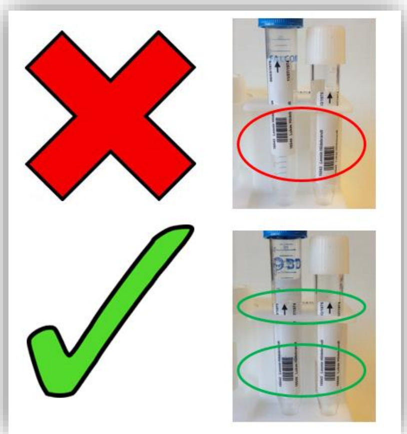
10.9.2. Tubes

- Use a dedicated tube label, taking care to get it straight
- The black arrow should be pointing towards the top of the tube (upwards)
- Bottom of label should be positioned as close to the conical part as possible



10.9.3. Straws

- Use a dedicated straw label, taking care to get it straight
- Ensure you peel off the labels carefully
- Apply the labels ensuring the barcode and patient details are visible and straight

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11. Electronic witnessing using the Pocket Matcher

11.1. Matching with Pocket Matcher – overview

The Pocket Matcher handheld device allows clinics to complete witnessing and batch/lot tracking in areas where there are no fixed benchtop devices such as the operating theatre, stock room, Andrology, reception and sperm collection areas.

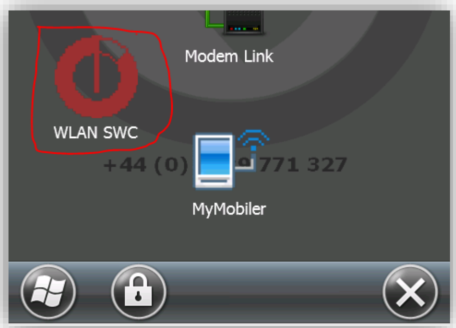
11.2. Honeywell Dolphin black device

The Honeywell Dolphin black device is a handheld Matcher device used in conjunction with the PC to enable clinics to complete witnessing and batch tracking whilst mobile by scanning barcodes.

11.3. Electronic witnessing a procedure with the Pocket Matcher

Please note that you must have a WIFI connection to allow you to use this device.

- To connect your handheld to the WIFI, select the power icon on the home screen of your device
- Select the WLAN SWC button on the main Windows menu



- The WLAN connection page will be displayed

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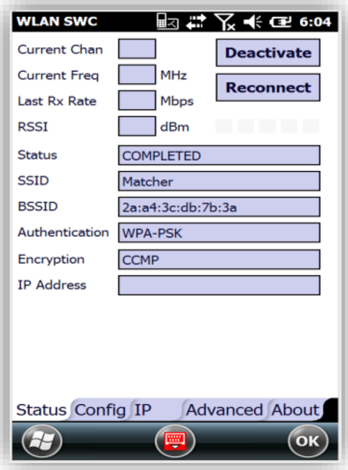
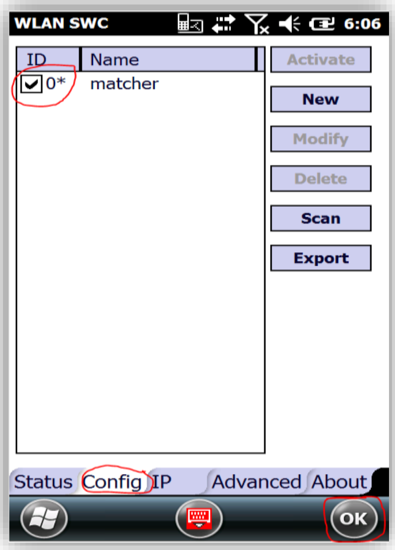
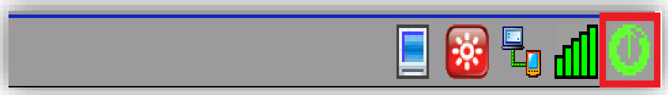


- Navigate to the ‘Config’ tab
- Select the WIFI you want to connect to and select ‘OK’



- You will now be connected to the WIFI
- You will also see on the main screen, the WIFI icon displayed when the Pocket Matcher is connected to the WIFI and will be green, if this is shown red then it will not be connected



- Open the Pocket Matcher by selecting the Matcher icon

- Log in using your user name and password
- Select operation ‘Witnessing’

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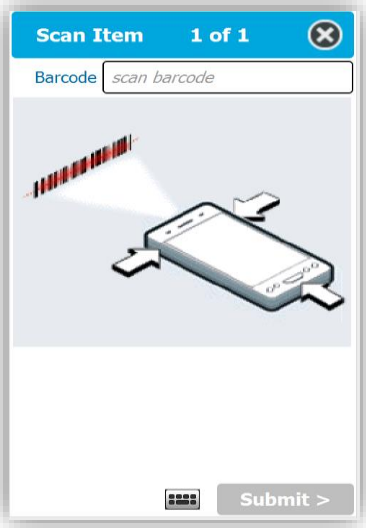
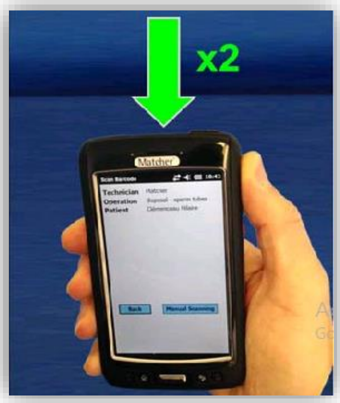
- The patient list will be displayed
- Select ‘Patient’
- Select ‘Witness >’
- Select ‘Active Process Maps’
- Select ‘Route’ from the ‘Procedure List’
- Select the ‘Witness >’ button
- The ‘Scan Item’ page will be displayed showing that you need to scan the barcode



- Point the Pocket Matcher at the barcode



- Press down the silver button on the front of the device until the red guide light is shown and clicks or you can press either of the buttons on the side of the top of the Pocket Matcher
- A photo will be taken and displayed
- Select ‘Accept’ if there is more than one scan item or ‘Submit’ if there is only one scan
- If there is more than one item to be scanned, point the handheld device to the barcode on your second container and repeat steps until all containers have been scanned and accepted

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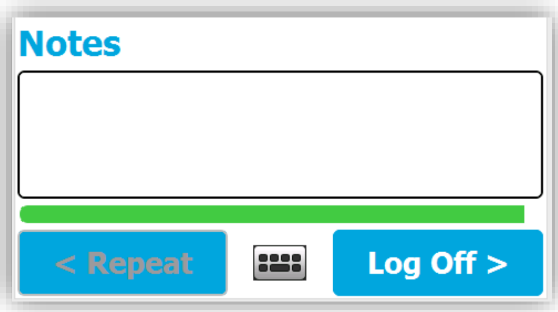
- When the final container has been scanned, select ‘Submit’
- If the witnesses match you will see green text showing ‘Match confirmed’
- If the Witnesses don’t match you will see red text showing ‘No Match’
- If the Witnesses don’t match, you will be asked to select a reason for the no match; if you select ‘Other’ you will be asked to specify
- You can also ‘add notes’ if required
- You can ‘repeat the process’ or ‘log off’
- Please note that the Pocket Matcher now remembers the last route used so that when you log in again to the same patient it will direct you to the last route and the next step to follow

11.4. Progress bar - timeout

- You will see a green progress bar displayed at the bottom of the witness screen once you have completed the witnessing and if you have not logged off, this will automatically time you out. We advise to log off the Pocket Matcher once you complete the witnessing procedure.



- If there is a process which incorporates handheld with Benchtop then the ‘Repeat Button will be disabled once the scan has been performed and submitted, if the ‘Repeat’ button is enabled because it is only a handheld procedure then you will be able to repeat the process.

11.5. Manual entry of barcodes

- On Patient Details, select ‘Witness >’
- Select ‘Active Process Maps’
- Select ‘Procedure List’
- Select ‘Route’
- Select ‘Witness >’
- On the Scan screen take a photo of the barcode by selecting the ‘silver button’
- Manually enter the barcode
- Select ‘Submit >’
- The barcode will be saved manually with your photo
- You can add notes if applicable
- Select ‘Log off >’

11.6. Repeating a witness step on the Pocket Matcher

- Once you have started the above procedure and submitted the witnessing
- If the barcodes match, the green message ‘Match confirmed’ will be displayed

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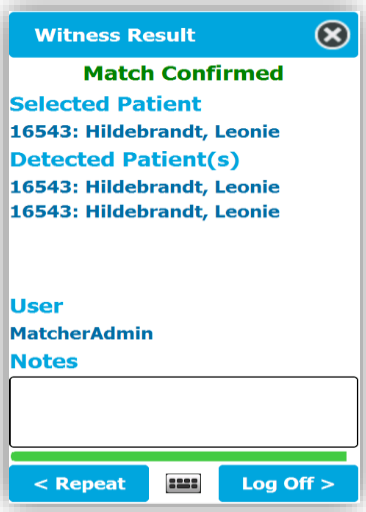
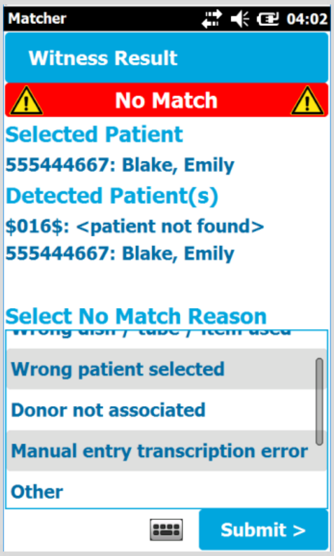


- You can ‘add notes’ if required
- The ‘<Repeat’ button can be selected if the same witness step needs to be repeated
- If the witnesses step does not match, the red message ‘No Match’ will be displayed and you will be asked to select a reason.



- You can also ‘add notes’ if required
- You can select ‘ < Retry’ to repeat the process and retry the reading of the barcode
- You will be asked to complete the witness stages of the process
- Once complete, ‘Log off >’

11.7.Overriding to a procedure out of sequence on a Pocket Matcher

Procedures are set in a specific sequence in Matcher to replicate your standard operating procedures. You can perform procedures out of the specified order, but you will need to specify why you are ‘overriding’ the specified sequence. This is then recorded in Matcher.

- Select the operation you want to perform
- The patient list will be displayed
- Select the patient
- Select ‘Witness >’ on the Patient Details screen

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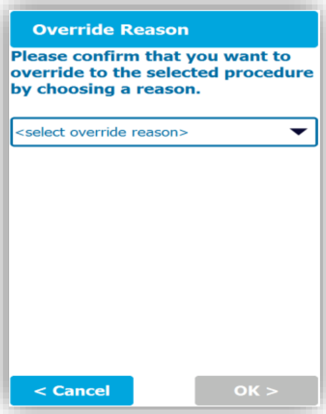
- From ‘Active Process Maps’ select the ‘process map’ you want to perform
- You will be asked to complete an override reason from the drop down menu



- Select an appropriate error from the drop down menu
- Select the ‘OK’ button
- There will be a log in the ‘Override Report’ of the change made in the process

12. Electronic witnessing using a Benchtop Matcher device

12.1. Matching with a benchtop device – overview

The benchtop device allows clinics to prevent error through misidentification of patients and their gametes and embryos. The Matcher system provides you with electronic traceability, recording 'who, what, where and when' at every transfer step. Operating seamlessly throughout the clinic, including Cryo stores, theatres and laboratories, Matcher is relied on by doctors, embryologists, quality managers, nurses and directors alike.

12.2. IVF Matcher device

- The IVF Matcher Device is the white Matcher system as shown that allows you to match two dishes and test tubes. The cameras within this device have two cameras facing forward and one to the side.

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12.3. Andrology Matcher device

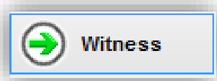
- The Andrology Matcher device is the white Matcher system as shown below that allows various sized dishes and tubes to be witnessed using various tube racks. The cameras on this system are all facing forward

12.4. Matcher tube rack

- Tube racks are used to steady the tubes and dishes when witnessing, keeping them secure.

12.5. Witnessing a procedure with a Benchtop Matcher

- On the ‘Patient Details’ screen
- Select the ‘Witness’ button



- Select ‘Procedure’
- Select ‘Route’ and ‘Procedure’
- You will see the witnessing prompt screen advising it is ready to witness

- Select 'Witness'
- If the dishes match, you will see the following message

- You can add notes once witnessed to accompany the Match Confirmed status
- Select 'Continue' and this will take the user back to the Patient Details page
- Details of the match will be displayed in the Matches tab on the Patient Details page
- If the match is not the same, the user will hear a loud alarm and see the following message

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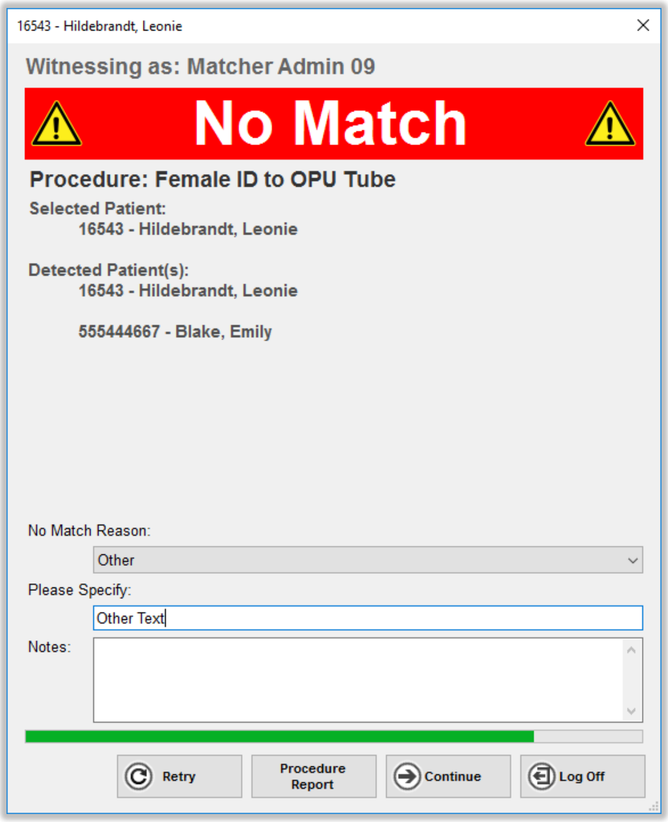
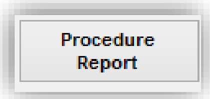


- You will need to select a reason for the no match. If you select ‘Other’ you will be prompted to specify further details.
- You can add notes if you wish
- Select ‘Retry’ to retake the witness procedure
- You can see a print out of the No Match using the ‘Procedure Report’ button



- A Procedure Report will be displayed

12.6. Manual entry on a Benchtop Matcher

- On the Witnessing screen select the ‘Witness’ button
- If the barcode does not scan correctly you will see displayed a ‘Manual Entry’ screen
- A photo will be taken but you may not be able to read the photo clearly

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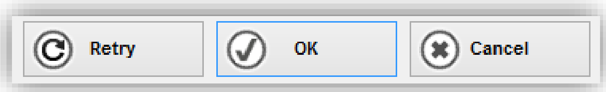
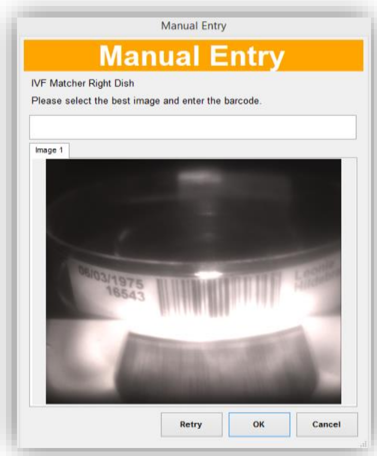
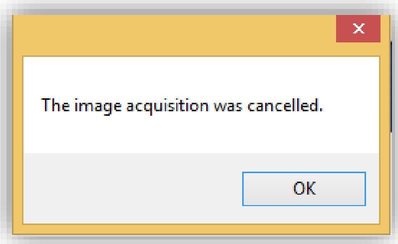
- Manually enter the barcode in the field at the top of the screen under the message ‘Please select the best image and enter the barcode’
- Once you have entered the barcode select either the ‘OK’, ‘Retry’ or ‘Cancel’ button





- Retry will allow you to retake a photo
- OK will confirm the match and you can type in Notes
- Cancel will cancel the request and pop up a message advising ‘The image acquisition was cancelled’ and select ‘OK’.



12.7. Repeating a witness step on Benchtop Matcher

- Once you have started the above procedure and submitted the Witnessing
- If the witnesses match you will see green text showing ‘Match confirmed’
- You can add notes if required
- If the witnesses don’t match you will see red text showing ‘No Match’
- You can add notes if required
- On both occasions you can select ‘Retry’
- Again you will be asked to complete the witness stages of the process
- Once completed, you are able to ‘Continue’ or ‘Log off’

12.8. Overriding to a procedure out of sequence on Benchtop Matcher

Procedures are set in a specific sequence in Matcher to replicate your standard operating procedures. You can perform procedures out of the specified order, but you will need to specify why you are ‘overriding’ the specified sequence. This is then recorded in Matcher.

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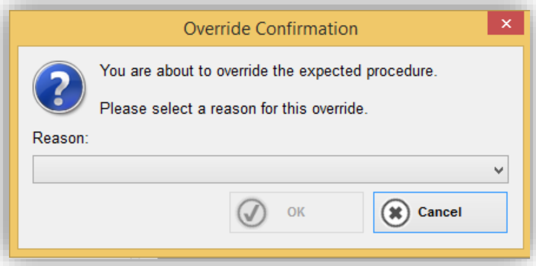
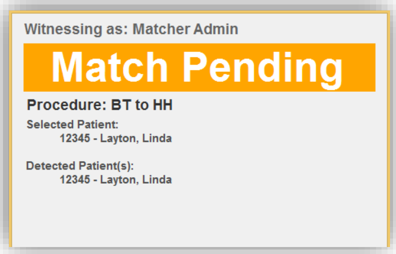
- From Active process maps select your process you want to perform
- Select the ‘Routes and Procedure’ you want to perform
- You will be asked to complete an override reason from the drop down menu



- Select an appropriate override reason from the drop down menu, the ‘OK’ button will be enabled
- Select the ‘OK’ button
- There will be a log in the ‘Override report’ of the change made in the process

12.9. Electronic witnessing using a combination of a Pocket Matcher and a Benchtop

- Select ‘Witness’ button on the Patient details
- Select ‘Active Process Maps’
- Select ‘Route’ and ‘Procedure’
- Select ‘Next’ button
- You will see the witnessing prompt screen advising it is ready to witness
- Place the dish in front of the Matcher Benchtop as displayed
- Select ‘Witness’ button
- The user will see the ‘Match Pending’



- Select ‘Continue’
- Log into the Pocket Matcher device
- Select the operation ‘Witnessing’
- Select the patient
- Select ‘Witness >’ button
- Select the ‘Route and Procedure’
- Select ‘Witness’
- Scan the dish or tube
- The barcode will be detected
- Select ‘Submit >’
- ‘Match Confirmed’ will be displayed
- Select ‘Log Off >’button
- If you should have a ‘No Match’, a sound will alert the user and you will see the ‘No Match’ message
  Please note that you will be unable to retry the witness on the Pocket Matcher

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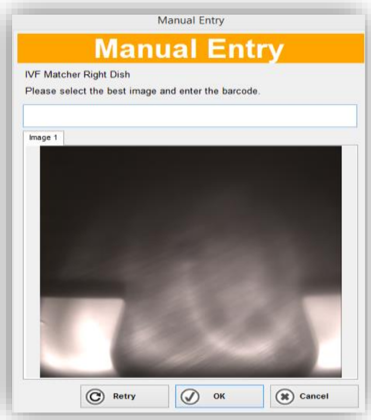
- The procedure report will be displayed on the 'Matches' tab of the 'Patient Detail' screen

12.10. Not enough barcodes for a procedure when you are expecting several

- Select the 'Witness' button
- Select the 'Active Process Maps'
- Select 'Next' button
- Select 'Route and procedure'
- Select 'Next' button
- Select 'Witness' button
- If the procedure is expecting several tubes, It will take photos of the dishes that are found then you will see the 'Manual Entry' screen



- Enter the Patient ID in the blank space
- Select 'OK'

12.11. Too many barcodes for a procedure when you are expecting only a single barcode

- Select the 'Witness' button
- Select the 'Active Process Map'
- Select 'Next'
- Select 'Route and procedure'
- Select 'Next' button
- Select 'Witness' button
- If the procedure is only expecting one tube but you have two tubes in the rack you will then see the following screen

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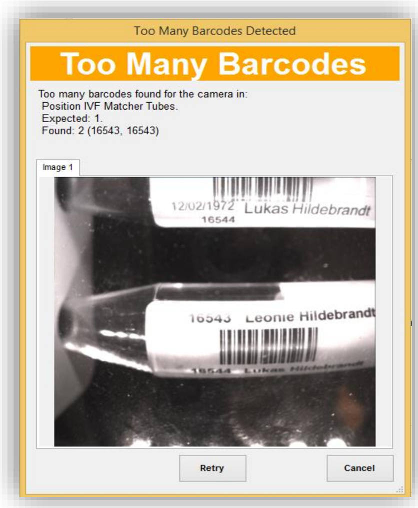
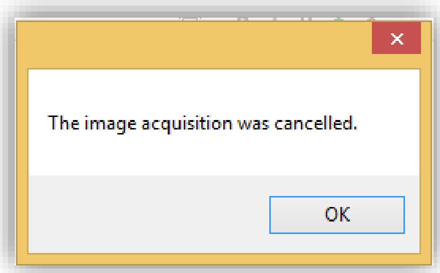


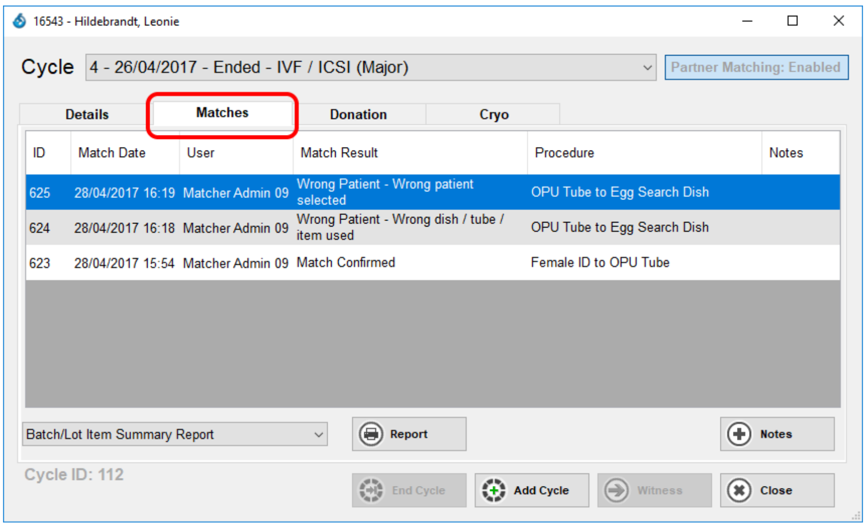
- Select the 'Retry' button and you will be taken back to the witnessing page and it will retry taking the photo
- Select 'Cancel' button and you will see a pop up message displayed stating 'The image acquisition was cancelled'.



- Select the 'OK' button
- You will be taken back to the 'Patient Details' page

12.12. Viewing completed matches

All completed witness steps (including 'No Match' and 'Wrong Patient results as well as procedures completed on a Pocket Matcher) can be viewed on the **Patient** > **Matches** screen as shown below:



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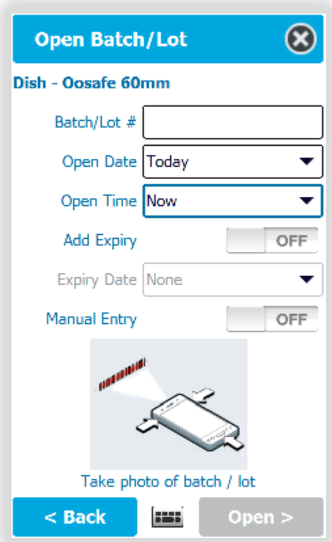
13. Batch/lot tracking using a Pocket Matcher

13.1. Batch/lot tracking – Overview

Allows you to complete Batch/Lot tracking on items that have been ordered. By completing these details, you can track when items have been opened and used. Should there be any issues with Batch items you can audit which batch was used and when.

13.2. Scanning a new consumable

- Ensure your handheld device is connected to WIFI
- Click on the Matcher icon and sign in
- Select Batch/Lot Tracking
- Select the Batch/Lot Type
- Select the Product from the Product List
- The Product Details will be displayed
- Select the 'New >' button



- User will be directed to 'Open Batch/Lot' page

- Scan the Batch/Lot number (LOT: 0161502A) by selecting the silver button on the bottom centre of your handheld device
- Set Open Date and Open Time (must not be in the past)
- If you want to use today's date and time, leave the defaults in as shown above and select Open Batch/Lot
- If you want to add an expiry date, select the Add Expiry switch to turn it on
- Select the Expiry Date – this is the expiry date of the product
- Select the 'Open >' button

13.3. Manual entry of batch / lot number

- Select Batch/Lot Tracking
- Select the Batch/Lot Type
- Select the Product from the Product List
- The Product Details will be displayed
- Select the 'New >' button

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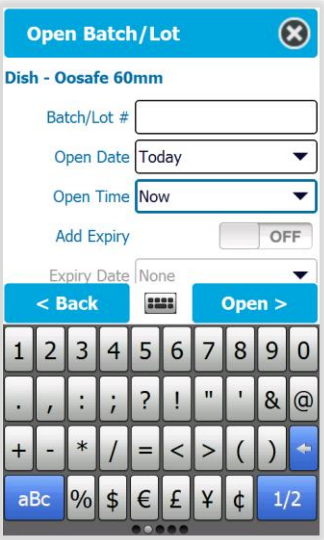
- The Open Batch/Lot page will be displayed
- Scan the Batch/Lot number (LOT: 0161502A) by selecting the silver button on the bottom centre of your handheld device, this will take a photo of the Batch/Lot item
- Select the Manual Entry button to ON
- This will enable the keyboard and make the Batch/Lot # field editable



- Manually enter the Batch number / Lot Number (LOT: 0161502A)
- Set Open Date and time (Must not be in the past)
- If you want to use today's date and time, leave the defaults in as shown above and select Open Batch/Lot
- If you want to add an expiry date, select the Add Expiry switch to turn it on
- Select the Expiry Date – this is the expiry date of the product
- Select 'Open >'
- Batch/Lot will now be open and registered with the date and time

13.4. Batch/lot alerts on a Pocket Matcher

- Log into Matcher
- On the main page you will see two icons displayed

- The left icon will display the number of warnings there are on the batch items that are due to expire
- The right icon will display the number of critical alerts there are on the batch items that have exceeded the date of expiry
- They will appear grey in colour as displayed above when there are no alerts or warnings
- When there are warnings these will be displayed in orange

- When there are critical alerts these will be displayed in red

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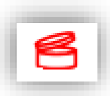


- Click on each of the icons individually and you will be taken to the warnings and the critical alerts in the Product list
- Once in the Product List, select the item and you will be taken to the Batch/Lot Edit screen
- Here you can identify the Batch/Lot items that are due to expire or have expired and/or close the Batch/Lot item

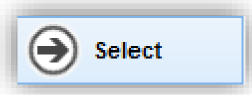
14. Batch/lot management (PC only)

14.1. Creating a product type

- Navigate to the Tools menu at the top of the Matcher system
- Select 'Matcher Type Management'
- Select 'Product Type'
- Select the 'Add' button
- Add a Product Type (Name)
- Select the 'OK' button
- Select the 'Save' button
- Select the 'Close' button

14.2. Editing a product type

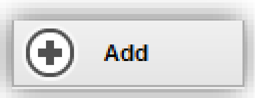
- Navigate to the Tools menu at the top of the Matcher system
- Select 'Matcher Type Management'
- Select 'Product Type'
- Select a Matcher Type Item from the 'Matcher Type Item List' by clicking once on the item once and selecting the 'Select ' button



- Edit the Matcher Type Item
- Select the 'OK' button
- Select the 'Save' button
- Select the 'Close' button

14.3. Adding a new product

- Select Batch/Lot Item Management
- Select a Product type from the Product List in the drop down menu
- Select 'Add' button



- Name your Product in the Batch/Lot Edit screen
- Enter the Product Code if available

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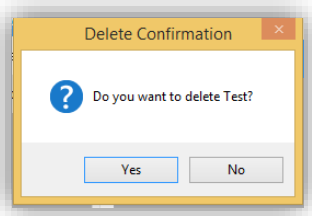
- Enter the Manufacturer if available (note that the manufacturer is searchable and is therefore useful to record)
- Select the use within date if applicable (days)
- Select an alert within if applicable (days)
- Select the 'Save' button

14.4. Deleting a product

- Select Batch/Lot Management
- Select the Product you want to delete
- Select the 'Delete' button

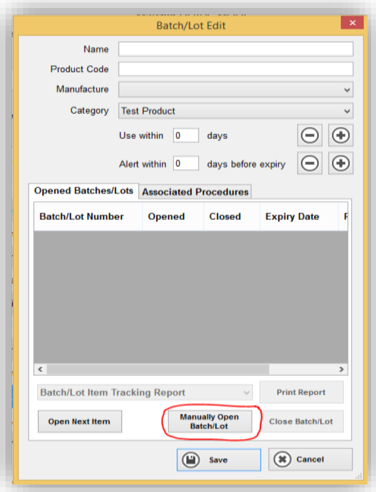
- A window will pop up asking you for verification that you want to delete the Batch/Lot Item



- Select the 'Yes' button
- The Product will be deleted

14.5. Opening a batch/lot

- Select Batch/Lot Management
- Select Product Type from drop down menu
- Select Product Item
- In Batch/Lot Edit select Manually Open Batch/Lot
- Select 'Manually Open Batch/Lot button



- The Manually Open Batch/Lot Item window is displayed

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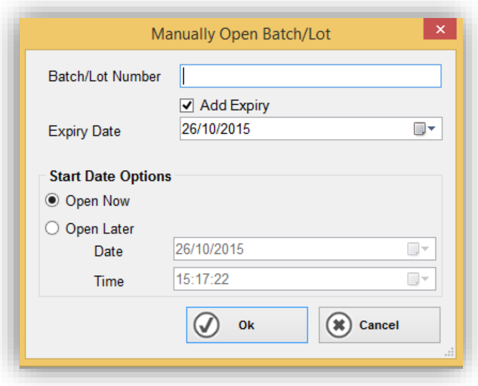
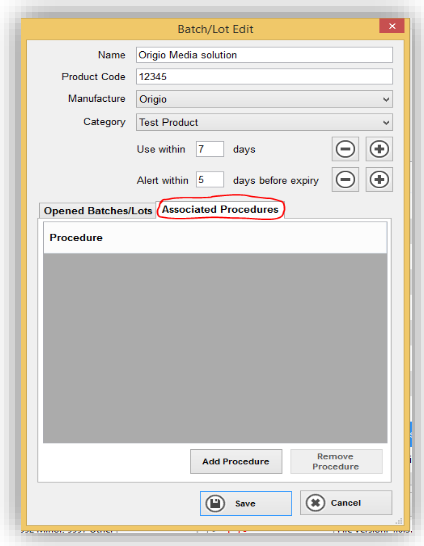


- Complete this by entering the Batch/Lot number
- If the Batch/Lot has an Expiry Date, leave the tick box in the ‘Add Expiry’ tick box and enter an Expiry Date using the calendar function (The date defaults to today’s date)
- If the Batch/Lot does not have an expiry date, untick the ‘Add Expiry’ tick box
- From the Start Date Options section, select radio button ‘Open Now’ or ‘Open Later’
- If you wish to have a delayed open date, select the Open Later radio button and set the Date and Time
- Select OK
- You can also add a procedure to this Batch/Lot if required. To select a procedure against the Batch/Lot, select the Associated Procedure tab on the Batch/Lot Item Edit page



- Select the ‘Add Procedure’ button
- The Procedure Search will be displayed
- Select the Procedure Type from the drop down menu
- Select the Procedure by a single click and selecting the ‘Select’ button or double click the procedure
- Select the ‘Save’ button

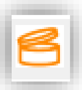
14.6. Open next item

- Select Batch/Lot Item Management
- Select a Product Type from the drop down menu
- Highlight the Product and click on the ‘Select’ button
- Select the ‘Open Next Item’ on the Batch/Lot edit screen
- A new item will be opened within that Batch/Lot using the same Batch/Lot number as the previous Item
- Select ‘Save’ button

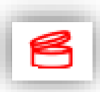
14.7. Batch/lot alerts on a PC

- Log into Matcher
- On the main page you will see two icons displayed

- The left icon will display the number of warnings there are on the batch items that are due to expire
- The right icon will display the number of critical alerts there are on the batch items that have exceeded the date of expiry
- They will appear grey in colour when there are no alerts or warnings
- When there are warnings these will be displayed in orange



- When there are critical alerts these will be displayed in red

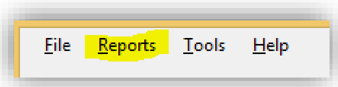


- Click on each of the icons individually and you will be taken to either the Batches/Lots due to expire and Batches/Lots expired in the Product list
- Once in the Product Lists, select the item and you will be taken to the Batch/Lot Edit screen
- Here you can identify the Batch/Lot items that are due to expire or has expired and close the Batch/Lot item

15. Reporting

15.1. Global reports

Global Reports are the list of the Reports that are displayed in the Reports section at the top of the Matcher pages and are available for all users, these are the Administrative reports.



Reports displayed in this section are

- **Active Batch/Lot Report** – Summary of the Batches/Lots that are in use, their Batch/Lot numbers, the User and the Start date, start time and Batch/Lot Number

- **Active Patient Report** – Summary of all Patients who have active cycles

- **Batch/Lot Report** – This is a periodic report detailing the summary of Batches/Lots that have been used. It shows the Start date, Batch/Lot Number, Product, User and Finish Date and Time.

- **Donor List Report** – Summary of all the Patient ID’s and Donor names for that clinic.

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- **Expired Batch/Lot Report** – This is a periodic report detailing Expired Batch/Lots that were in use within procedures on active Patients for auditing purposes.

- **Expiry of Consent Report** – A periodic report detailing a summary of Expiry on all Consent provided across the Patients. This report details the Patient ID, Patient Name, Freeze Date and the Consent period in years. This report is only used in Cryo Management.

- **Mismatch Report** – A periodic report detailing the miss-matches occurred in the witnessing procedure. This report details the Date and Time, the selected patient, the Procedure, any Remarks/comments made, the Camera position and the Embryologist who has performed the procedure.

- **Override Report (All Patients)** – A periodic report detailing Override Procedures performed across all patients. This report details the Date and Time, the Patient ID, the Patient Name, the Expected Procedure, the Performed Procedure, the Reason for the override and the User.

- **Patient Records viewed by Date Range** – A periodic report which details the Patient records that have been viewed within a set date range. This report details the view date and time, the User and the Patient's ID and Name.

- **Patient Records viewed by User** - A summary of the Patients viewed by User, you will select your User from a drop down menu. The report will detail the View Date and Time and the Patient.

- **Procedure Details** – Summary of all of the Procedures, Matching options and linked Batch/Lot Items. There are fields for the Description and Donation type but these will only be prefilled if you enter this information on the Add/Edit Procedure screen.

- **Process Map Details** – Details all current versions of process maps.

- **Witnessed Procedures Summary Report** – A periodic report detailing a summarised view of all the witnessing procedure performed and their results. The report will display the Date and Time, the Patient ID, the Patient Name, the User, the Procedure, the Match Result and any additional notes.

15.2. Patient reports – cycle dependant

Patient reports are only available for Patients who have had a cycle, A summary of the Patient reports are as follows:

- **Batch/Lot Summary Report** (This Patient) – Summary of the Batches/lots used on this Patient. It will indicate the procedure, Batch/Lot numbers, Product and Dates and times

- **Override Report** (This patient) - Summary of all deviations from prescribed procedure process maps. Includes date / time / embryologist / patient / expected procedure / actual procedure

- **Patient Report** - Summary of all procedures throughout each cycle including date / time / embryologist / procedure / match status / and any remarks added.

- **Procedure Photo Album** - Full summary of all procedures with reference to an accompanying witness form (embryologist / procedure / workstation ID / date / time / match status / any remarks / patient details / photo of all items of lab ware including patient details).

- **Procedure Report** - Witness form including embryologist / procedure / workstation ID / date / time / match status / any remarks / patient details / photo of all items of lab ware including patient details

15.3. Patient reports – not dependant on cycle

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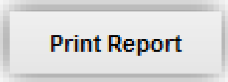
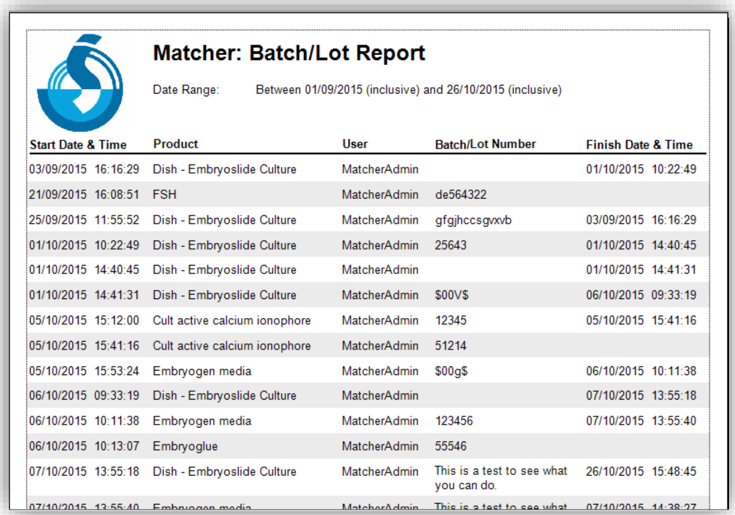
- Patient Reports not dependant on Cycle can be viewed on the Patient information page on the Matches tab
    - **Donor Recipients Report –** This is a summary of Donations made on this patient's record
    - **Patient Details Edit Log –** Summary of when the Patient Details have been edited
    - **Patient Records Viewed Report –** Summary of when the Patients record has been viewed and by whom
- These can be selected by selecting from the drop down menu and selecting 'Print Report' button



15.4.Product report

- The Product Report for all patients can be found under the Global Reports by selecting Reports at the top of the Matcher menu on the PC

- In the drop down menu select 'Product Report'
- You will see a list displayed of all the Products that have been opened by all Users



Matcher: Batch/Lot Report

Date Range: Between 01/09/2015 (inclusive) and 26/10/2015 (inclusive)

Start Date & Time	Product	User	Batch/Lot Number	Finish Date & Time
03/09/2015 16:16:29	Dish - Embryoslide Culture	MatcherAdmin		01/10/2015 10:22:49
21/09/2015 16:08:51	FSH	MatcherAdmin	de564322	
25/09/2015 11:55:52	Dish - Embryoslide Culture	MatcherAdmin	gfgjhccsgvxvb	03/09/2015 16:16:29
01/10/2015 10:22:49	Dish - Embryoslide Culture	MatcherAdmin	25643	01/10/2015 14:40:45
01/10/2015 14:40:45	Dish - Embryoslide Culture	MatcherAdmin		01/10/2015 14:41:31
01/10/2015 14:41:31	Dish - Embryoslide Culture	MatcherAdmin	$00V$	06/10/2015 09:33:19
05/10/2015 15:12:00	Cult active calcium ionophore	MatcherAdmin	12345	05/10/2015 15:41:16
05/10/2015 15:41:16	Cult active calcium ionophore	MatcherAdmin	51214	
05/10/2015 15:53:24	Embryogen media	MatcherAdmin	$00g$	06/10/2015 10:11:38
06/10/2015 09:33:19	Dish - Embryoslide Culture	MatcherAdmin		07/10/2015 13:55:18
06/10/2015 10:11:38	Embryogen media	MatcherAdmin	123456	07/10/2015 13:55:40
06/10/2015 10:13:07	Embryoglue	MatcherAdmin	55546	
07/10/2015 13:55:18	Dish - Embryoslide Culture	MatcherAdmin	This is a test to see what you can do.	26/10/2015 15:48:45
07/10/2015 13:55:40	Embryogen media	MatcherAdmin	This is a test to see what	07/10/2015 14:38:27

- Once the report is displayed, you are able to Export, Print or copy the report

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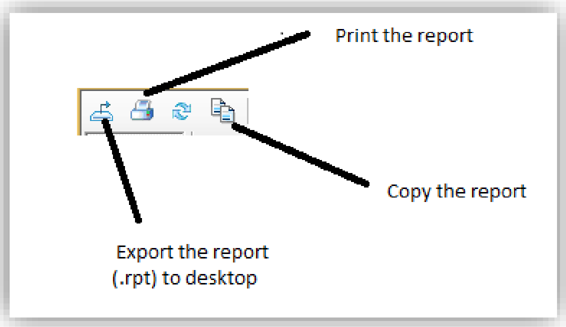


15.5.Cryo patient report

- Navigate to the Cryo Tab within the Patient Details
- Select the Patient Cryo Report button

- The Patient Cryo Report will be displayed

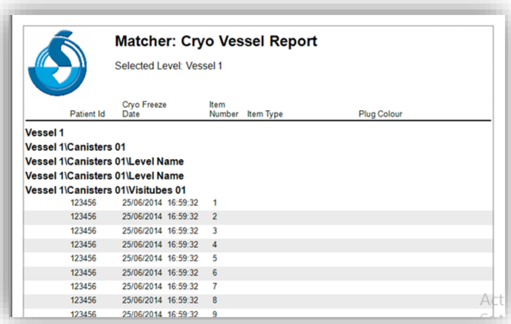
Matcher: Cryo Patient Report

Patient Name: Leonie Hildebrandt
ID: 16543

Item Number	Item Type	Qty	Stage	Plug Colour	Rejected	Location/Reason For Removal
Cryo Freeze Date: 03/11/2014 15:52:51						
1	Cryo Freeze Item Type 1	1	Stage 1	Plug Colour 1	No	Vessel 5\Can 01\Cane 01 : 03/11/2014
2	Cryo Freeze Item Type 1	1	Stage 1	Plug Colour 1	No	Vessel 5\Can 01\Cane 01 : 03/11/2014
3	Cryo Freeze Item Type 1	1	Stage 1	Plug Colour 1	No	Vessel 5\Can 01\Cane 01 : 03/11/2014

15.6.Cryo vessel report

- Select ‘Cryo Stores Management in Tools’
- Select a ‘Vessel’ from the list displayed
- Select reports’ from the top menu
- Select ‘Vessel reports’
- A Matcher Cryo Vessel report will be displayed to the user



Matcher: Cryo Vessel Report

Selected Level: Vessel 1

Patient Id	Cryo Freeze Date	Item Number	Item Type	Plug Colour
Vessel 1				
Vessel 1\Canisters 01				
Vessel 1\Canisters 01\Level Name				
Vessel 1\Canisters 01\Level Name				
Vessel 1\Canisters 01\Visitubes 01				
123456	25/06/2014 16:59:32	1		
123456	25/06/2014 16:59:32	2		
123456	25/06/2014 16:59:32	3		
123456	25/06/2014 16:59:32	4		
123456	25/06/2014 16:59:32	5		
123456	25/06/2014 16:59:32	6		
123456	25/06/2014 16:59:32	7		
123456	25/06/2014 16:59:32	8		
123456	25/06/2014 16:59:32	9		

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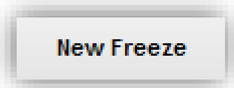
15.7. Cryo movement report

- Select ‘Cryo Stores Management’ in tools
- Select a ‘Vessel from the list displayed
- Select ‘Reports’ from the top menu
- Select ‘Movement report’
- Enter date parameters for the report
- Select OK
- The ‘Movement report’ will be displayed

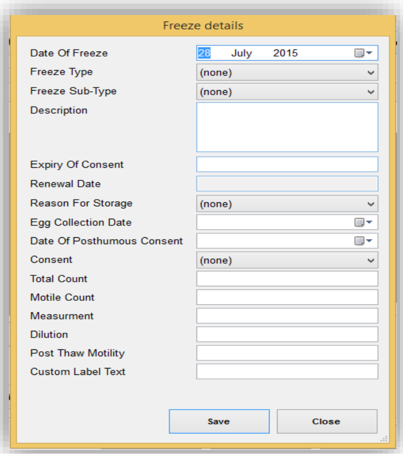
16. Freeze batches

16.1. Creating a new freeze batch (Cryo tab in Patient details)

- In the Cryo tab, select the ‘New Freeze’ button



- Select the Date of Freeze (Default is today’s date)
- Select Freeze Type from the drop down menu – this field denotes patient/partner or anonymous details on the printed label sheet
- Select Freeze Sub-Type from the drop down menu
- Enter description if further information relating to the freeze batch needs to be recorded
- Enter Expiry of Consent in years this will appear in the Expiry of Consent report
- Enter the Renewal Date (this will automatically be created if you have entered Expiry of Consent year)
- Select reason for Storage from the drop down menu – this will appear in the Cryo Patient report
- Enter Egg Collection date – if applicable
- Enter the Custom Label text (i.e. freeze batch number or donor number)
- Select ‘Save’



16.2. Creating item(s)

- An item can be defined as a single unit e.g. a straw, an ampoule/Vial or a vitrification receptacle
- Select the ‘Add Item(s)’ button
- The Freeze Items page will be displayed
- Select ‘Item Type’ from the preconfigured drop down menu

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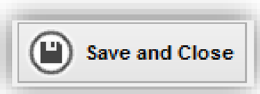
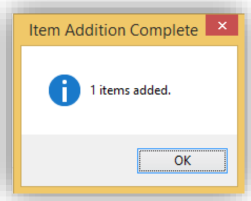
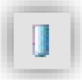
- Select the ‘Contained Quantity’ from the drop down menu. This is the number of embryos oor oocytes contained in each item. In the case of sperm, this can be left as 1.
- Select the ‘Stage’ of development from the stage type drop down menu if applicable
- Select the ‘Plug colour’ from the drop down menu if applicable
- Enter the ‘description’ if additional information relating to the items is required to be recorded
- Select the ‘number of items to add’ from the drop down menu
- If additional items of a different type/stage is contained quantity need to be added to the freeze bacth then the above process can be repeated until all relevant items have been added
- Select the ‘Save and Close’ button



Pop up window will be displayed showing Item(s) added

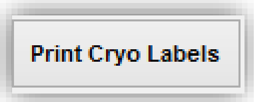


- Select OK to close window
- You will then see this icon displayed next to the item you have just added which means this is a new item created that has not been allocated in Cryo stores yet



16.3. Printing cryo labels

- Select the Print Cryo Labels button



- The Cryo Labels template will be displayed with the Patient details
- Select the Print icon
- Select your printer
- Ensure the Labels are placed correctly in the printer
- The Labels will be printed

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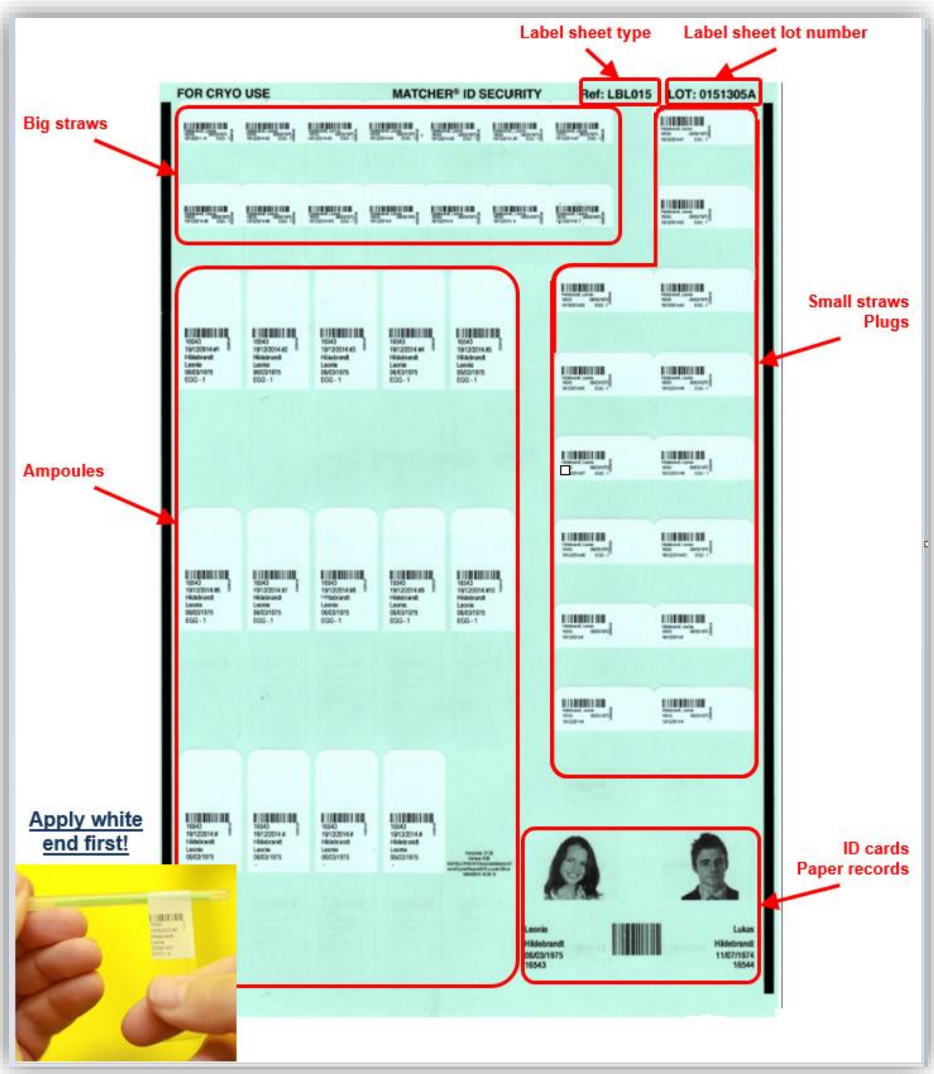

16.4. Allocating freeze items to cryo storage

- Highlight the items for storage and select the ‘Allocate to Storage’ button
- The Select Storage Location screen will appear
- Choose the appropriate location within the preconfigured tank structure. Each level shows the amount of free space within it.
  Please note that only lower levels designed to contain items will allow storage. Similarly the number of items will be limited and often locations are restricted to single patients depending on the configuration of the tank structure.
- Select the ‘Save’ button
- You will see an icon like this displayed next to the freeze item you have allocated to storage

- You will see a green arrow pointing into the cane

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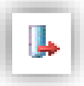
16.5. Moving freeze items to another storage location

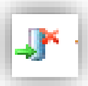
- This can be carried out at any time
- Select the cryo preserved item you wish to move
- Select the 'Move Storage Location' button
- The 'Select Storage Location' screen will appear
- Select the new storage location
- Select the 'Close' button
- You will see this generic test tube icon highlighted on the Freeze Items section of the Cryo Page



- You will see a red arrow displayed showing the item has been moved to another storage location

16.6. Reject item(s)

- Items can be rejected if you wish to continue storing items but mark them as lower priority for use e.g. inferior embryos
- Select the cryo preserved item you want to reject
- Select the 'Reject item(s)' button
- A Reject Items pop up window will be displayed asking 'Do you want to reject the selected item(s)?'
- Select 'Yes'
- You will see this generic test tube icon highlighted on the Freeze Items section of the Cryo Page



- There will be a red cross displayed next to the item to indicate this item has been rejected

16.7. Accept item(s)

- Accept Items allow you to reaccept items after they have been rejected
- Highlight the item and select the 'Accept Item(s)' button
- An Accept Items pop up window will be displayed asking 'Do you want to accept the selected item(s)?'
- Select 'Yes'
- You will see the following generic icon displayed next to the item to indicate this item has been accepted

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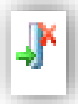
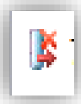
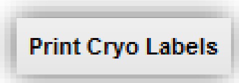
16.8. Cryo status

The table below illustrates the summary of the Cryo Status Icons:

State No	Image	Process
1		Item not currently in storage
2		Item currently in storage
3		Rejected item currently in storage
4		Item that has been removed from storage
5		Rejected item that has been removed from storage

16.9. Printing cryo labels

- On the Cryo Tab of the Patient details page, select ‘Print Cryo Labels’



The Matcher Crystal report for the Cryo Labels will be displayed

- Select the Print icon
- The Cryo Label Sheet produced will be specific to the freeze type and the text will be configured to the freeze type in accordance with the relevant competent authority requirements.
- The Cryo Labels are to be printed on the LBL015 or LBL017 sheets

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17. Procedure management

17.1. Overview

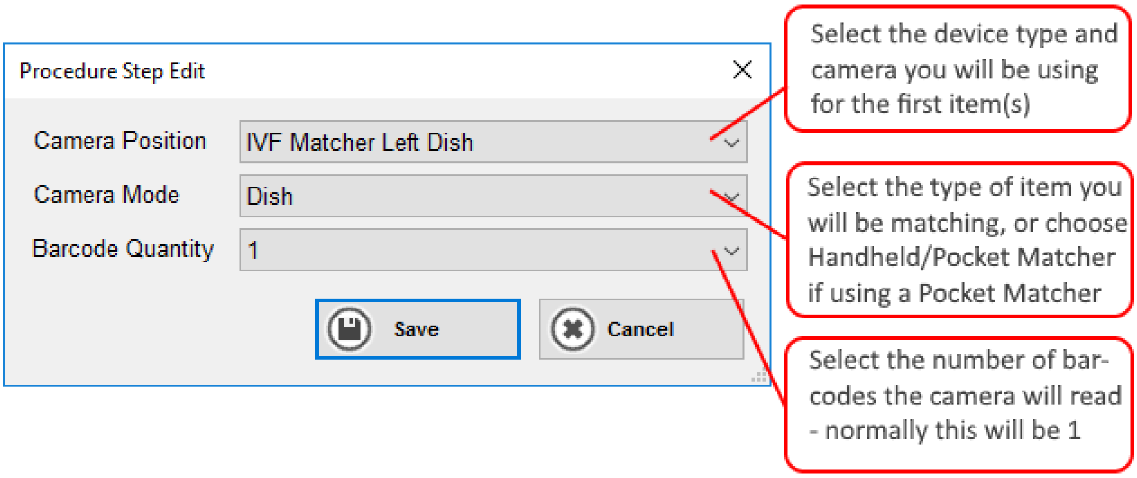
A procedure is a witnessing step within a process, such as checking a patient wristband against an oocyte collection dish. All witness steps, or procedures, are pre-configured in Matcher before you do any witnessing so that Matcher knows how many barcodes to expect and which camera or device type you are using for that witness step. You can edit procedures to change these details once they've been set up.

17.2. Creating a new procedure (defining the witness steps)

- Log on to Matcher
- Click **Tools** > **Procedure Management**
- Select a Procedure Type from the drop down menu
- Click the **Add Procedure** button
- Complete the following fields in the Procedure Edit screen:

  Name : this is the name of the procedure that will appear when witnessing and on witnessing reports
  Description : you can complete a description of the procedure if required
  Donation Type : if this is a witness step for matching donor material, then you must specify the Donation Type and it must match the type of donor whose material you will be matching. Otherwise, leave as <None>.
  Operation File : this will be completed for you when you save the procedure. There is no need to enter anything here.

- To define the Witnessing Steps (which camera and orientation you will be using and how many barcodes to expect) click the **Add** button and complete the details as shown below and click **Save**.



- Repeat the above step for each camera you will be using in the witness step. If you are using the Pocket Matcher, add another step for each barcode you will be checking as part of that witness step.

17.3. Associating batch items (products) with the procedure

- On the Procedure Edit page, select the 'Add Batch Item' button
- Select the Batch Item Type from the drop down menu, or search for the product (or manufacturer) in the search box
- Select the Batch Item you want to associate with the Procedure
- Select the 'Select Batch Item' button

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- The Batch item will be associated with the Procedure
- Select the ‘Save’ button
- A pop up window will be displayed ‘Do you want to save your changes?’
- Select the ‘Yes’ button
- Your changes will be saved

17.4. Removing a processing step in a procedure

- On the Procedure Edit Page
- Select the Step you want to remove, this will be highlighted with a blue band
- Select the ‘Remove Step’ button
- The Procedure step will be removed
- Select the ‘Save’ button
- A pop up window will be displayed stating ‘Do you want to save your changes?’
- Select ‘Yes’
- The Changes will be saved

17.5. Removing an associated batch item

- On the Procedure Edit Page
- Select the Batch Item you want to remove, this will be highlighted with a blue band
- Select the ‘Remove Batch Item’ button
- The Batch Item will be removed from the procedure
- Select the ‘Save’ button
- A pop up window will be displayed stating ‘Do you want to save your changes?’
- Select ‘Yes’
- The changes will be saved

17.6. Editing an existing procedure

- Log on to Matcher
- Navigate to Tools
- Navigate to Procedure Management
- Single click on the procedure and select the ‘Select Procedure’ button
- Edit the fields in the Procedure Edit screen
- Select the ‘Save’ button
- A pop up window will be displayed ‘Do you want to save your changes?’
- Select the ‘Yes’ button
- Existing procedure will be edited

17.7. Deleting a procedure

- Navigate to Tools
- Navigate to Procedure management
- Select the chosen Procedure Type from the drop down menu
- Single click on the Procedure and select the ‘Select Delete Procedure’ button
- A pop up window will be displayed asking ‘Do you want to delete the Procedure XX’
- Please note this message will be displayed if you have not assigned this Procedure in a Process Map
- Select the ‘Yes’ button
- The Procedure will be deleted
- If the procedure is in use in one of the process maps, you will see a pop up warning stating ‘This procedure is in use in the following process maps : XX’
- Select the ‘OK’ button

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18. Process mapping

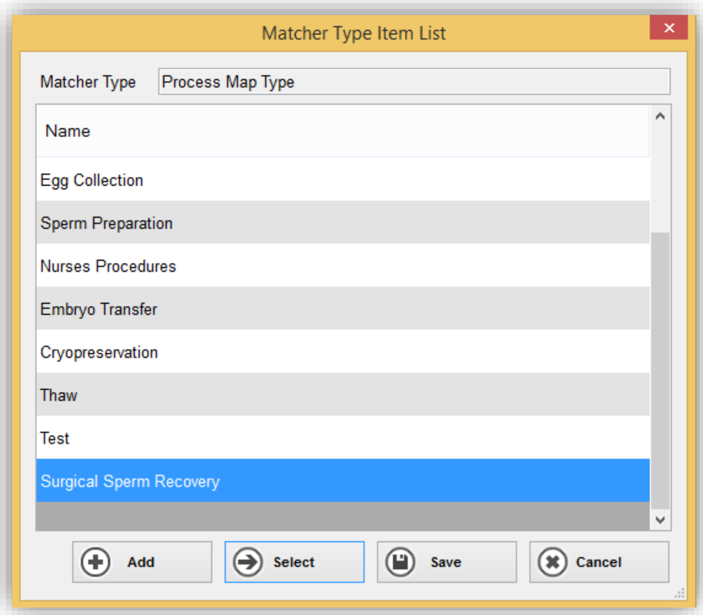
18.1. Process mapping – overview

A process map is a sequence of witnessing steps configured in the order they are normally carried out according to the clinic's standard operating procedures. This forcing function helps to ensure that all of the steps are carried out in the correct order and are not missed out.

18.2. Adding a new process map type

Process map types help you to organise and categorise your process maps. This helps you to easily find the process map you want when witnessing.

- Click **Tools** > **Matcher Type Management**
- Select Process Map Type
- In the Matcher Type Item List click the **Add** button
- Enter the name of the Process Map Type (e.g. Embryo Transfer, IVF, Egg collection)
- Click **OK**
- Click **Save** on the Matcher Type Item List page
- The new Process Map Type will be created



18.3. Editing an existing process map type

- Navigate to the Matcher Type Management in Tools
- Select the Process Map Type and select the 'Select Item' button
- Edit the Matcher Type Name
- Select 'OK'
- Select 'Save' on the Matcher Type Item List page
- The Process Map Type will be edited

18.4. Deleting a process map type

- You are not able to delete Process Map Types.

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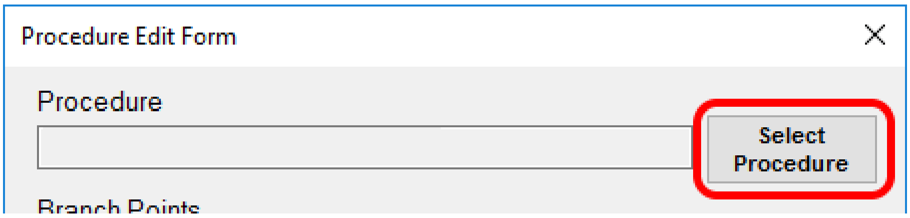
18.5. Constructing a process map

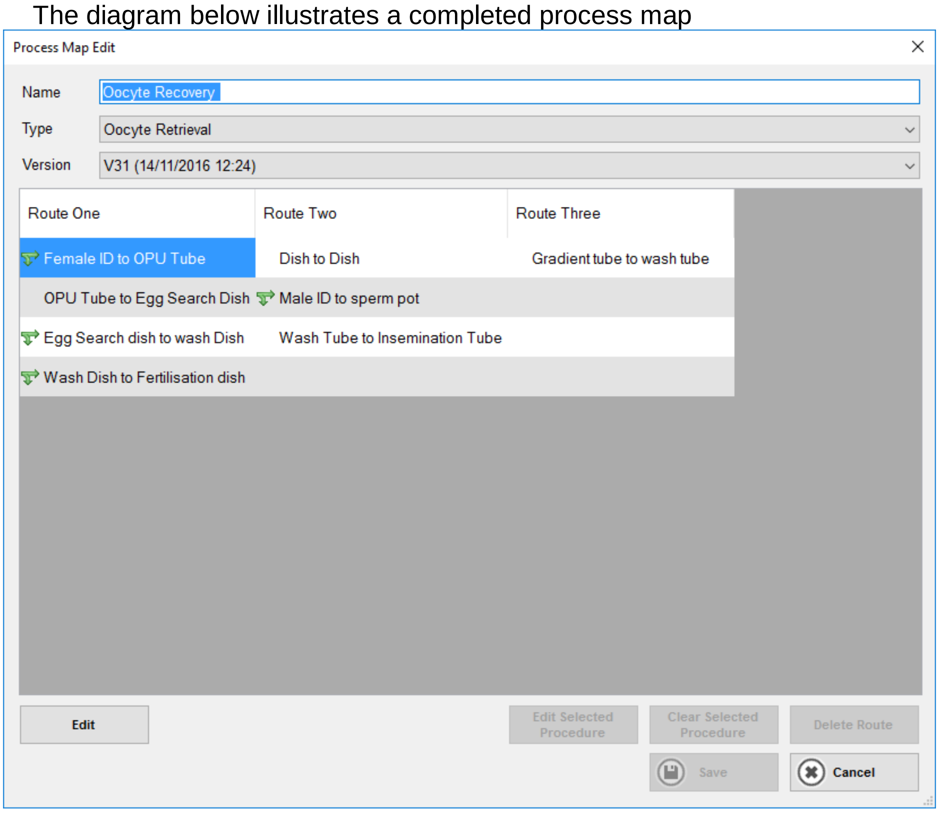
Before constructing your process map, ensure you have set up your procedures (witnessing steps) for your procedure.

- Click **Tools > Process Mapping Management**
- Select the Process Map Type from the drop down menu (this is category you want to add your process map to)
- Click **Add**
  Enter a **Name** for the process map
- Verify the **Process Map Type** from the drop down menu
- To add the first procedure (witness step) to the process map, double-click on the first empty space under Route 1
- Click the **Select Procedure** button:



- Search for the procedure you want to add for that step and click **Select**.
- Repeat for each step of the process working down the route column.
- You can rename the routes if you wish by double-clicking on the Title field (i.e. Route 1) and updating the route name, then clicking **OK**
- Once the process map is complete, click **Save**

- The diagram below illustrates a completed process map



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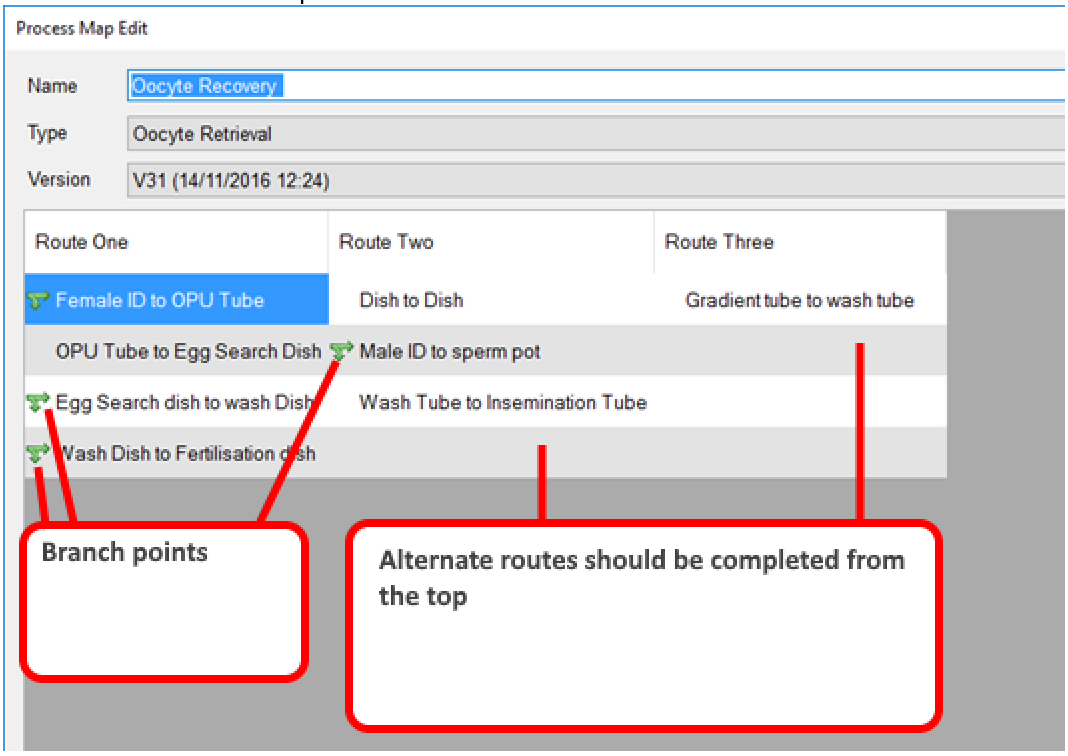
18.6. Adding new routes and branch points

If there are different routes you can take through a process, or deviations, you can create new routes to which you can deviate at certain points.

The points at which you can deviate are called **branch points**.

- To set up a new route, enter witness steps for the alternate route(s) under a separate route column. You should start at the top of the column.



- To set up a branch point (the point at which you can deviate to a different route) double click on the procedure at the point you can deviate. Complete the screen as shown below:

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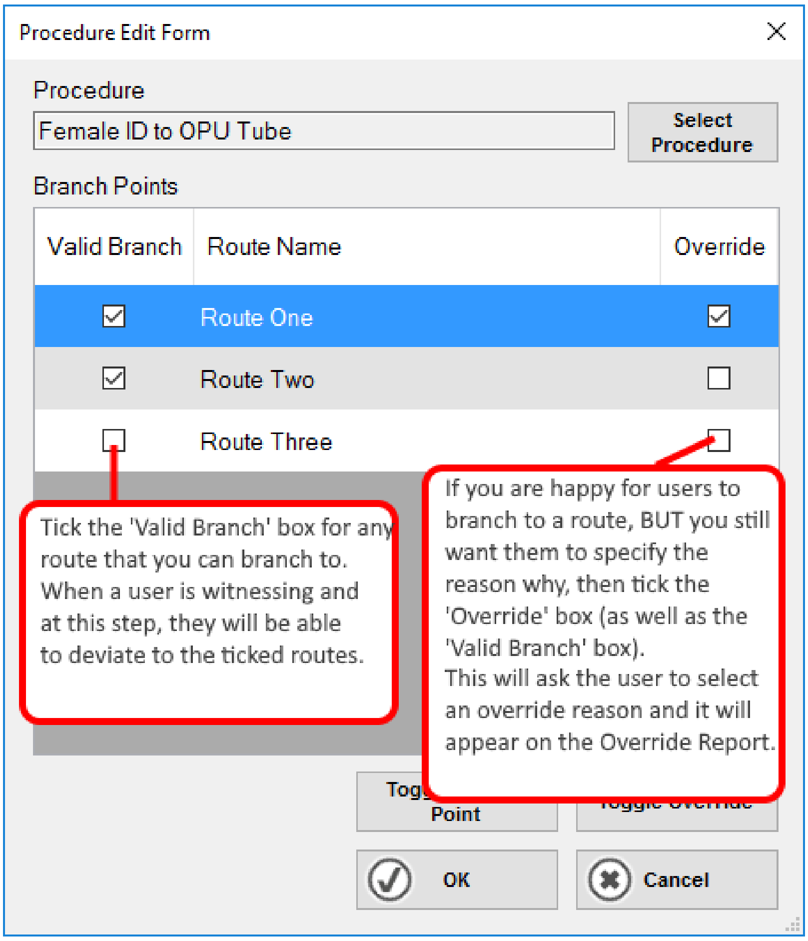

18.7. Editing an existing process map

Each time you edit a process map a new version is created. This means that you have a history of your changes should you need to revert to or check a previous version at any point. When you create a new version, any patients currently on that process map will remain on the version that was in place when they started on that map.

- Click **Tools** > **Process Mapping Management**.
- Select the desired **Process Map Type** from the drop down list.
- Double-click on the Process Map you want to edit – this will open up the process map.
- Select the version that you want to edit from the Version drop down – this will create a new version that will become the current version.
- Click **Edit**
- You can now edit the process map as described in the Constructing a process map and the Adding new routes and branch points sections.
- Note that the new version is **not** saved until you click **Save**.
- Click **Save** to save the new version or **Cancel** to discard your changes.

18.8. Editing witness steps and branch points in a process map

- Follow the steps described above in 17.7 Editing an existing process map.
- To **change a procedure (witness step)**, double click on the witness step and search for and select the new procedure.

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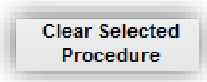
- To **add new branch points**, double click on the step that you want to add a branch point to, select the valid routes for that branch point and click **Save**.
- To **remove a branch point**, double-click on the step containing the branch point, untick all valid routes and click **Save**. This will remove the branch point.

18.9. Clearing a witness step in a process map

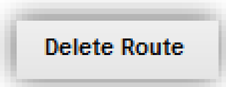
- Follow the steps described above in 17.6 Editing an existing process map.
- Select the witness step to be cleared within the process map.
- Click the **Clear Selected Procedure** button



- Once all the edits have been made, click the **Save** button

18.10. Deleting the entire process map route

- Follow the steps described above in 17.6 Editing an existing process map.
- Click any witnessing step in the route you want to clear
- Click the **Delete Route** button



- The whole of that selected route will be deleted

18.11. Deleting a process map

- Click **Tools** > **Process Map Management**
- Select the relevant Process Map Type from the drop down menu
- Select the process map to be deleted
- Click **Delete**
- A pop up window will be displayed asking ‘Do you want to delete process map?’
- Select the ‘Yes’ button

Note that deleting a process map will not affect any patients currently on that process map – they will be able to continue using it until the end.

19. Reports administration

19.1. Configuring administration and cycle reports

- On installing the Matcher system, you will also need to ensure you have the Crystal report installer
- This will be completed as part of the installation process
- Navigate to Tools
- Select ‘Settings’
- Select ‘Report Path’
- Ensure the Report Path is correctly pointing to the location of your reports that have been installed on your PC

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- Select ‘Save’
- Navigate to Tools
- Select ‘Reports’
- Check each of the reports has a title that is clear and relevant to the report in the Report File Name
- Ensure the location of your reports is stated in the ‘Report Location’ field
- Select ‘Close’ to close down the Reports section

19.2. Adding reports

- Navigate to Tools
- Select ‘Reports’
- Select ‘Add’ button
- Add the report details

  - Name
  - Report File (Select from the Directory which should be directed to the Crystal Report folder)
  - Add description if required
  - Report type – choose from the drop down menu
  - Report Location – choose where you want this report to be displayed

- Select the ‘Save’ button
- Select the ‘Close’ button
- Your report will be created and saved

19.3. Editing report names

- Navigate to Tools
- Select ‘Reports’
- Click on the report you wish to edit and select the ‘Edit’ button
- The report details will be displayed
- Edit the report name and select ‘Save’
- The report name will be edited

19.4. Deleting reports

- Navigate to Tools
- Select Reports
- Click on the report you want to delete
- Select the ‘Delete’ button
- A pop up window will be displayed stating ‘You are about to delete the report XXX, click OK to proceed’
- Select the ‘OK’ button
- The report will be deleted
- Select the ‘Close’ button on the Reports page

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20. User management

20.1. Adding a user

- Select User Management in Tools
- Select the ‘Add’ button
- Create a Logon ID
- Create a User Name
- If you want the User to have administration access, tick the Administrator tick box otherwise leave blank
- Select the Enabled tick box to activate the User
- Select the ‘Save’ button
- An Enter Password pop up screen will be displayed
- Create a New Password (must be 8 characters in length and have 3 character types)
- Confirm Password and select the ‘OK’ button

20.2. Selecting a user for editing

- In the User List, to change the User name, Administrator access or Disable the user, select the ‘Select’ button
- Make the changes required
- To change the password, select the ‘Change Password’ button
- Create a New Password (must be 8 characters in length and have 3 character types)
- Confirm Password
- Select the ‘OK’ button
- Select the ‘Save’ button to save all changes made
- A pop up window will be displayed to confirm you want to save the changes
- Select the ‘Yes’ button

21. Donor type management

21.1. Edit item

- Select Matcher Type Management in Tools
- Select ‘Donor Type’ from the Matcher Type List
- Select the ‘Select’ button
- Select Donor type to Edit name and Maximum Instances
- Select the ‘OK’ button

21.2. Add item

- Select the ‘Add’ button
- Create a Name of the Item you want to Add
- Create a Number of Instances for this item
- Select the ‘OK’ button
- Select the ‘Save’ button on the Matcher Type Item List
- Select the ‘Close’ button on the Matcher Type List

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22. Customising patient ID cards

22.1. Adding a new clinic logo on patient ID cards

- Select Settings in Tools
- The Settings Edit window will be displayed
- Select the Id Card Clinic Logo File
- Change the Value to be the location on your Benchtop where you are storing the Clinic Logo
- Select the ‘Save’ button

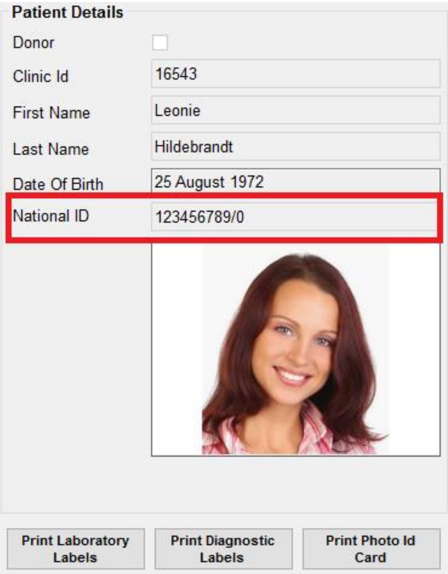
22.2. Editing the clinic logo and name

- Select the ID Card Clinic Logo File on the Settings Edit page
- Edit the Name
- Edit the location of the Clinic Logo file in the Value field
- Select the ‘Save’ button

22.3. Adding the National ID number (or similar) to photo ID cards

If Matcher has been configured at your clinic to use the ‘National ID’ number field, this can be added to photo ID cards. This field may be called something slightly different at your clinic but is designed to record a national ID number, passport number or similar.

If it has been enabled, it will display on the Patient Details form (see below).



To display this field on the ID cards (you may need an Administrator account rather than a standard user account):

- Click **Tools** > **Settings**
- The Settings Edit window will be displayed
- Select ‘Display Person Custom Text01’ from the list and click the **Select** button
- In the Value box, type ‘true’
- Click **Save** and then click **Save** again on the Settings Edit

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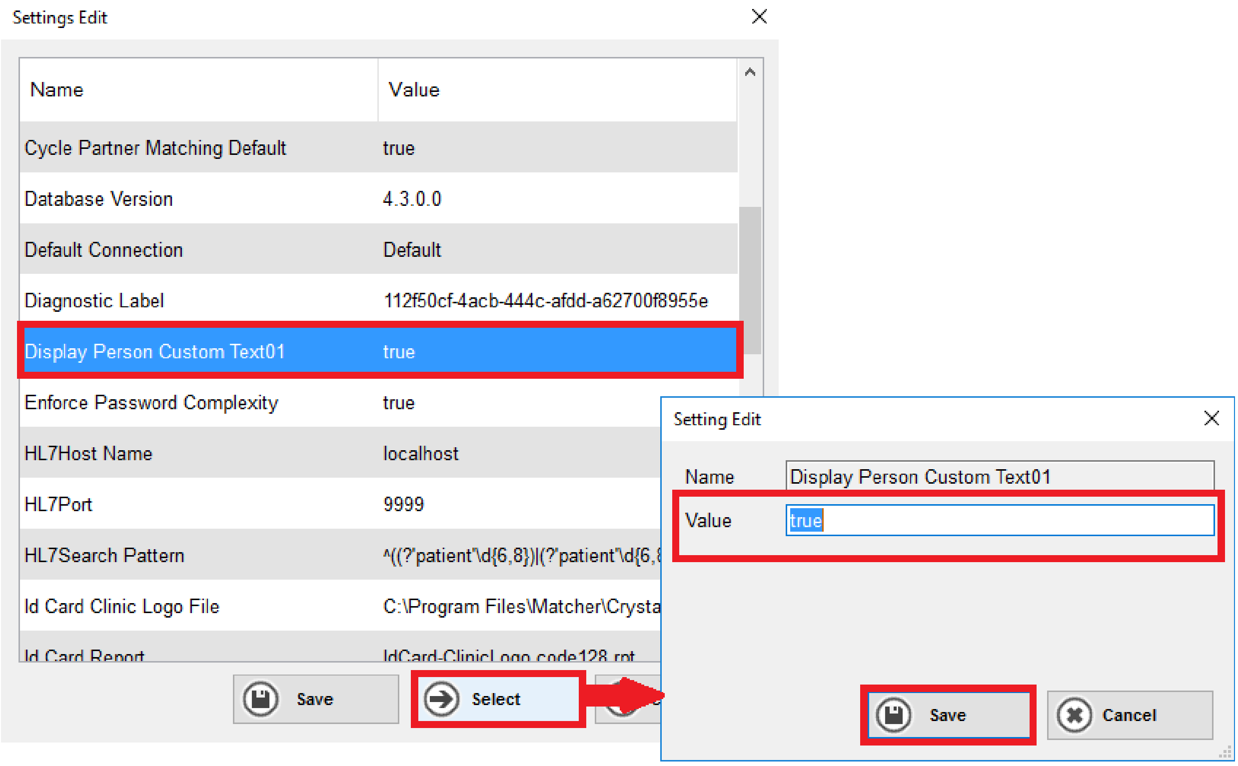

The National ID number will appear on the ID cards in the format shown below:

23. Password management

23.1. Non administrative users

- Select ‘User Management’ in Tools
- Select ‘Change Password’
- Type in the Old Password
- Type in New Password
- Confirm New Password
- Select the ‘OK’ button

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23.2. Administrative users

- Select ‘User Management’ in Tools
- Highlight User
- Select the ‘Select’ button
- Select the ‘Change Password’ button
- Type in New Password
- Confirm New Password
- Select the ‘OK’ button
- A Password Changed pop up window will be displayed stating ‘The Password has been changed’
- Select ‘OK’ button
- Select the ‘Save’ button on the Edit User screen
- Further Save Changes pop up window will be displayed stating ‘Do you want to save your changes?’
- Select the ‘Yes’ button
- The changes will be saved

24. Replacement toners and consumables

24.1. How to replace toners or ID card dye film

- To order replacement Toners from Matcher please email Matcher@imtinternational.com,
- Follow the instructions on the Printer, Toner box or Dye Film box.

24.2. How to replace ID card cleaning kits and ID photo cards

- To order replacement ID and Cleaning Kits from Matcher please email Matcher@imtinternational.com,
- Follow the instructions that come with the ID Card Cleaning Kits
- Matcher can talk you through the process or you can see the instructions by selecting the link here http://www.evolis.com/sites/default/files/atoms/files/userguide_ku-zen1-038-eng-a1_1.pdf

24.3. How to replace label sheets (non-cryo) and label sheets (cryo)

- To order replacement non-cryo and cryo label sheets from Matcher please email Matcher@imtinternational.com,

25. Using LogMeIn remote access

LogMeIn is a tool that the Support Technician’s use to remotely access computers in the clinics to help resolve any issues. The Matcher support Engineer will use LogMeIn to assist them.

If LogMeIn is not installed on the PC, LogMeIn Rescue is a safe and secure way for our Technician’s to access your PC and it will automatically close down after the session. All communication between you and your support technician is SSL-encrypted.

- Your support Technician will send you an email from LogMeIn

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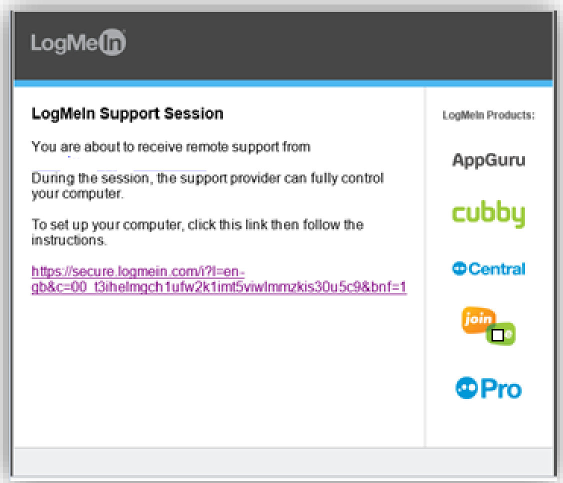
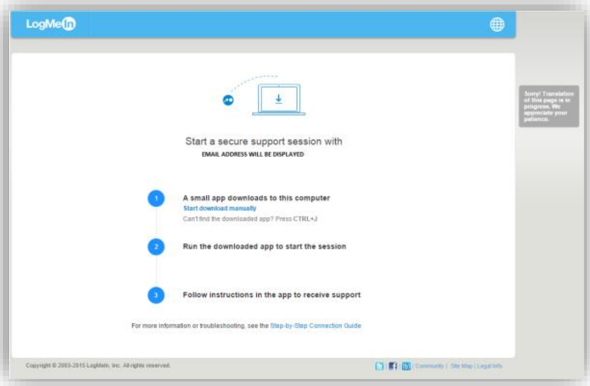
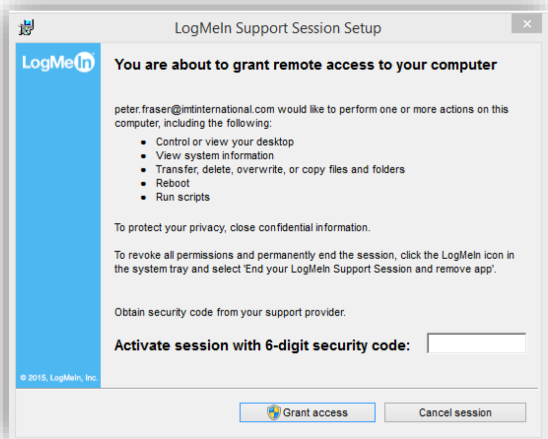


- Select the unique link i.e. (https://secure.logmein.com/i?l=en-gb&c=00_t3ihelmgch1ufw2k1imt5viwlmmzkis30u5c9&bnf=1)

- You will receive a page which displays the download of the App and the 3 steps you need to follow



- Select the Hyperlink 'Start download manually'
- The LogMeIn.msi will be downloaded, select the download, this screen will be displayed



- The Technician will advise you of a 6-digit code
- Type in the code in the box labelled 'Activate session with 6-digit security code'
- Select the 'Grant access' button
- You will see a notification that your computer is ready for the Support Session

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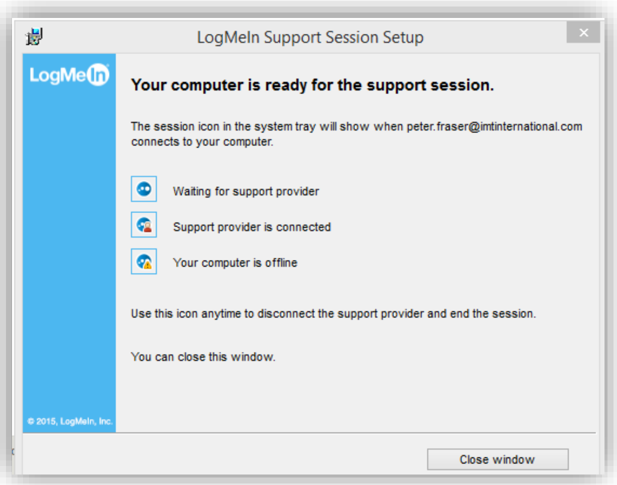


- You will then see a notice at the top of your screen advising ‘LogMeIn – Remote Session’

- This indicates that the Support Technician has now created a remote session to your PC and can view what you are seeing.

26. Using TeamViewer remote access

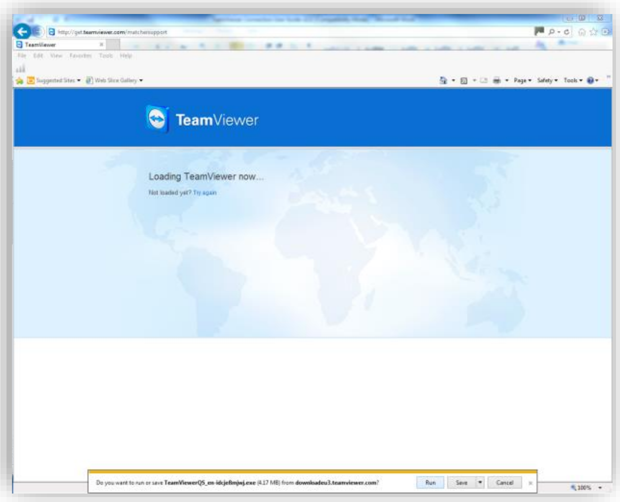
Team Viewer is another Remote access connection system that our Support Technicians use to remote into your PC’s.

TeamViewer is safe and secure. All communication between you and your Support technician is encrypted with an RSA public/private key exchange and AES (256Bit) session encoding.

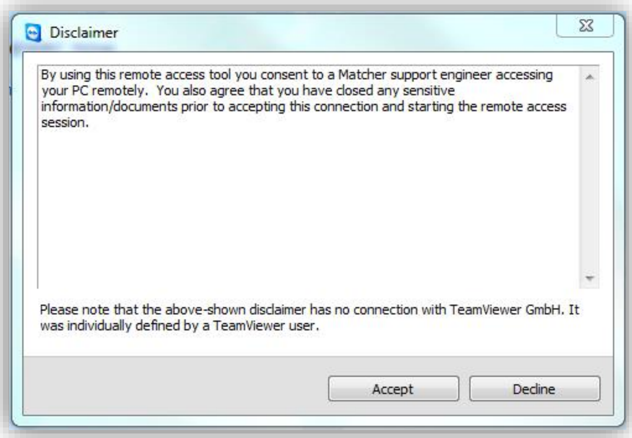
Important: The applet is a small program that must run on your computer for the technician to be able to help you. The applet is automatically removed from your PC or Mac at each session end.

- Open your web browser and go to ‘**get.teamviewer.com/Matcher**’ (do not use ‘www.’). You will be asked to ‘Run’ or ‘Save’ the TeamViewer applet.

- Click **Run** to download the applet.
  The applet download should take about 15 to 30 seconds depending on your internet speed

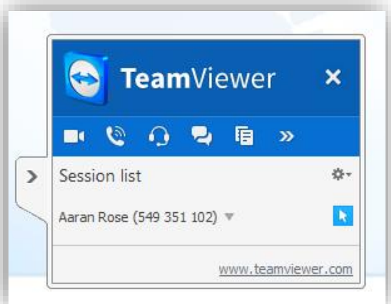


- Once the download has finished you will be presented with a disclaimer, if you are happy with this click **Accept** to continue to the application.

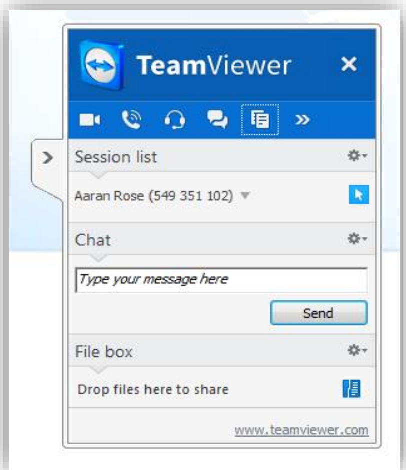


- You will be presented with a window with an ID number and password. You will need to provide this information to your Matcher technician in order for them to remotely connect to your PC.

- Once the Matcher technician has entered the information you provide them, the remote access session will be started, and a window will appear on your screen.



- You can click on the icons within the window to communicate with the Matcher technician



- You may be asked to give the technician permission to perform certain actions.
- Click ‘**Yes’** to grant permissions, or ‘**No’** to deny.
- You can close the remote access session at any time by clicking the **X** in the top right corner of the window.

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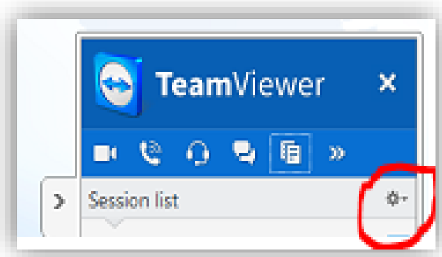
- When the remote access session is over and you close the application your Support technician will no longer have access to your machine, because the application is not installed on your system.

- You will need to repeat this process every time you require remote assistance.

26.1. What can you do during a TeamViewer session?

Exact capabilities may vary according to TeamViewer settings on the Support technician's side.

- Chat with the technician(s)
- View a detailed session log
- Allow or deny the technician the right to perform certain actions
- Send individual files to a technician
- Change the display font size
- Revoke permissions, such as remote control or file management, from the technician by clicking the wheel on the right hand side of the Session list



27. System administration & configuration

27.1. System configuration – overview

This section investigates the System configuration of the Matcher system. To enable you to see all the administrative options, you need to be logged in with Administrative access.

- The System Administration will only be available to Users with Administration Access, therefore there is a separate document available detailing the System Administration Tasks.

- Please contact Matcher@imtintertainal.com for this documentation or telephone our support team 0n +44 1829 771 327

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28. Troubleshooting

Error	Solution
	New Patient Registration
Picture blurred on screen	• Retake photo by clicking on Patient or Partner capture window • Focus webcam by turning lens at front of camera
Run time error xx	• Close Matcher • Try again • If you get the same error message, call IMT International Ltd on +44 1829 771 327
	Printing labels
Nothing prints from the printer	• Check the printer is turned on • Check the USB/network cable is connected securely to the printer and computer • Reboot the PC
Label prints are askew	Ensure the Paper guides are clean (free from glue) and pushed firmly to label width
Label prints are misaligned	Adjust the alignment by: • Open Matcher • Click Tools • Click Label Alignment guide • Select the Label Type by selecting them from the drop down list • Select Print Alignment Guide • A label sheet with a Graticue will be printed • Calculate the adjustment required • Set the Adjustment by increasing or decreasing the left and top margin as required (Graticue Unit is mm) • Print alignment guide again • When adjusted successfully, close.
Run time error xx	• Close Matcher • Try again • If you get the same error message, call IMT International Ltd on +44 1829 771 327
	Matcher Benchtop start up/witnessing/batch tracking
Password not being accepted	• Check that you have entered a password that matches the password validation • Try again • If you get the same error message, call IMT International Ltd on +44 1829 771 327

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Camera error: no cameras detected	• Go into Tools • Navigate to Witness Device Management • Ensure the Matcher Device has 3 Green Arrows  • If there are no arrows, disconnect the USB cable • Re-connect and try again
Cameras have stopped working	• Power off the Matcher Device by removing the power cable and re-connect it. • If this does not resolve the issue, please contact your Matcher Support Engineer.
Pocket Matcher – start up/witnessing/batch tracking	
A blank screen	• Tap screen • Switch on • Pocket Matcher may have lost charge : - Place device on charge - Make sure a light appears
Remaining at Connecting or No connection to Matcher Server	• Click Exit or Cancel • Ensure that the PC or server running the Matcher service is switched on 1. If not, switch the PC or server on. • If this does not resolve the issue restart the service, this can be done by our Support Engineers or your local IT team.
Storage memory is critically low	Clear memory by: • Exit the Pocket Matcher • Click Start • Click Settings • Click Systems Tab • Click Memory • Click the Running Programs Tab • Click stop all • Click OK • Click X to close settings

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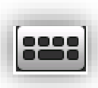
The Pocket Matcher is freezing or error message cannot be cleared	• Complete a soft reset of the device by selecting the silver power button at the top of the Matcher Handheld device, holding down for 4-5 seconds  Select the Soft Reset button 
Cannot load imager	• Ensure the handheld device is fully charged • Press reset button 5-10 seconds
Barcodes are not recognised	There are various reasons why the barcodes may be unreadable, please contact your Matcher Support Engineer.
Process mapping using the Pocket Matcher	
Manual barcode entry	• Ensure the dish/tube is presented to the correct camera • Re-position the dish/tube and retry • Scan I of 2 will be displayed • Take photo of dish/tube • Manually type in the Patient code using the keyboard icon on your Pocket Matcher  • Select ‘Accept’ • Scan Item 2 of 2 by taking picture of dish/tube • Manually type in the Patient code using the keyboard icon on your handheld device • Select ‘Accept’ • Barcode will be manually entered and accepted
Overriding procedures	• After selecting your Operation (Witnessing) • Select your patient • Select Witness • Select Process • Select Procedure (active procedures are highlighted in Blue)

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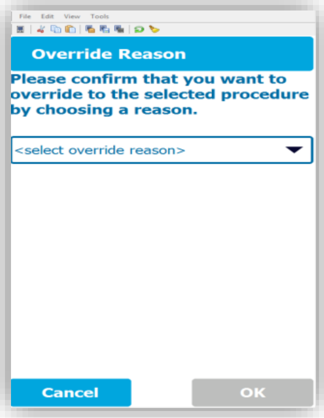
	• If this procedure is not the current selected procedure for this Process (or a valid branch), a pop up window will be displayed  • Select an Override Reason and Select 'OK' • You will now be ready to witness
Touchscreen	
The touchscreens do not appear to be calibrating	Using the calibration tool you will need to re-collaborate the settings for the touchscreen
System & database failures	
A component is failing	Please call IMT International Ltd on +44 1829 771 327 or email us at Matcher@imtinternational.com We will send you a replacement to exchange the component or we can schedule in a visit to replace it.
The patient management system/EMR failing	Initially consult your Patient Management System Support team or your local IT support team. The patients can be input into the Matcher manually whilst this is being resolved.
The WIFI network has low outage	You will need to determine if your WIFI is supported by Matcher. If Wi-Fi is supported by matcher, we can troubleshoot remotely at first then schedule a site visit if required. If you are unsure please call IMT International Ltd on +44 1829 771 327 or email us at Matcher@imtinternational.com
The whole network is down	Contact your local IT department, if there is a fault with the Matcher supply desktop switches, Matcher will replace these.
The electricity outlet is not available	Contact your local Facilities team and advise them of the problem, this would affect all of your devices that are connected to the Electric point.
Further help & assistance	
I need assistance in completing the System Administration	A further User Manual for System Administration is available, please call IMT International Ltd on +44 1829 771 327.

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I require training on Matcher	Please call IMT International Ltd on +44 1829 771 327
I cannot find answers to my issue	There are Help Guides displayed in the Help Section of the Matcher system under Online Training. If you still cannot see an answer to your issues, please call IMT International Ltd on +44 1829 771 327
Request a change in the functionality or a change in the reports	You can request a change to the functionality of the Matcher system or the reports or by telephoning IMT International Ltd on +44 1829 771 327

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United Kingdom