Matcher Version 4.5 – April 2017
Release Notes

Overview – what is this release for?

This release provides enhancements to functionality in a number of areas. We have a new cryo label sheet available that includes PCR tube labels for PGS/PGD. There is a new customisable patient list as well as changes around the way you open new cycles to make the system more intuitive. We have made some changes to the No Match result screen to improve auditability and make 'no matches' clearer. We have also implemented updated functionality to allow partners to be imported from a linked Patient Management System where the patient is already in Matcher (and vice versa). There are also several other changes and minor fixes which are detailed below.

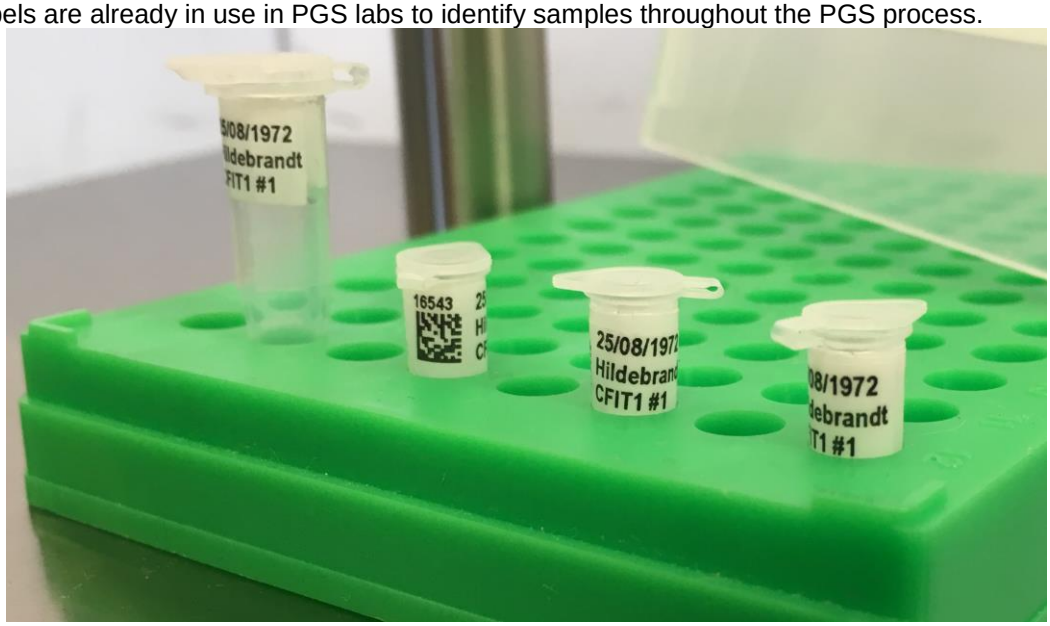
This is an update to the Matcher PC application, Pocket Matcher application and database.

What is included in this release?

1. PGS labelling
2. Updated patient list
3. Updated cycle types
4. Updated 'No Match' screen
5. Enhancements to patient import facility for patient couples
6. Updated Pocket Matcher witnessing images
7. Custom patient ID field on Pocket Matcher
8. Improved error handling
9. Ability to archive / remove 'Matcher Types' (drop-down list options)
10. New override reports
11. Various other small changes and minor fixes

1. PGS labelling

Developed with PGS labs, we have a new cryo label sheet available containing PCR tube labels (in addition to the standard straw and vial labels). These curved labels (to fit tapered PCR tubes) are suitable for 0.2µl and 0.5µl tubes and are self-laminating. The labels contain a 2d barcode and patient / item information. These labels are already in use in PGS labs to identify samples throughout the PGS process.



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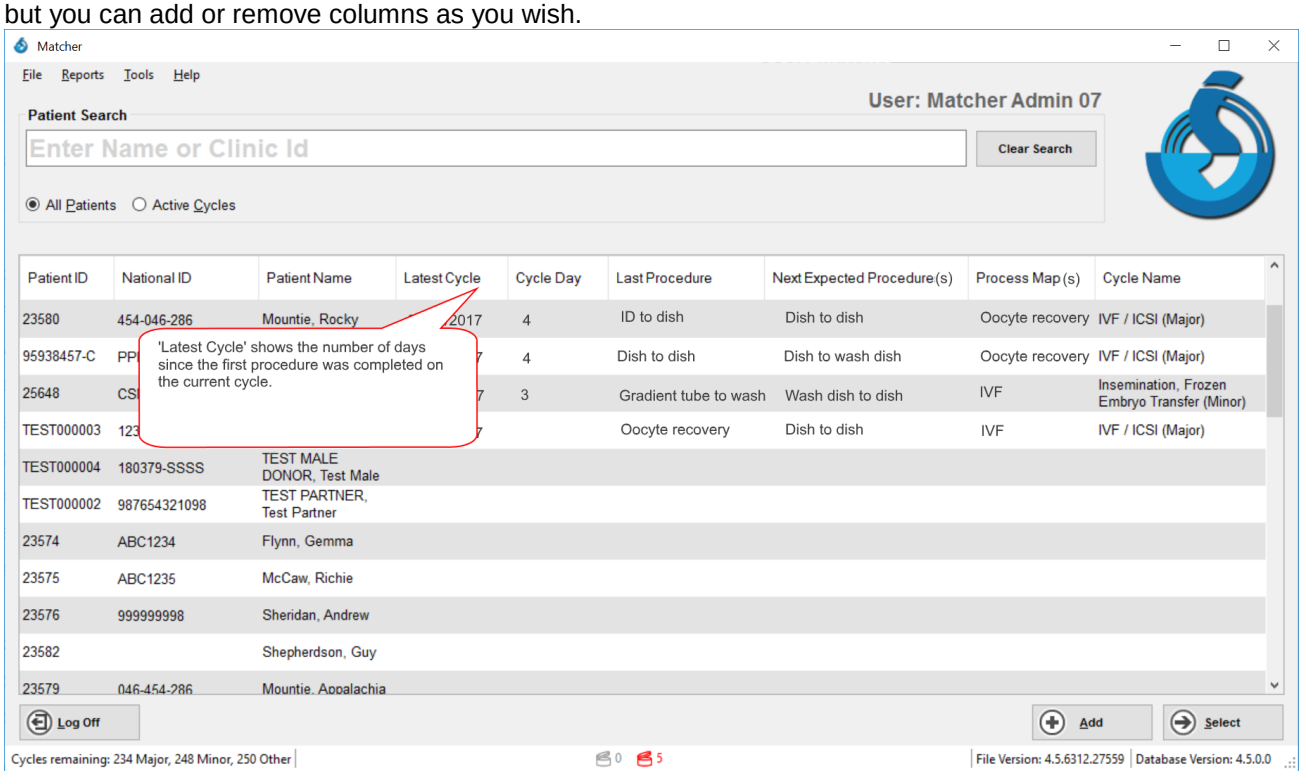
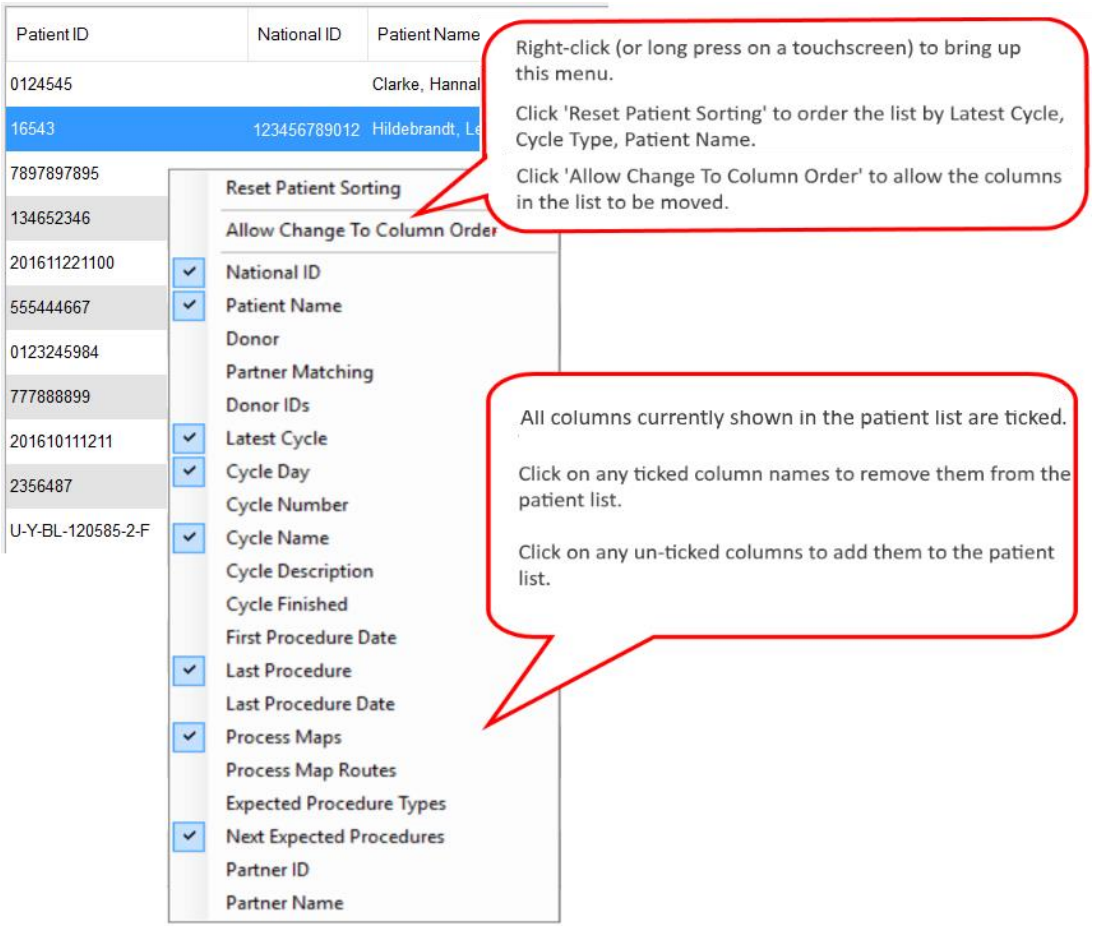
2. Updated patient list

We have made some changes to the patient list screen to allow you to **customise the information you see** – you can view information such as the **last procedure performed, the next procedure(s) due, the number of days since the cycle started (i.e. number of days since the first procedure)** etc. You can also remove information that you don't need.

We have set the default view to show the columns that we think would be most useful for you (see below), but you can add or remove columns as you wish.

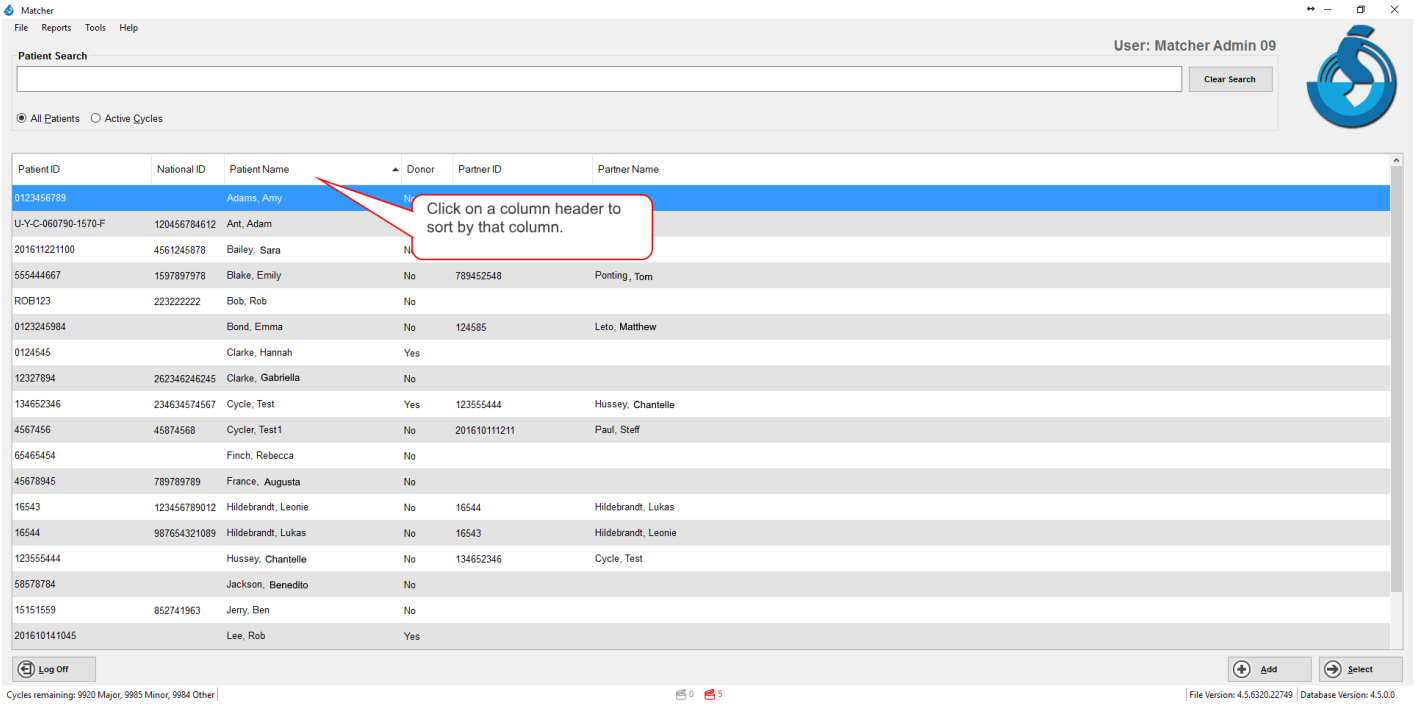


To add or remove columns, right click on the patient list as shown on the following page.



Any changes you make to the patient list are specific to each PC/Windows user account so you can have a different view in the office where you may need to see different information compared to the lab.

An alternative layout, which may be useful for a reception or administration machine showing whether the patient is a donor and also the patient's partner details is shown on the next page:

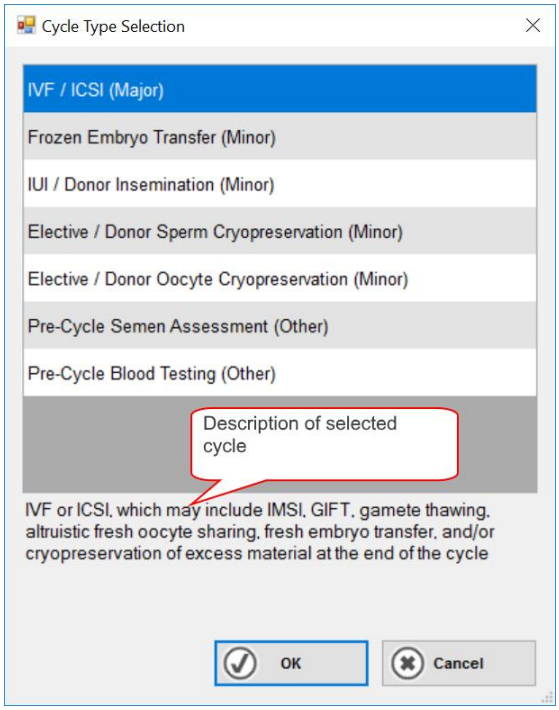


As you can now see more 'live' data on this screen, we have set it to refresh every minute, but you can increase this time period if you wish (via **Tools** > **Settings** > **Patient List Refresh Rate**).

There is also a small update to the Pocket Matcher patient list whereby you will now see patients with the most recently added cycles at the top of the list.

3. Updated cycle types and descriptions

We have updated the cycle types available to make the system more intuitive and easy to use. The cycle types now match the terms that you use in the clinic, such as IVF/ICSI. The new cycle types available for selection are shown below:



When you select a cycle type, you will also see a further description as shown on the left.

Good to know…

The pricing of cycles is not changing. This change is to make it easier to understand which type of cycle to select using terminology most familiar to you.

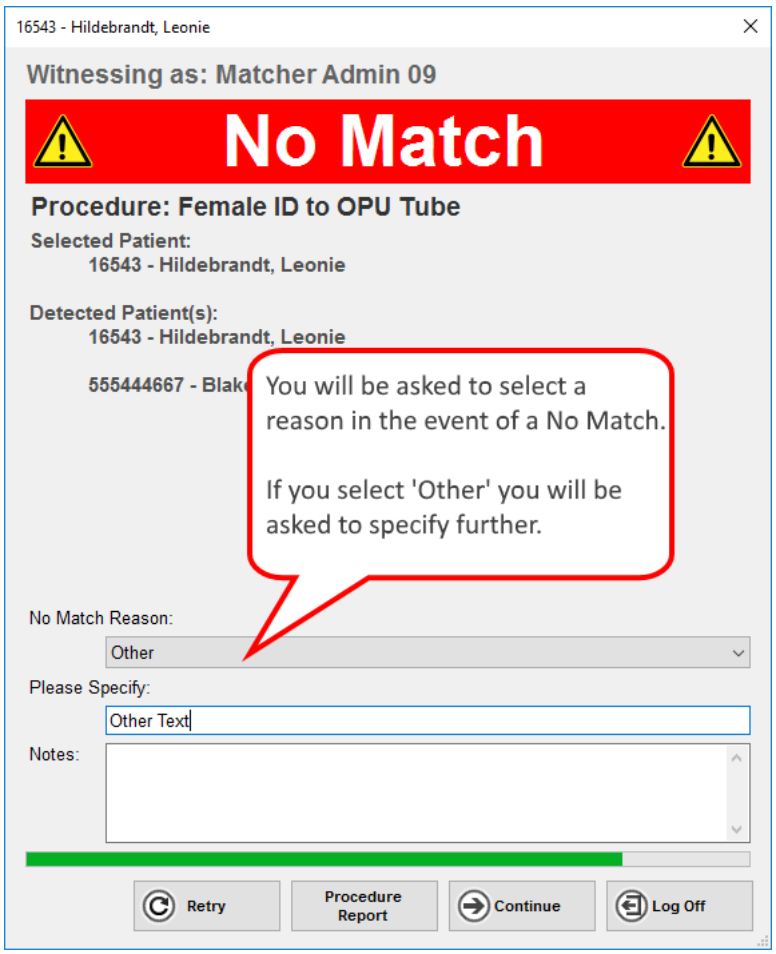
If we have previously set up different cycle types for you, we will ensure these are kept in place.

4. Updated ‘No Match’ result screen

We have made some changes to the ‘No Match’ result screen, both to make the ‘No Match’ result clearer and to improve auditability.

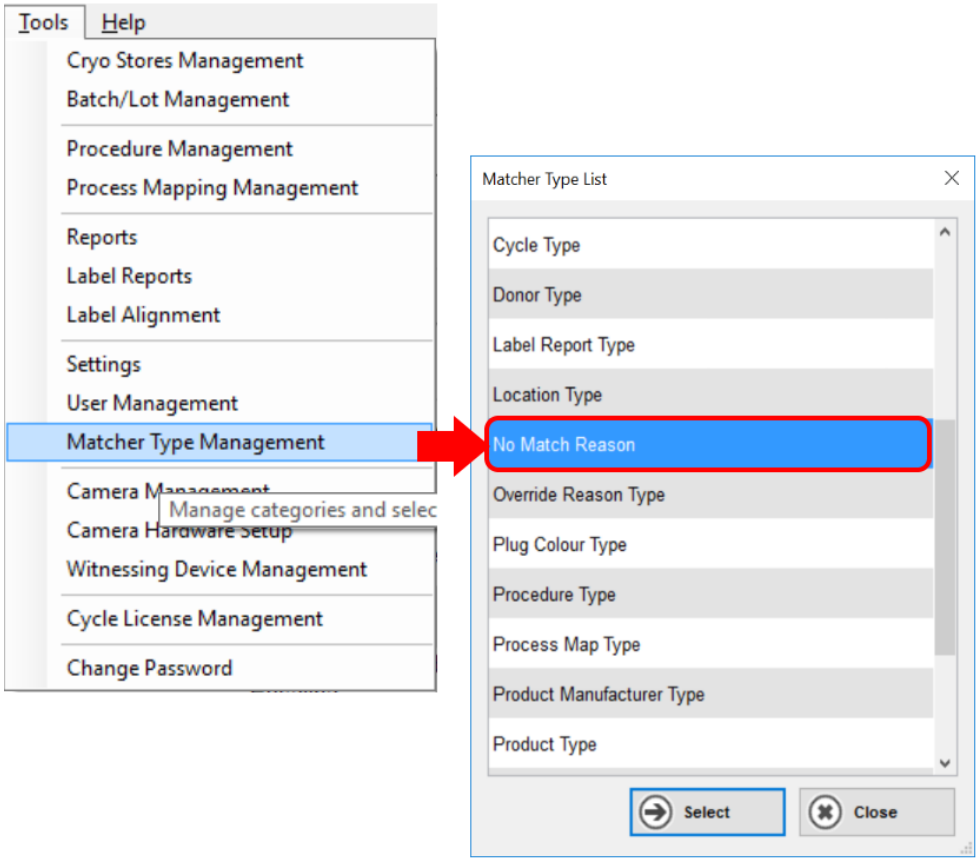
In the event of a No Match result, you will now be asked to select a reason for the No Match. This makes it easier for anyone using touchscreens in particular to select a reason from a pre-defined list, and helps you with root-cause analysis.

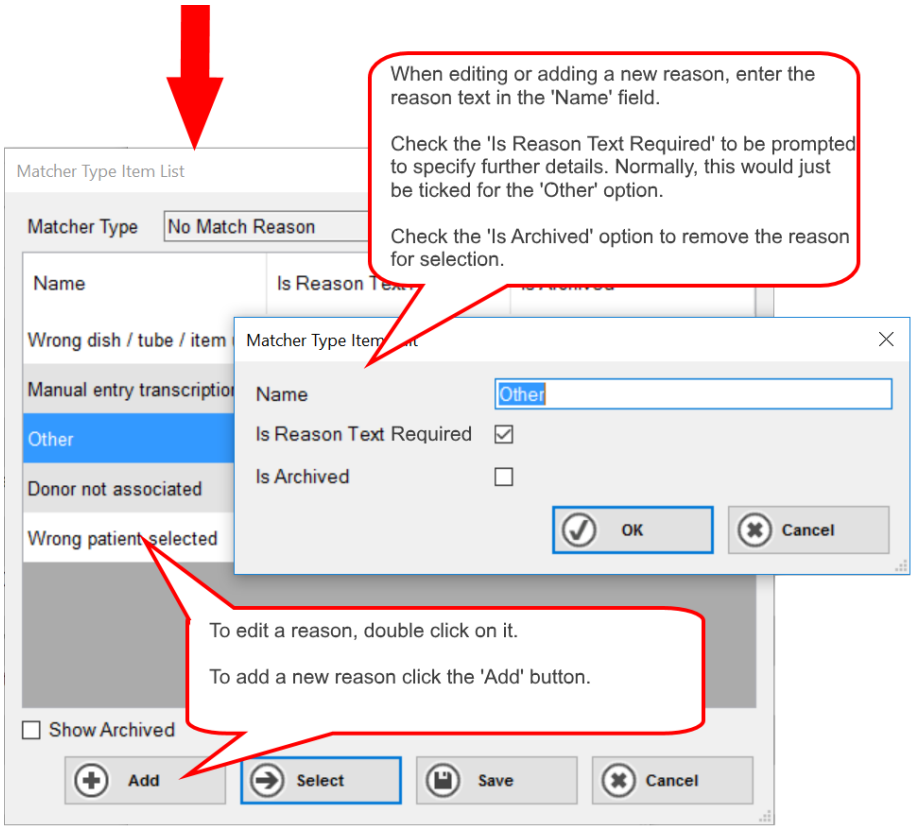
We have also updated the screen to make the No Match more obvious.



This list, as with the contents of all Matcher drop-down lists, is configurable to your clinic so that you can define your own reasons to fit in with the way that you work, although we provide an out-of-the-box list that covers the main reasons.

If you are set up as an administrator, you can update the list for your own clinic. To do this, go to **Tools** > **Matcher Type Management** > **No Match Reason** as shown on the next page.


Tools
Help
Cryo Stores Management
Batch/Lot Management
Procedure Management
Process Mapping Management
Reports
Label Reports
Label Alignment
Settings
User Management
Matcher Type Management
Camera Management
Manage categories and selec
Camera Hardware Setup
Witnessing Device Management
Cycle License Management
Change Password
Matcher Type List
Cycle Type
Donor Type
Label Report Type
Location Type
No Match Reason
Override Reason Type
Plug Colour Type
Procedure Type
Process Map Type
Product Manufacturer Type
Product Type
Select
Close


When editing or adding a new reason, enter the reason text in the 'Name' field.
Check the 'Is Reason Text Required' to be prompted to specify further details. Normally, this would just be ticked for the 'Other' option.
Check the 'Is Archived' option to remove the reason for selection.
Matcher Type Item List
Matcher Type
No Match Reason
Name
Wrong dish / tube / item
Manual entry transcription
Other
Donor not associated
Wrong patient selected
Matcher Type Item
Name
Other
Is Reason Text Required
Is Archived
OK
Cancel
To edit a reason, double click on it.
To add a new reason click the 'Add' button.
Show Archived
Add
Select
Save
Cancel

5. Enhancements to import facility for patient couples

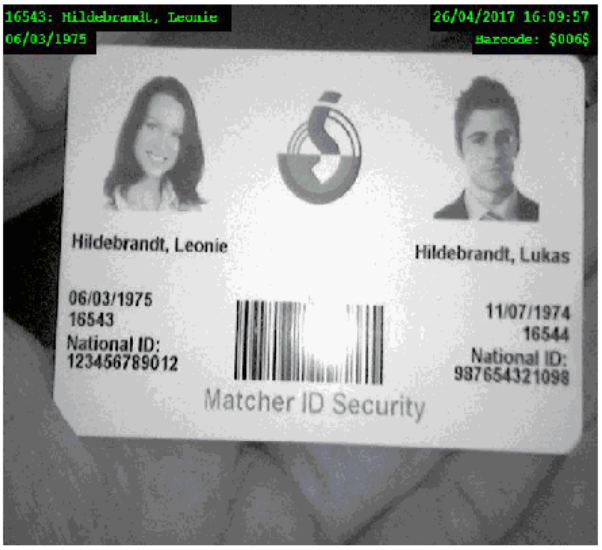
We have updated the import facility to allow you import a patient or partner from a source patient management system where one of the couple is already in the Matcher database. Previously, if one of the couple was already in Matcher, the other would have to be added manually.

6. Updated Pocket Matcher witnessing images

We noticed that in some cases the text stamp on Pocket Matcher witnessing images could potentially obscure some of the image. We have therefore updated the images to maximise the image space. This is shown below:

Old

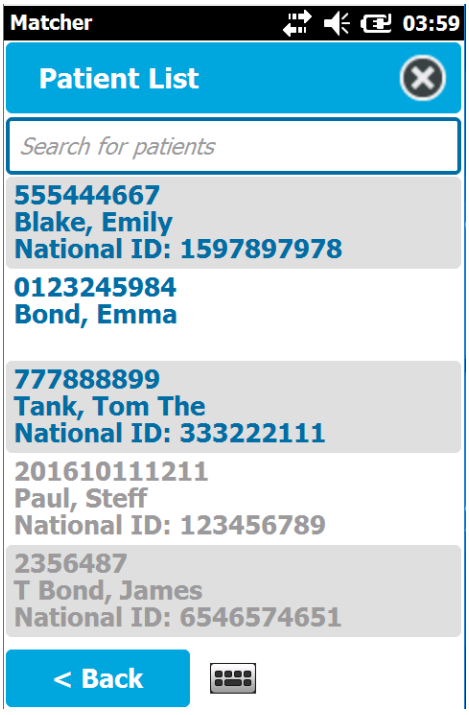
New



7. Custom patient ID field on Pocket Matcher

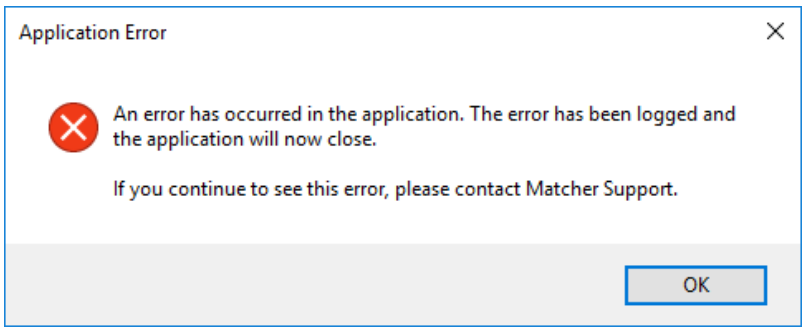
Where you have the custom patient ID field enabled for patients (this is an additional field that some clinics use to hold a National ID, Passport number or similar), this is now available to view and search on the Pocket Matcher.

If you do not use this field and would like to, please see the Matcher User Guide, or contact our Support Team who will be happy to help you enable the field for use.



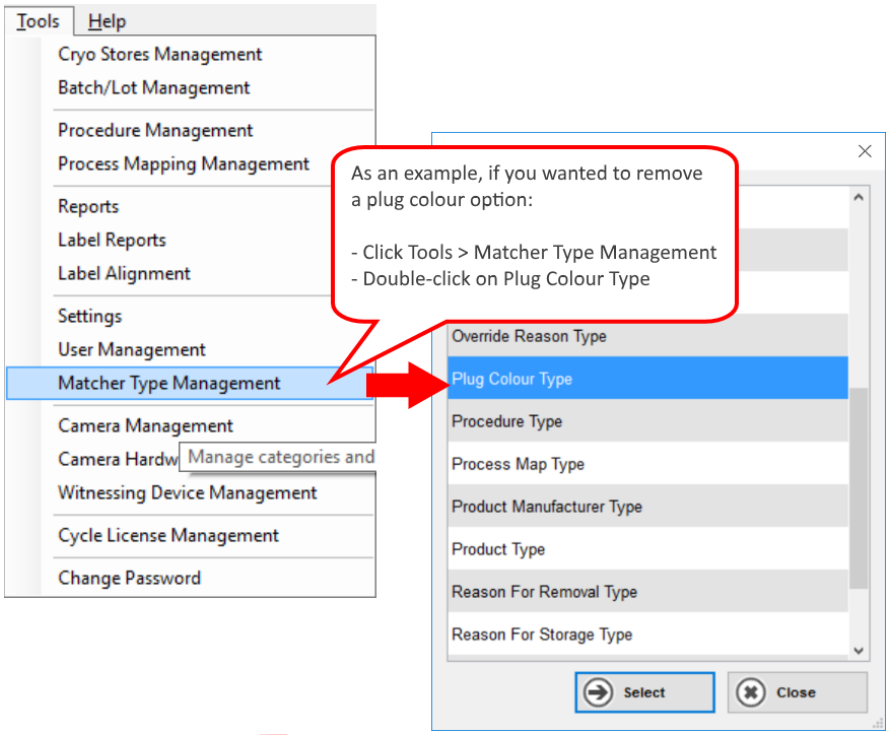
8. Improved error handling

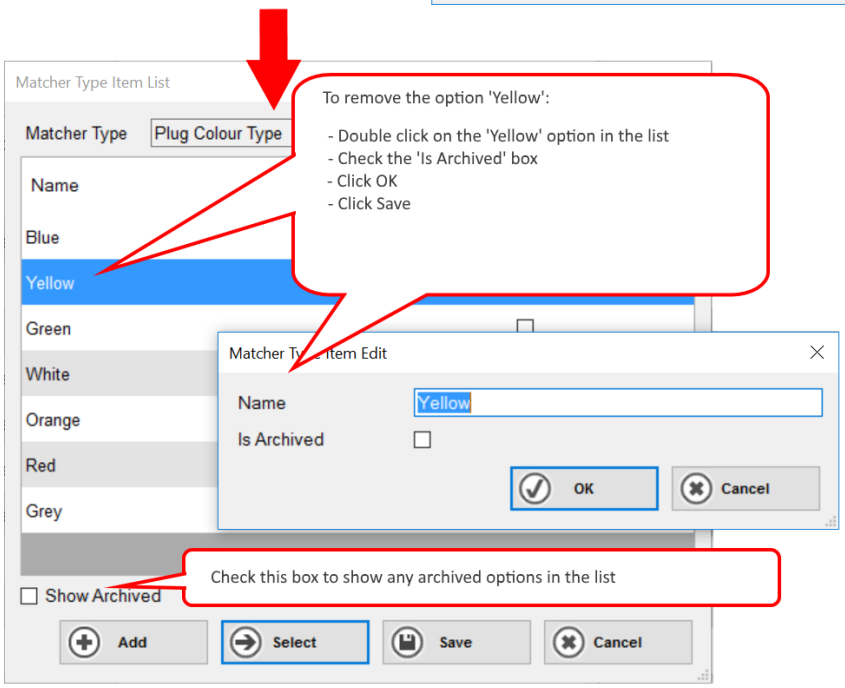
In the unlikely event that you encounter an error when using Matcher, you will now see a friendly message, rather than a system message.



9. Ability to archive / remove 'Matcher Types' (drop-down list options)

The values in all drop-down lists in Matcher can be controlled through Matcher Types (accessible through **Tools** > **Matcher Type Management** for administrators) allowing you to customise Matcher for your own clinic. We have now added further flexibility by allowing these values to be archived, meaning the value can no longer be selected, but any previous selections of that value remain, and can be viewed in reports and summary lists. See diagram on the next page.





10. New override reports

We had become aware of a few scenarios in which the override reports (for a specific patient/cycle and all patients) were not displaying as expected. We have updated these reports with new versions displaying correctly in all scenarios and updated the layouts slightly to improve usability.

11. Various small changes and bug fixes

(a) Fixed various minor label report layout issues.
(b) Fixed various issues and enhanced functionality on the **Patient** > **Cryo** page. For example, you can now add multiple batches/lots of items.
(c) Updated functionality to ensure all reports have descriptive tooltips.
(d) Fix to Batch/Lot Summary Report to ensure images always displayed.
(e) Enhanced functionality to ensure new batch/lot items default to correct category.
(f) Standardised placement of buttons, including Close and Delete buttons.
(g) Fixed an issue with the process map search facility.
(h) Added specific Administrator users for all IMT support staff to ensure full auditability.
(i) Fixed an issue with the camera export / import facility which will allow any camera issues to be resolved more easily.
(j) Updated all label report names starting 015 to 017 to correlate to the updated cryo label sheets.
(k) Consolidated the ID card reports to make implementation easier plus a small update to the layout to accommodate longer ID numbers.
(l) Added the facility for a small delay in the Patient search facility. This can improve performance and speed of the search on slow networks. This is switched off by default (set to 0), but can be switched on through **Tools** > **Settings** > **Patient List Search Delay** and specifying the number of seconds' delay required. We would recommend setting this somewhere between 0 and 3 seconds.
(m) Bug fix to ensure ID card images are always presented at the correct size.
(n) Bug fix to ensure the patient custom field is not searchable if not enabled.
(o) Bug fix to ensure you cannot save a process map without a type selected.
(p) Updated the layout for Matcher Types to allow more text to be entered for the description.

What do I need to do to implement this update?

You do not need to do anything. Our Support Team will contact your IT Team to arrange installation / upgrade. This can now be done with our one-step installer making upgrades much quicker and easier.

What else do I need to do?

You do not need to do anything further.

You can contact the Matcher Support Team on +44 (0)1829 771 327 or by email at matcher@imtinternational.com if you have any questions.

Documentation updates

The User Guide has been updated with this release. You can find this by clicking **Help** > **User Guide** from within Matcher.

Are there any impacts or risks in applying this update?

- There should not be any disruption to your ongoing work during the upgrade, but access to each PC running the Matcher software will be required to perform the upgrade and user acceptance testing, during which it will be unavailable to use.
- This is a low risk change and does not make any changes to patient or witnessing data. The changes have undergone thorough system and acceptance testing at IMT
- In the unlikely event that the system upgrade causes any negative issues, the software can be rolled back to a previous version.

Quality assurance (QA)

These changes have been subject to IMT's quality assurance process as follows:

- All system changes are logged, tracked and source controlled.
- System testing is completed throughout the development lifecycle to ensure changes have been completed as required.

- Full regression testing is completed to ensure changes have had no adverse impacts on other areas of functionality.
- Full internal ‘user acceptance testing’ is completed by members of the IMT team.
- Usability testing is incorporated into all stages of the QA process.
- Beta testing is completed by a limited number of Matcher customers at their sites with live data (normally one to three customers, which are selected based on the suitability of their workflows with the areas of affected functionality).

Further questions

If you have any questions on this release, please contact the Matcher Support Team on +44 (0)1829 771 327 or email matcher@imtinternational.com.