IMT | Matcher
Electronic Witnessing

Matcher User Guide

Software Version : 4.7
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Contents

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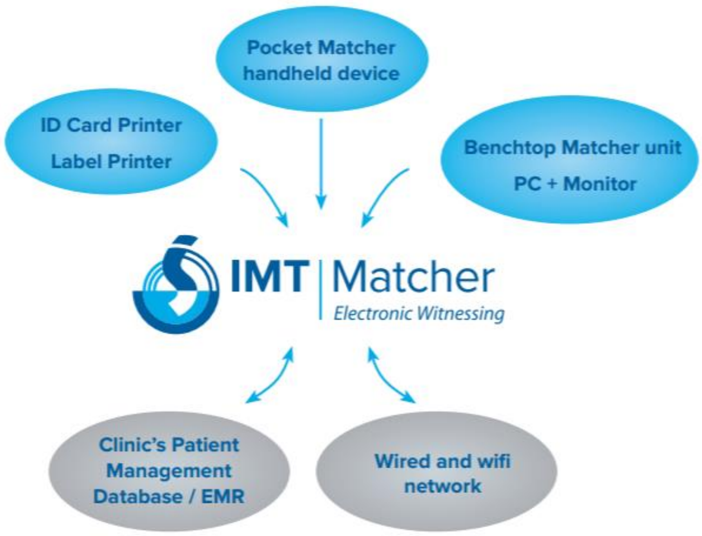
1. Matcher introduction

Matcher is a barcode-based electronic witnessing, traceability and labelling system, specifically created for IVF clinics and donor banks to help prevent errors through misidentification of patients and their gametes and embryos. It is the only electronic witnessing system that is better than human double-checking, reducing the risks of error and saving valuable staff time.

Matcher provides complete electronic traceability, recording the ‘who, what, where and when’ at every step, including photographs of all procedures, unbroken chain of custody evidence and comprehensive reporting for clinics.

2. Components of the Matcher system

The Matcher system is a software system which runs on PCs and uses Benchtop Matcher units and Pocket Matcher mobile devices, together with ID card and label printers and our bespoke labels.



Typical installation in a laminar flow hood; tha Matcher software is controlled on a touchscreen tablet and a Benchtop Matcher reads barcodes using inbuilt digital cameras.

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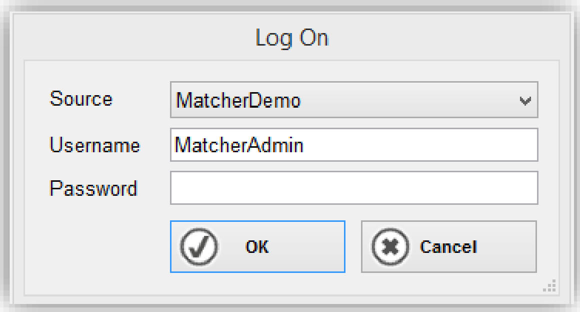
3. Accessing Matcher on a PC / tablet

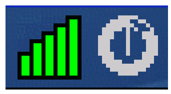
- Double-click the Matcher icon on your desktop
- Log in using your username and password



- Click **OK**
- The patient list will load

4. Accessing Matcher on a Pocket Matcher device

- 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

- Click the Matcher icon

- Ensure the **Source** box is blue before you log on – this shows that you are connected to the Matcher database
- Enter your username and password and click **Submit**

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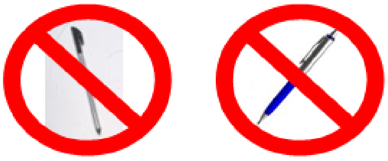
- To log off, click the **Log Off** button at the bottom of the screen.

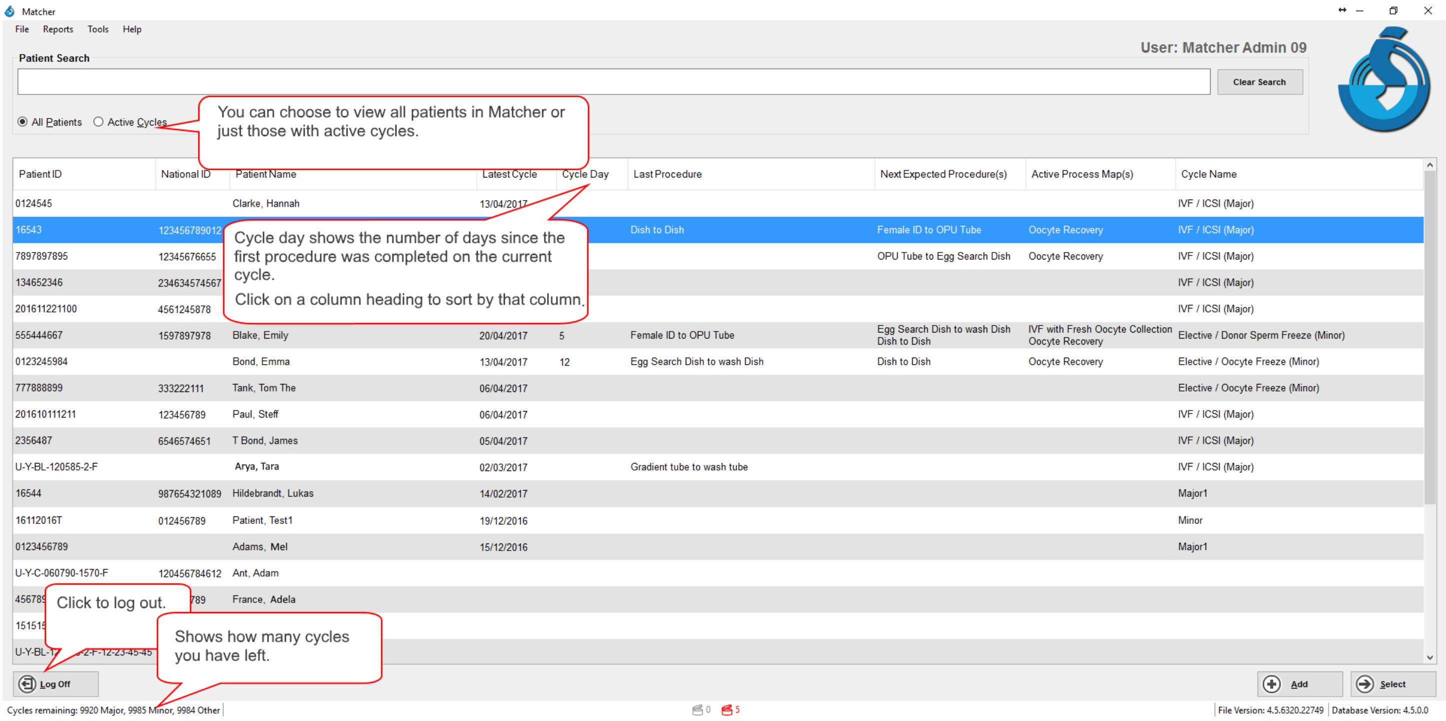
Please note that you are not able to use a hard-tipped stylus, pen or other object on the touchscreen; it is recommended that you only use your fingertips or a rubber tipped capacitive stylus.



The touchscreen works with and without surgical gloves

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 (or long-press on a touchscreen) 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)

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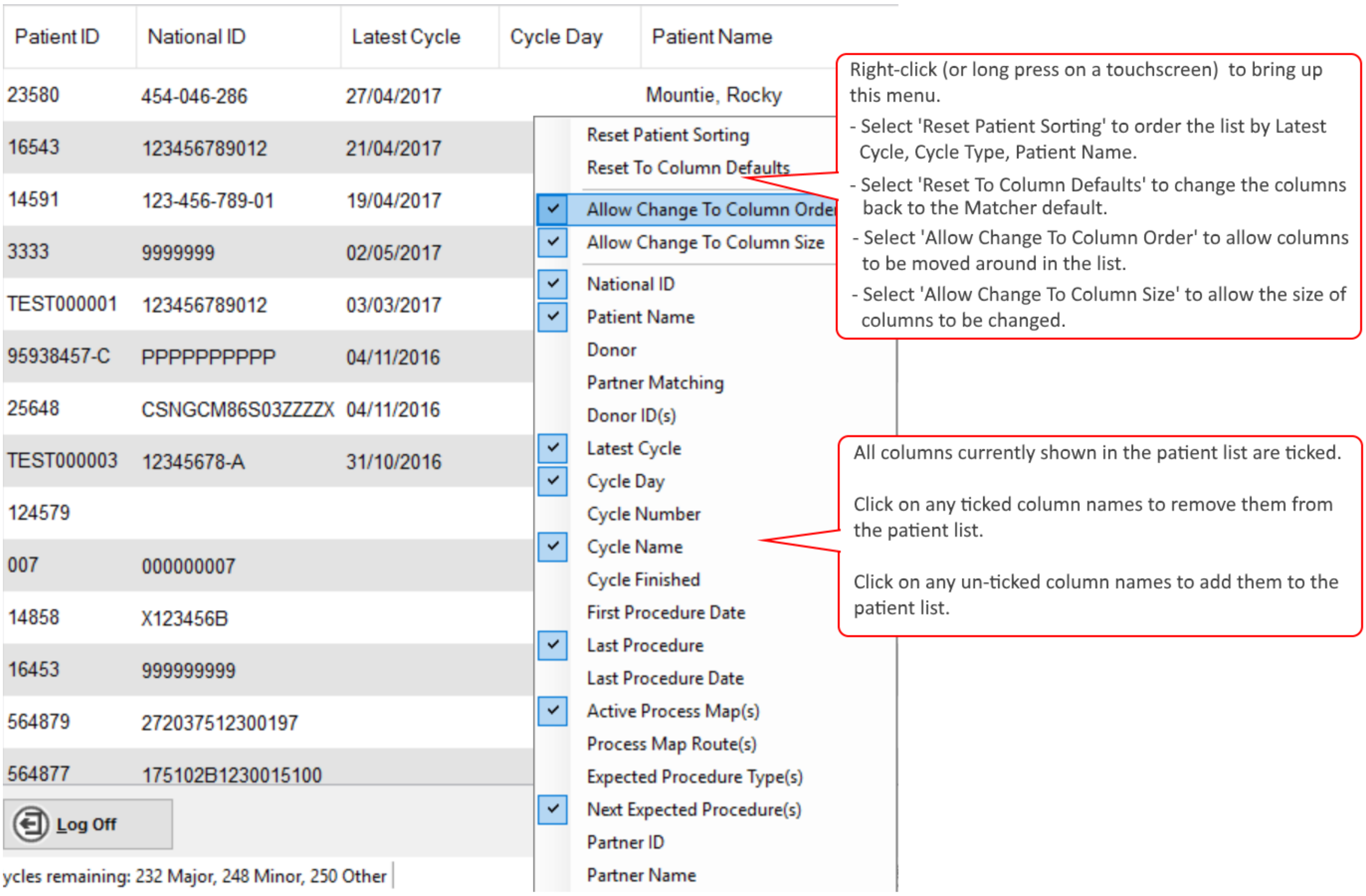
- Patient Name
- Latest Cycle
- Cycle Day
- Last Procedure
- Next Expected Procedure(s)
- Active Process Map(s)
- Cycle name

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’.



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).

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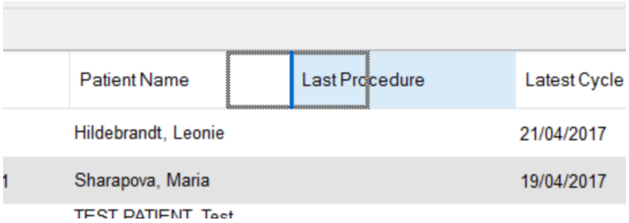


5.3 Sorting the patient list

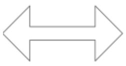
You can sort the patient list by any of the columns. To do this:

- 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.

5.4 Re-sizing columns in the patient list

If there is enough space on the patient list, you can re-size some columns (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 (or long press on a touchscreen) 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 patient list how you want it.

6. Adding and editing patients

Patient registration is completed exclusively on the Matcher PC application. Patient details cannot be entered or edited 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 system

Matcher is normally linked to your Patient/Clinic Management System allowing you to import patients. This means that you do not have to re-enter details into Matcher which saves time and reduces the risk of errors from typographical errors.

- Navigate to the patient list (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, you may be able to search another field, 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 system

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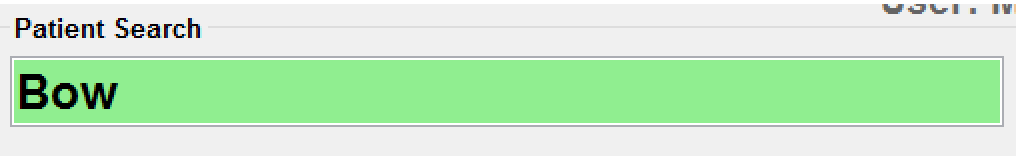
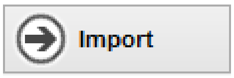


- In order to search *only* in the linked system and *not* in Matcher, tick the **Force Import Search** box

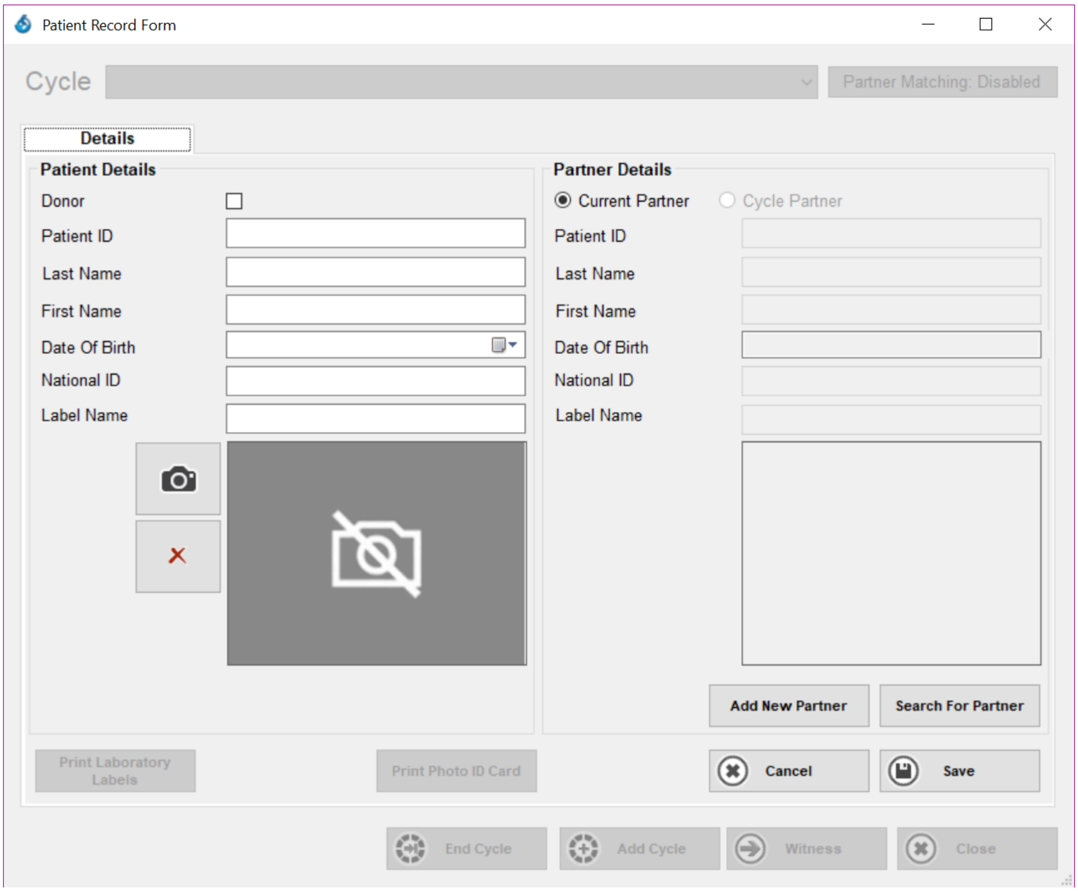
- Double-click on the patient, or select the patient and click **Import**



- The patient details will appear
- Click **Save**

6.2 Adding a patient manually

- Click **Add** on the Patient List screen. The following screen will appear.



- Complete all patient details (First Name and Last Name are mandatory unless the patient is an anonymous donor)
- Refer to the Adding a patient's photo section to add a photo for the patient

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- Click **Save**

If you would like a different name to appear on your labels to the standard *Surname, First name* (e.g. a shortened version) then enter this into the Label Name field. Note that this field can be enabled or disabled per clinic as required. See the Enabling label names section for more details.

There is a custom field available for patients that may be enabled on your Matcher system. In the picture above it is called **National ID**, but could be called something else. See the enabling the custom patient field section for further details.

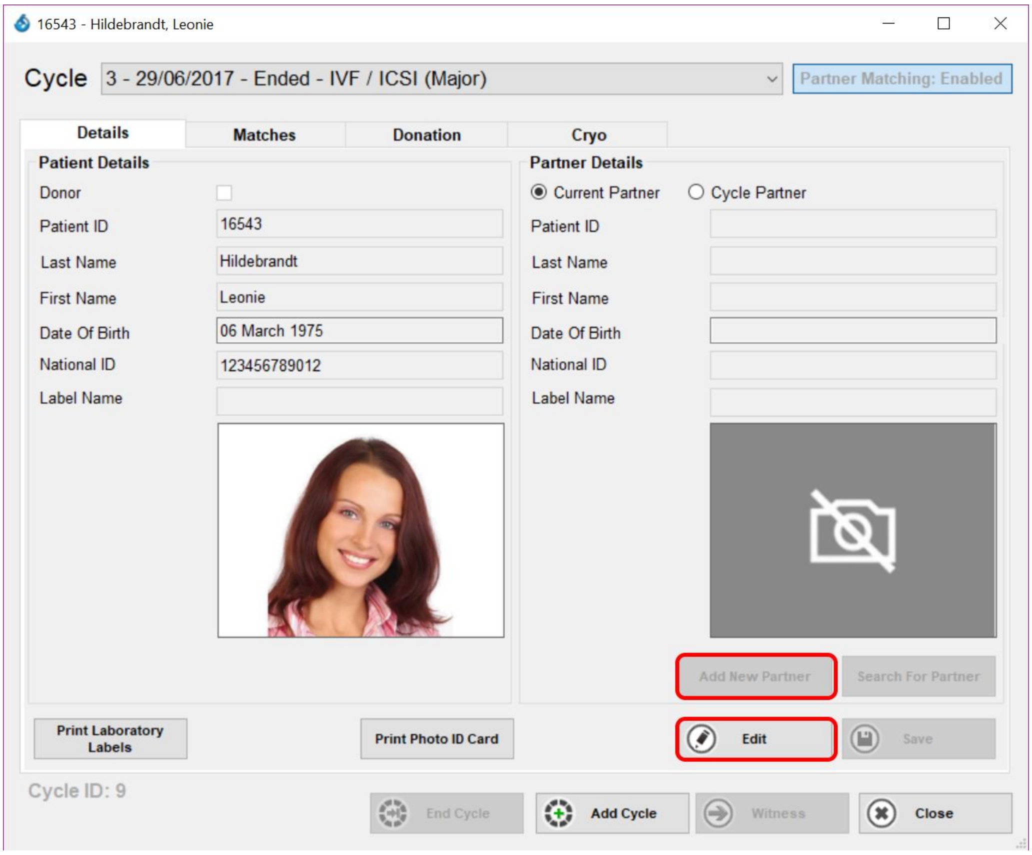
6.3 Adding a partner

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 is 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.

- **To add a new partner**, click **Edit** on the Patient Details screen, then click **Add New Partner** (this button becomes enabled once you are in edit mode).



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

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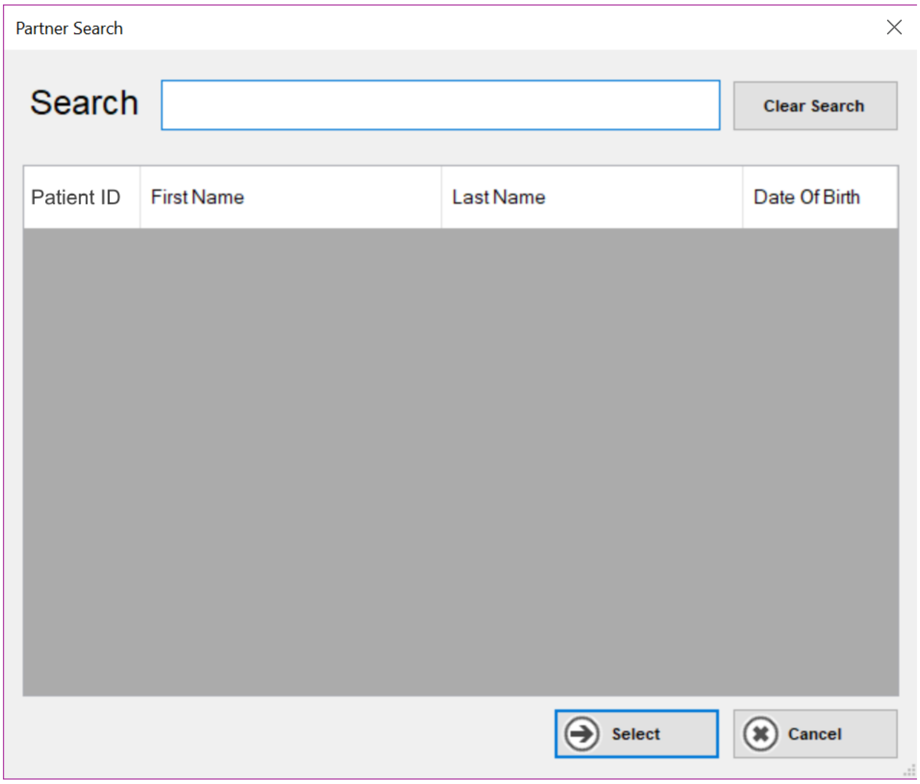
- Click **Save**

6.4 Searching for a partner already in Matcher

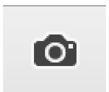
- Click **Edit** on the Patient Details screen
- Click **Search For Partner**. (Note that you will not have this button available if there is already a partner in place. If this is the case click the **Clear Partner** button first.)



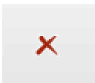
- Enter the partner's name or patient ID in the **Search** box – search results will appear as you type
- Select the relevant partner when their details appear and click the **Select** button
- They will be added as a partner
- Click **Save** to save changes

6.5 Adding a patient photo

- Click the **Edit** button if you are not already in edit mode
- Click the camera button

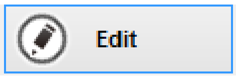


- The capture photo window will open
- Select the type of overlay required from the 'Overlay' dropdown list to assist with the correct alignment of the image
- Click the **Capture** button to take the photo
- The photo will be shown on the patient screen
- Click **Save** to save the photo for the patient
- To remove a photo, click the **X** button



6.6 Editing patient details

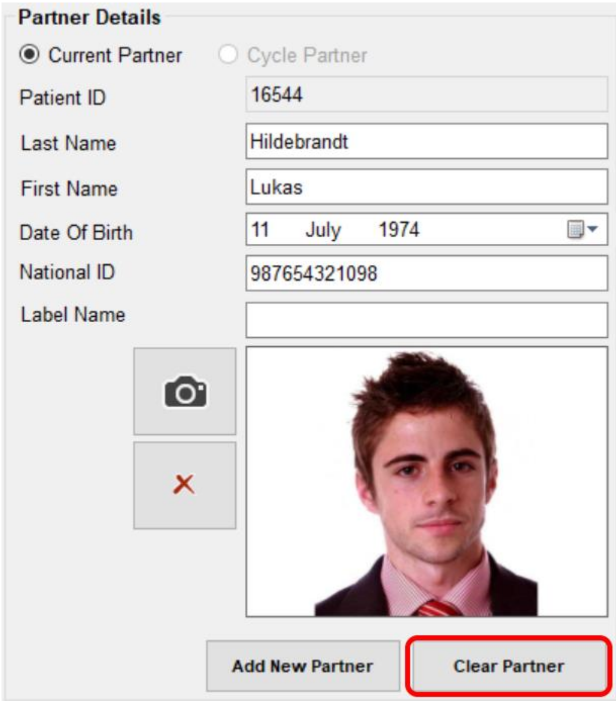
- Click the **Edit** button



- This allows you to edit patient details and add a new partner
- You can edit all patient and partner details, except the **Patient ID** field. This is to avoid Patient ID information changing after witnessing has already been recorded or material being cryopreserved. If you need to change the Patient ID, please contact [matcher@imtinternational.com.](mailto:matcher@imtinternational.com)

6.7 Clearing partner details

- Click the **Edit** button if you are not in edit mode
- Click the **Clear Partner** button



- Click **Save**
- If the patient has a currently active cycle, you will see a message saying '*You have removed the partner. Do you want to remove the partner from the active cycle?*'
- If you select **Yes**, the partner will be removed from the cycle; the cycle will remain active
- If you select **No**, the partner will remain in the active cycle and their details will be displayed until a new cycle is created

6.8 Changing partner details

Note that any cycles and matches completed with the current/previous partner will remain in place. Changing a partner will apply to future cycles only (and to the current cycle if the patient has a current cycle and you agree to this when updating the partner).

To change a patient's partner:

- Clear the partner details
- Register or search for a partner as you would when adding a new partner

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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 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 Matcher.

Please note that linking donors to specific cycles means that if you have subsequent cycles, you will need to re-add the donor to future cycles as the donors 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.

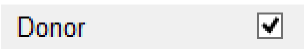
Links to donors can be broken during an active cycle, however, once the cycle has ended the donor is permanently recorded against the recipient.

7.2 Identifying donors

- Click **Reports** > **Donor List Report**
- Update the report order if you wish and click **OK**
- The report will show a list of all donors in Matcher

7.3 Adding a patient as a donor

- Add a new patient as normal (or import from a linked Patient Management System)
- Check the **Donor** checkbox at the top left of the patient details form (as shown below)



- Click **Save**

7.4 Assigning a donor to a patient

- Open the patient to whom you wish to add a donor
- Click the **Donation** tab

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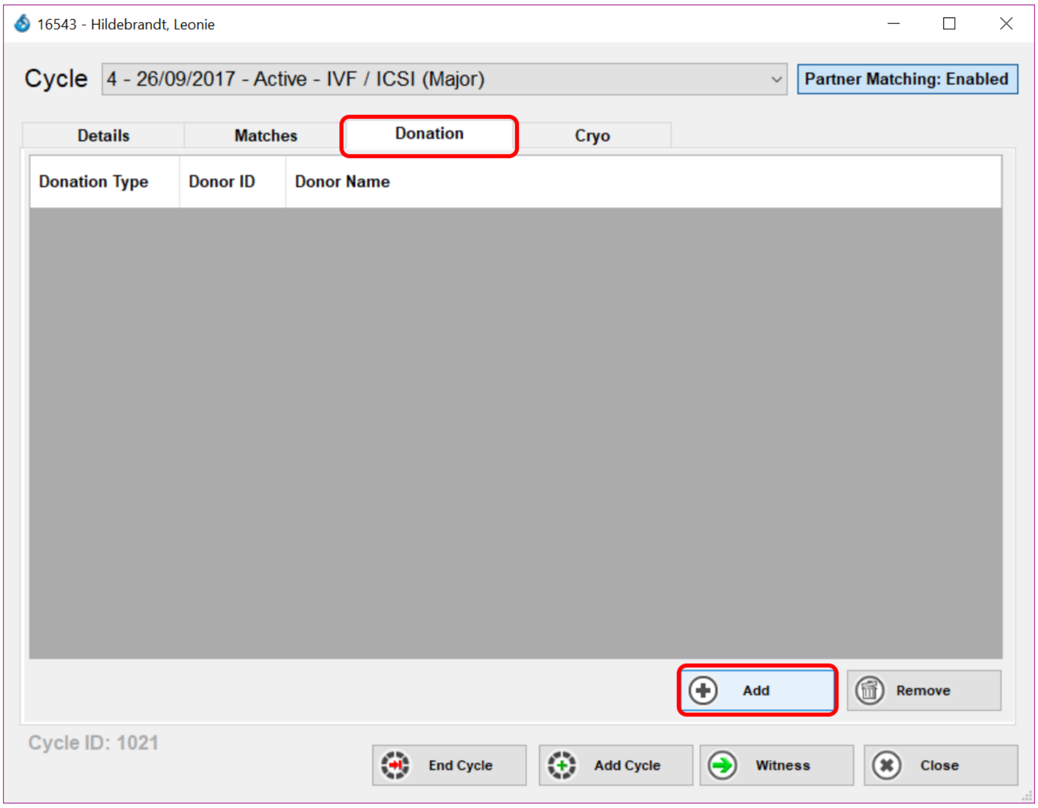
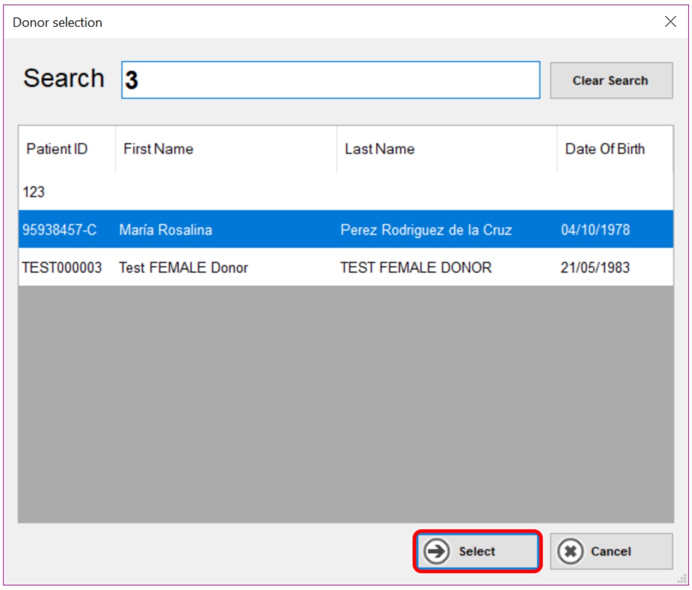


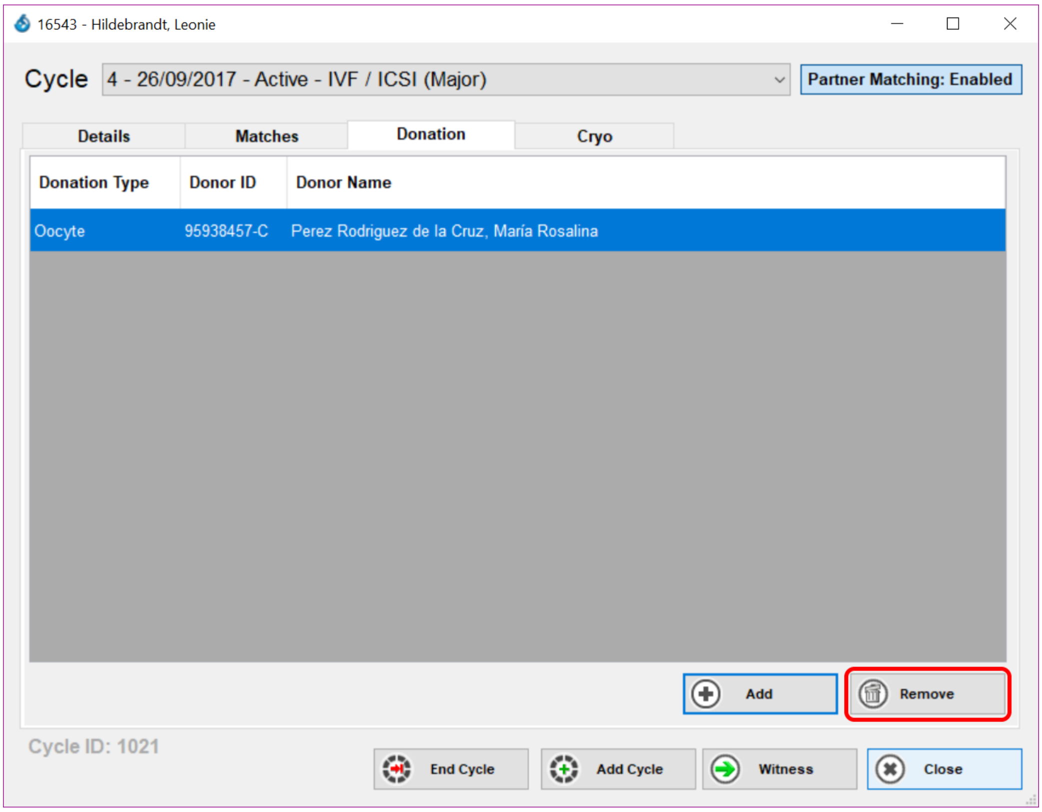
- Click the **+ Add** button
- Select the type of donor you want to add and click **OK**
- When the Donor Search screen appears, search for the donor by entering their name or patient ID – results will appear as you type



- Click on the relevant donor and click **Select**
- The donor will be added to the patient for the current cycle

7.5 Removing a donor from a patient

- Open the patient from whom you wish to remove a donor
- Click the **Donation** tab
- Select the donor you want to remove and click the **Remove** button



- Click **Yes** to confirm
- The donor will be removed from the patient

8. Cycle management

8.1 Patient cycles – overview

To be able to match procedures you will need to give the patient a cycle. 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)

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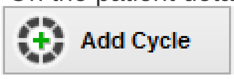
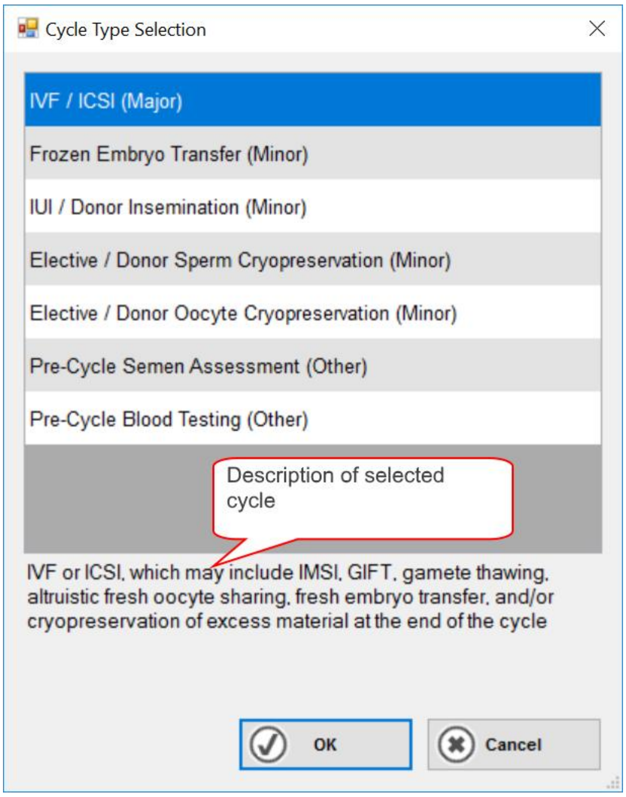
8.2 Adding cycles for a patient

- 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

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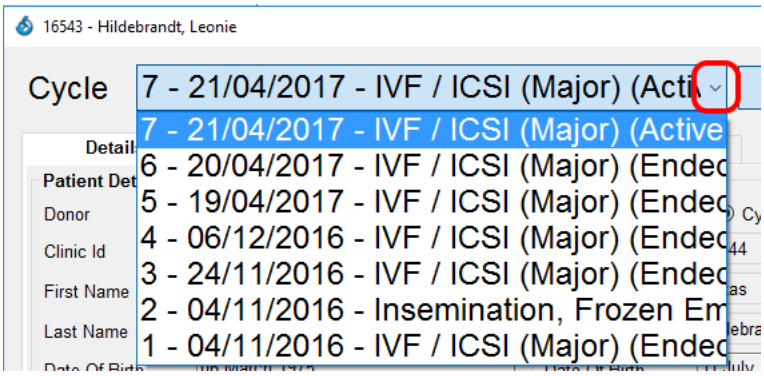
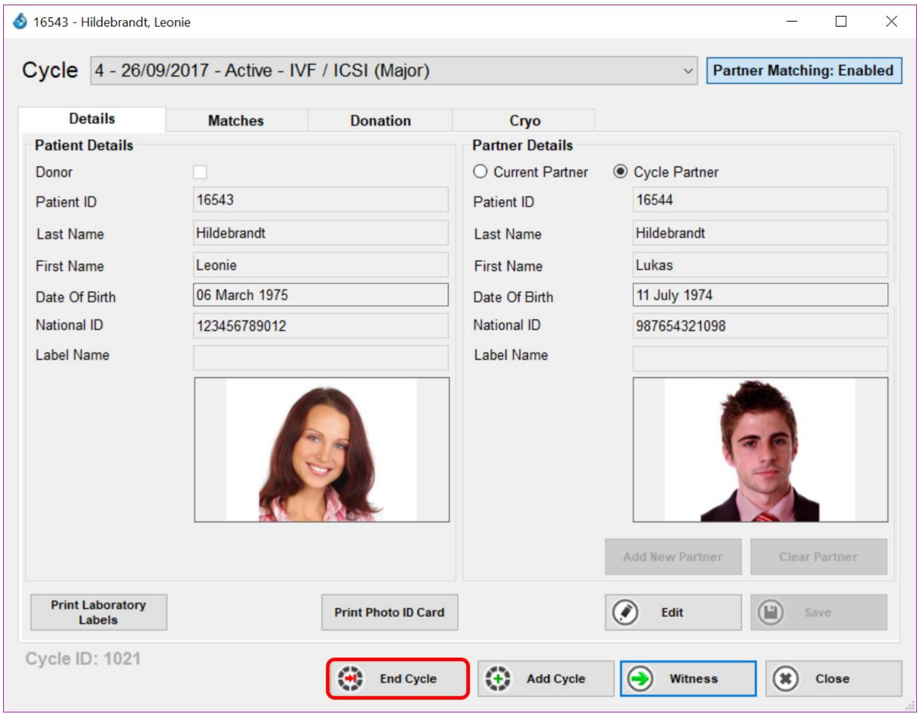


- By selecting an existing cycle from the list, you can view the matches, donation and cryo information for that patient in the selected cycle

8.4 Ending cycles

- Open the patient for whom you want to end a cycle
- Click the **End Cycle** button



- Click **Yes** to confirm you want to end the cycle

Adding a new cycle to a patient who already has an active cycle will end the active cycle.

8.5 Cycle inactivity time out

- Cycles automatically end a certain number of days after the first procedure in the cycle is completed. Generally this is set to 10 days.

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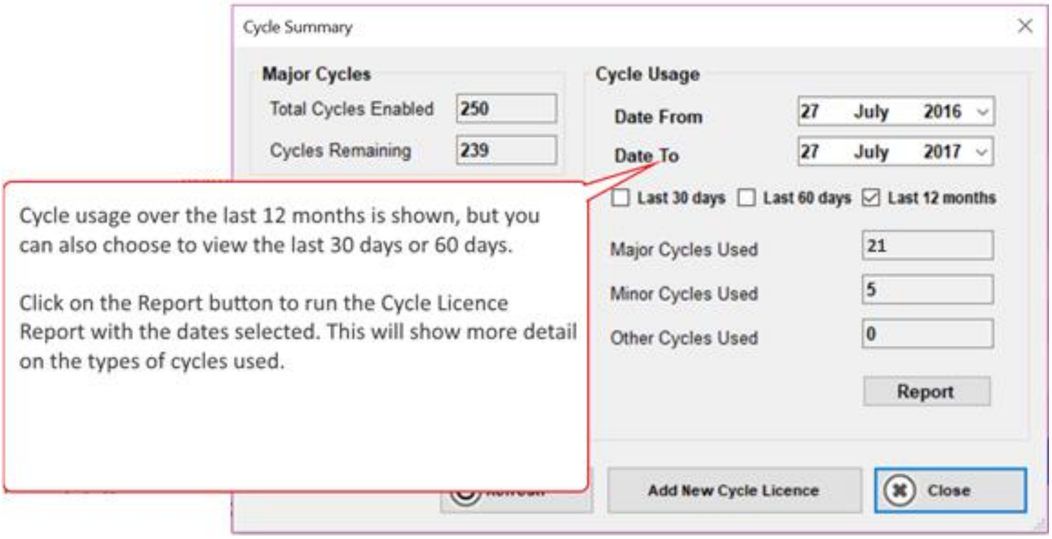
8.6 Cycle auditing

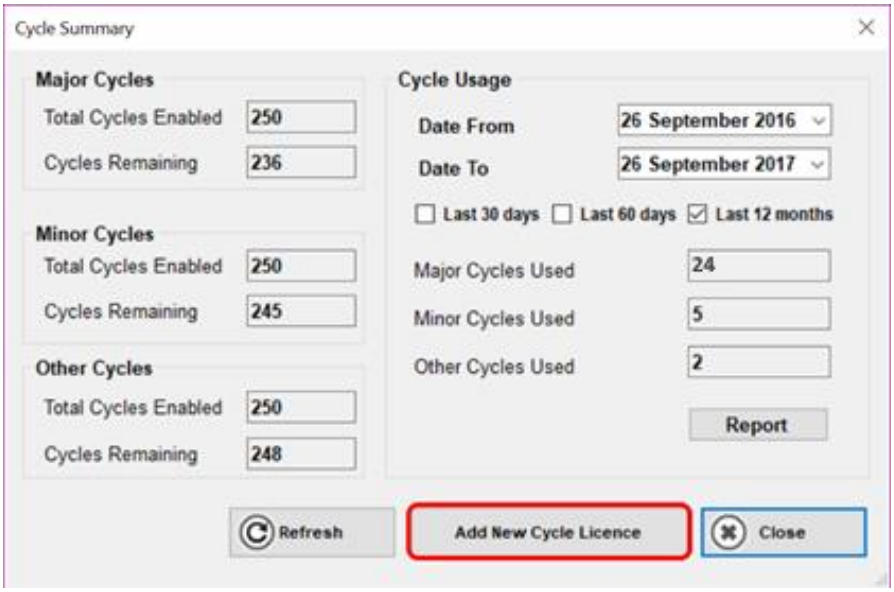
- You can view a summary of cycles used by clicking **Tools** > **Cycle Licence Management**



- The number of remaining cycles is also displayed in the status bar on the Patient List. This shows the current number of Major, Minor and Other cycles remaining in the system.

8.7 Ordering additional cycles

- 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
- Click **Tools** > **Cycle Licence Management**
- Click **Add New Cycle Licence**



- Select the file you saved earlier and click **Open**
- The cycles will be added
- Click **Refresh**
- The cycles will be updated

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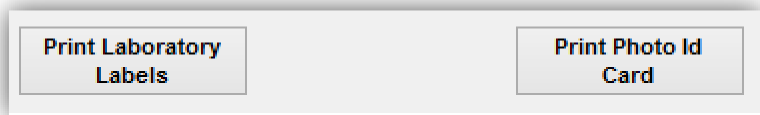
9. Printing ID cards

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. 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



- A print preview of the card will be displayed. Depending on the system settings for your clinic, this could either print just the patient details or patient and partner details.

- If your clinic is set up to print patient and partner details on a card and the selected patient does not have a partner, only the patient’s details will appearon the card.
- Donor details will not be displayed on a patient photo ID card, to maintain anonymity.
- Where the custom patient field (e.g. National ID) has been configured for use at your clinic, this can also be printed on the ID card as shown in the above example.

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- To Print the ID card, select the print icon and the ID card printer from the printer list

- In Settings you can:
  - Set text to appear at the top of the ID card
  - Change the logo to your own clinic logo
  - Add the patient custom field (e.g. national ID) to the card
  - Set the cards to show a single patient's details or those of the patient and partner.

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 Unique vs. non-unique barcodes

There are two types of barcodes available on Matcher label sheets – non-unique and unique.

Non-unique barcodes:

- Encode a patient ID within the barcode;
- Prints the same barcode every time a label or ID card for a patient is printed;
- Allow you to match any label for a patient against any other label for that patient (or a linked partner or donor).

Unique barcodes:

- Encode a patient ID plus a clinic and unique label identifier;
- Print a different barcode on every label that is printed for the patient;
- Allow you to match any non-cryo label for the patient against any other label for that patient (or a linked partner or donor);
- Certain restrictions on which cryo labels will match for a patient – you can only match the same item numbers for the same freeze (such as PCR tube #2 to straw #2) OR the same item type (5x straw labels for the same freeze). This allows you to ensure you are matching the correct embryo, for example when taking biopsies.
- Not able to accidentally scan the same item twice.

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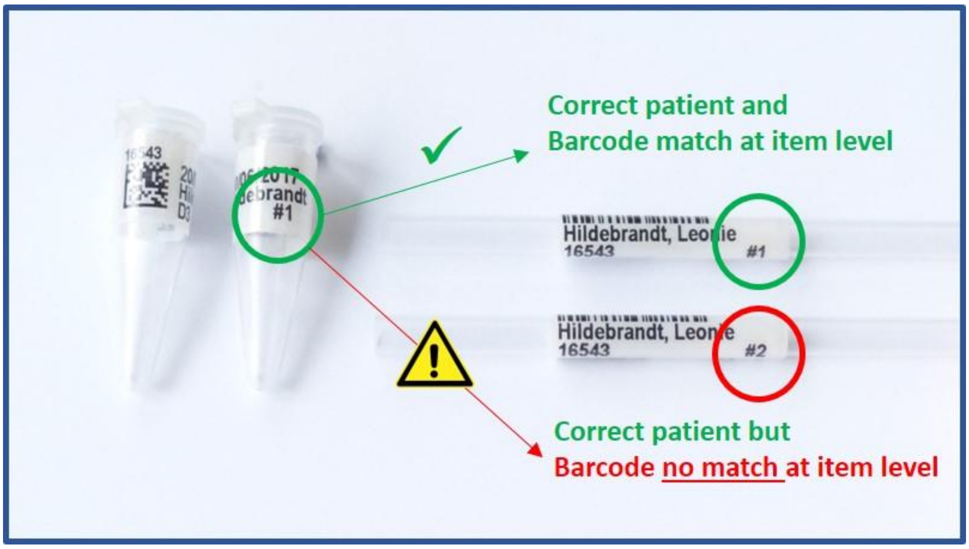

We will check with you at the time of installation (or relevant upgrade) which option you want to use; however please contact us if you want to change to a different option.

10.3 Printing non-cryo labels

- Ensure you have placed the LBL016 or LBL020 sheets into your printer
- Open the patient for whom you wish to print non-cryo labels
- Click the **Print Non-Cryo Label 1** button (this could be called something else at your clinic)
- If you are using non-unique labels, a print review will be displayed showing a preview of the labels
- Click the Print icon and select the correct printer
- Click **Print**
- The labels will print on the label sheet
- If you need to change the label alignment, see the Alignment printing section

Note that it is possible to set up an additional **Print** button for non-cryo labels (e.g. the AVERY mini address labels). You can use this to print alternative label layout if you wish. Please contact us if you'd like to enable this.

10.4 Alignment printing

When Matcher is first set up or when you receive a new batch of labels, you may need to adjust the alignment to ensure labels are printed correctly within the label boundaries.

For labels sheets LBL019 and LBL020, an alignment guide is printed each time you print a label sheet. A crosshair is printed over a cross cut into the label sheet. These should line up exactly for perfectly aligned labels.

For other label sheets you may need to print an alignment guide as follows:

- Click **Tools** > **Label Alignment**
- Select the relevant label report (e.g. cryo) in the **Label Report** drop down
- Click the **Print Alignment Guide** button to print the alignment guide onto a sheet of labels
- The crosshair printed on the alignment guide should line up perfectly with the edge of the labels

Once you have an alignment guide printed (whether separately or built in to the LBL019 or LBL020 sheets) and the alignment is not correct, you can use the numbers on the crosshair to help you adjust the margins:

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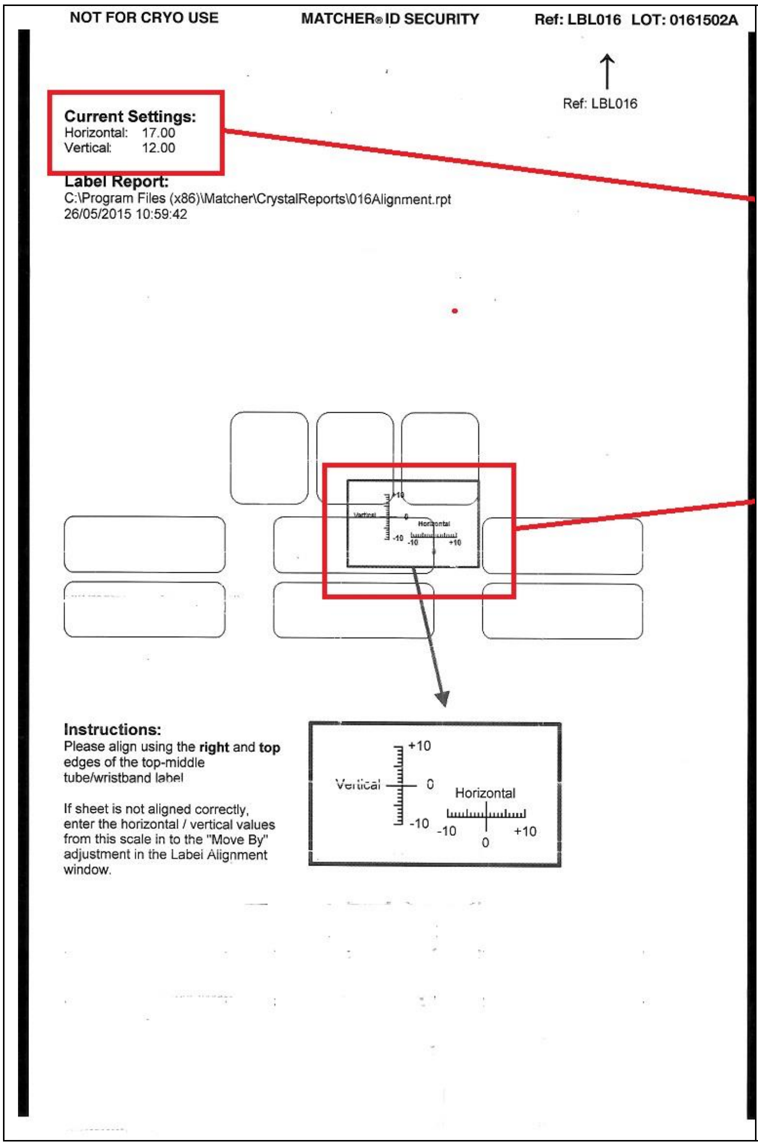

If you print an alignment guide, **Current Settings** will display the current margin settings.

Ensure the vertical and horizontal lines match up to the end of your labels (or the cross cut into the label sheet for 019 and 020 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 need to adjust the margin by +2 millimetres.

To update the alignment / margin settings:

- Click **Tools** > **Label Alignment**
- The screen below will be shown:

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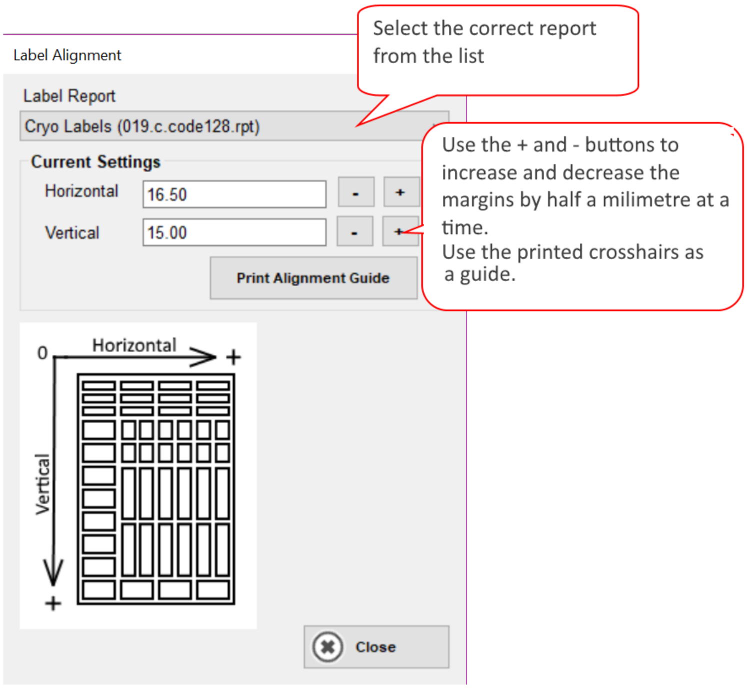

10.6 Label sheet types

There are three types of label sheet available for use with Matcher:

- Non-cryo labels
- Cryo labels
- AVERY mini address labels (L7651)

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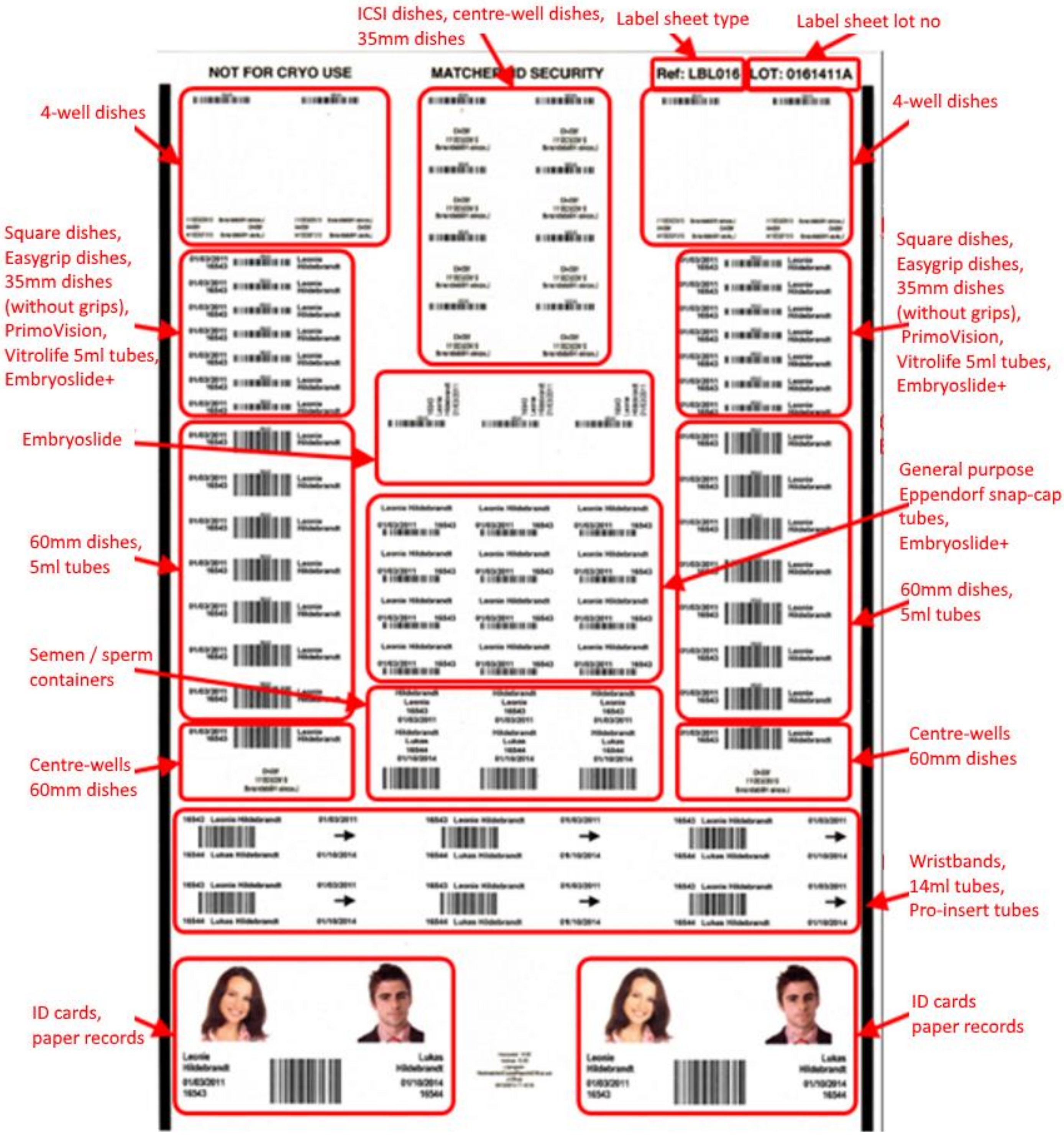
10.7 Non-cryo labels

This is a comprehensive sheet of labels for all labware and other applications for an entire cycle of treatment (excluding cryo preservation). These should not be used for cryo preservation. Non-cryo labels will have the reference LBL016 or LBL020 at the top of the sheet. LBL016 labels are shown below:



LBL020 labels are the same as the LBL016 labels but have a built-in alignment guide in the centre in place of two of the general purpose labels. These are shown on the following page.

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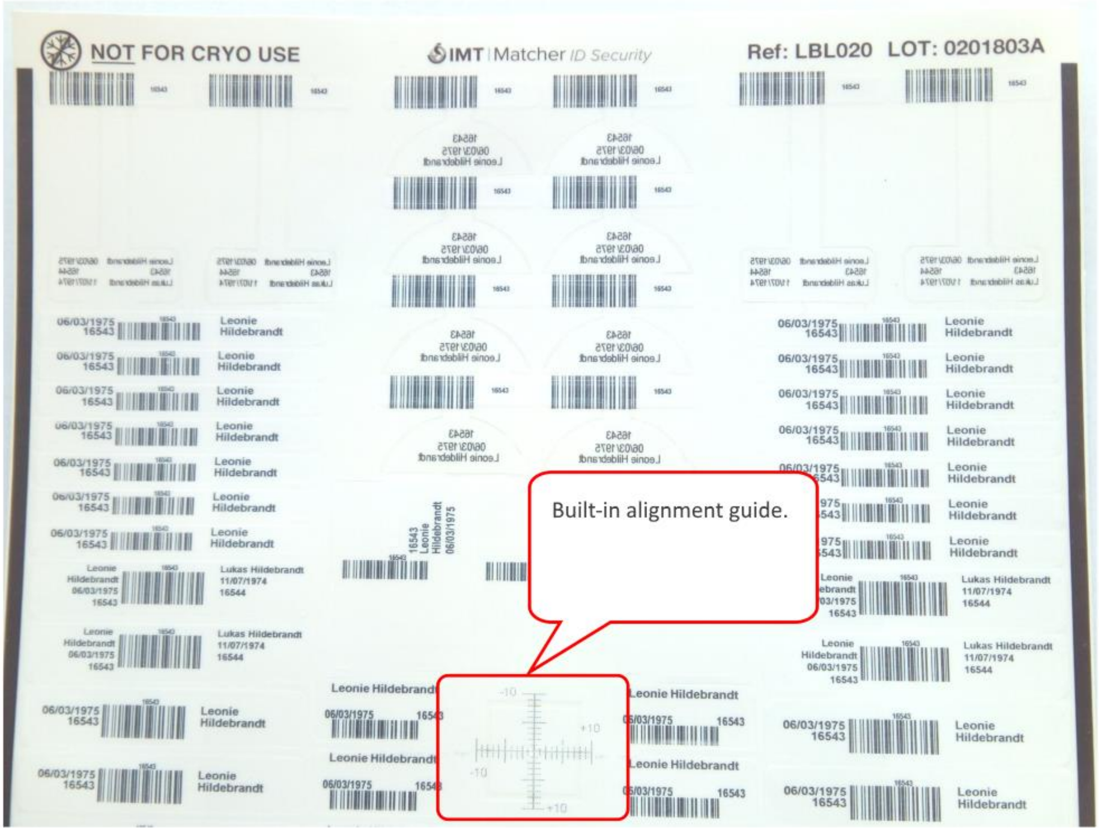

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10.8 Cryo labels

Our cryo labels have been specifically designed for cryo preservation purposes and have been tested and verified for long-term liquid nitrogen storage. The labels are self-laminating - each label contains a white area onto which the barcode and text is printed and a clear part which is wrapped over the white area to provide further protection to the printed label.

There are three types of cryo label sheets available:

- LBL017 sheets contain short straw labels, long straw labels and vial / ampoule labels (14 of each).
- LBL018 sheets contain PCR tubes labels for PGS and PGD in addition to the labels available on the LBL017 sheets (12 of each). The PCR tube labels contain a 2D barcode due to space constraints.
- LBL019 sheets are as per the LBL018 sheets, but they also contain some small dot labels for the top of PCR tubes. They also have a built-in alignment guide.

There are different layouts available for each sheet with different sized text and showing different information. We will discuss the different layouts available at the time of install or upgrade so that we can select the best labels for you.

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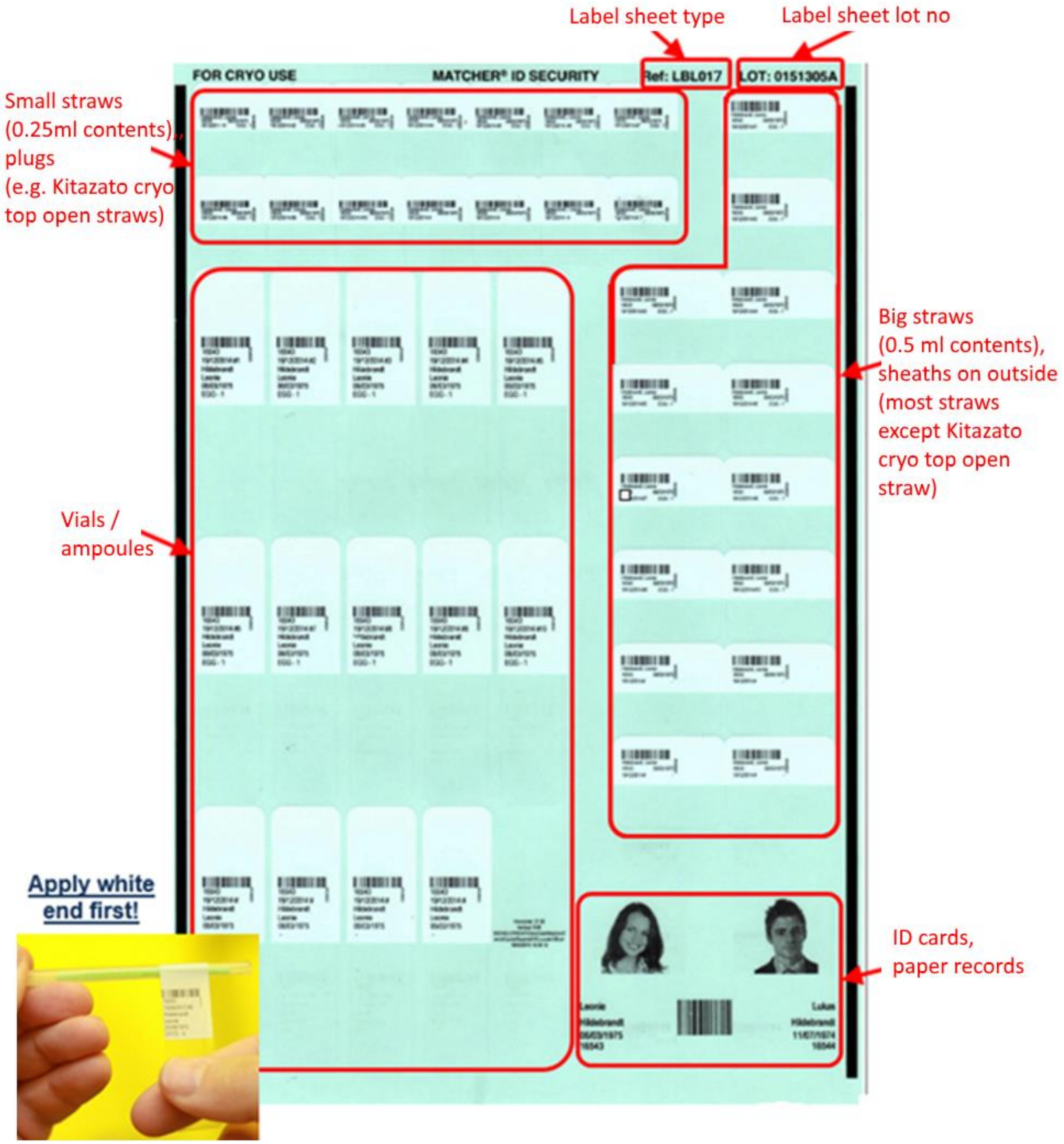
10.9 LBL017 cryo label sheets



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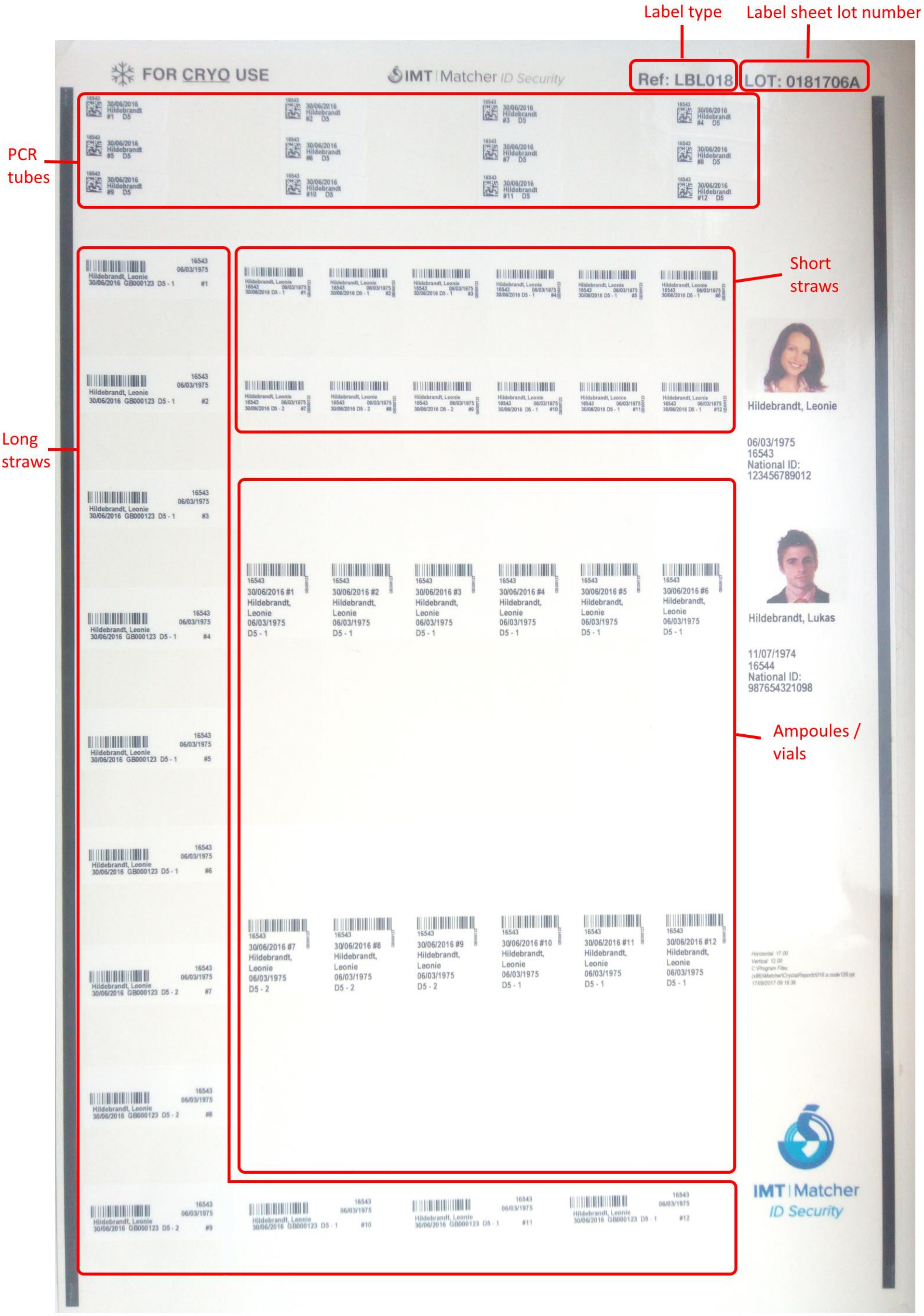
10.10 LBL018 and LBL019 label sheets



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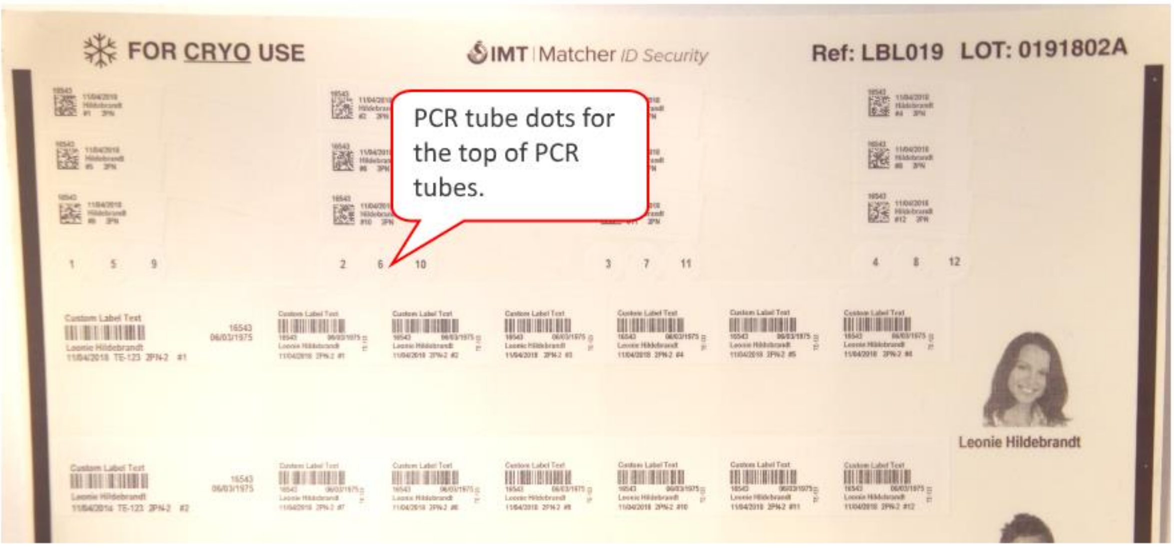
LBL019 label sheets are as per LBL018 with the addition of small dot labels for the top of PCR tubes:

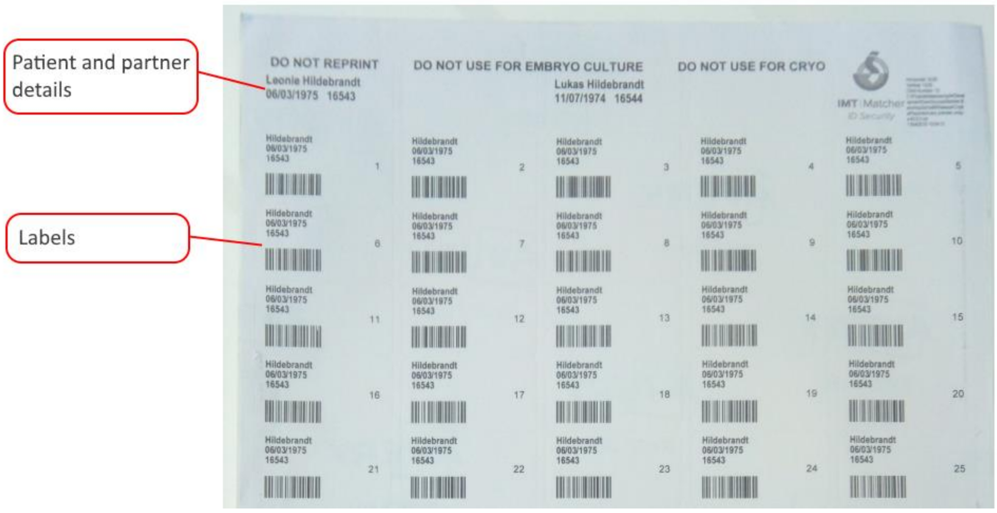


10.11 AVERY mini address labels

You can also print Matcher barcoded labels onto standard AVERY mini address labels (L7651-25). These can be printed directly or saved and emailed elsewhere to be printed.

These are ideal for satellite sites that are unable to have Matcher installed for some reason (e.g. IT infrastructure issues). For example, you can save a label sheet for a patient and email this to a satellite site. The satellite site can then print these labels and attach to patient samples. When these samples are sent back to the main clinic, they can be matched against standard Matcher labels.

These can be set up to be printed from a separate label button. Please contact us or your distributor to enable this.

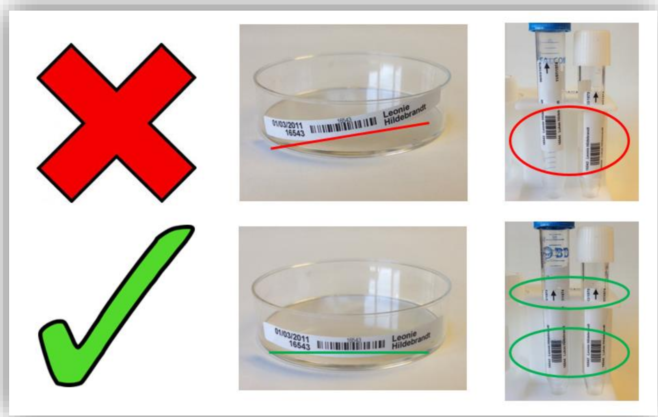


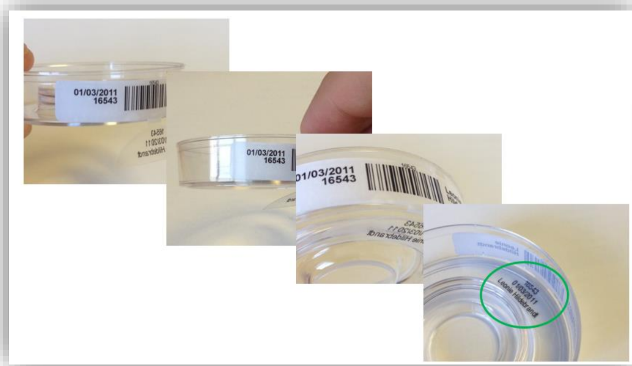
10.12 Label application

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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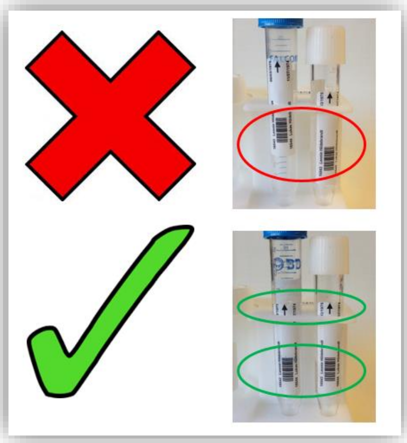
Tubes

- 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



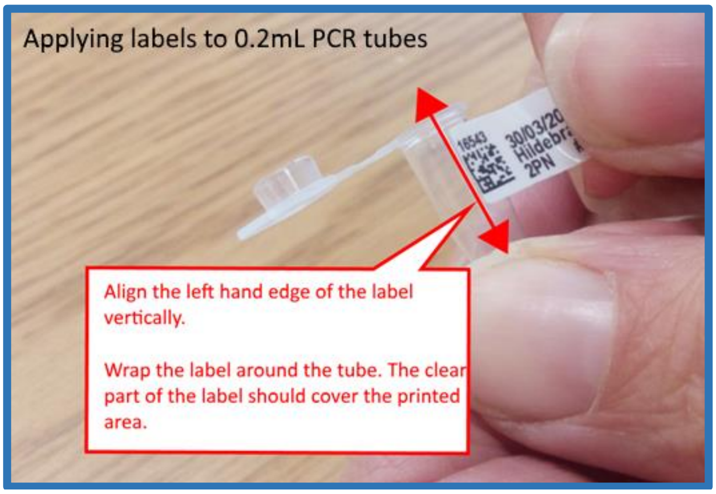
Straws

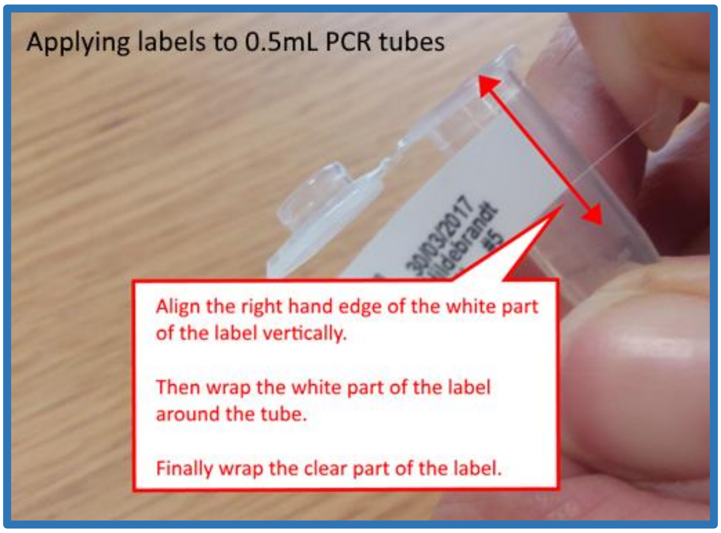
- Use a dedicated straw label, taking care to get it straight
- Ensure you peel off the labels carefully
- Apply the labels ensuring the barcode and patient details are visible and straight

PCR tube labels

PCR tube labels are curved to deal with the tapering tubes (they are larger at the top than at the bottom) PCR tubes can be applied to both 0.2mL and 0.5mL PCR tubes, although the method of application differs slightly for each to ensure adequate lamination to the printed text and barcode.

The method of application for each is shown below:





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11. Electronic witnessing using the Pocket Matcher

11.1 Pocket Matcher – overview

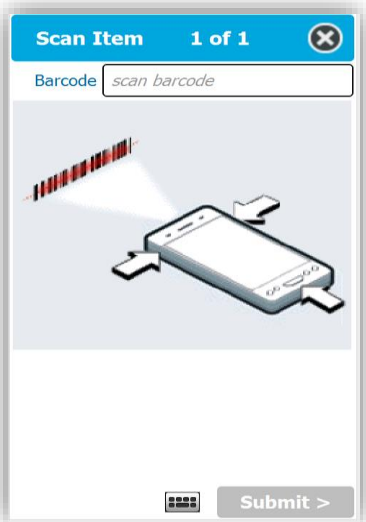
The Pocket Matcher mobile device allows you to complete witnessing and batch/lot tracking in areas where there are no fixed benchtop devices such as the operating theatre, stock room, Andrology, reception and sperm collection areas.

11.2 Electronic witnessing a procedure with the Pocket Matcher

- Open Matcher by clicking the Matcher icon

- Log in using your username and password
- Click the **Witnessing** button

- The patient list will be displayed
- Select or search for the patient for whom you want to witness
- Click **Witness >**
- Select the relevant process map and route
- Click **Witness >**
- The ‘Scan Item’ page will be displayed showing that you need to scan the barcode



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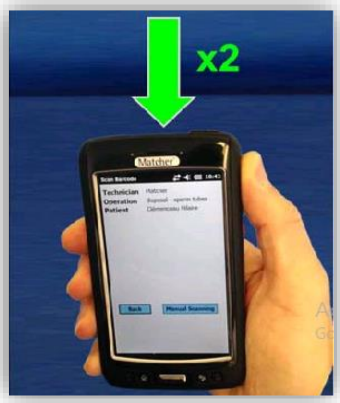
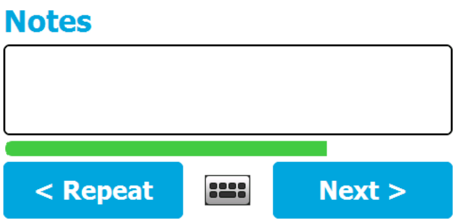
- Point the Pocket Matcher at the barcode



- 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
- Click **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
- When the final container has been scanned, click **Submit**
- If the items match you will see green text showing **MATCH CONFIRMED**
- If the items don't match you will see one of the following results:
    - **NO MATCH** – the barcodes do not match
    - **WRONG PATIENT** – one or more barcodes belong to a patient other than the patient selected (or a linked partner or donor)
    - **WRONG ITEM** – where you are using unique barcodes and trying to match different item numbers together from different label types or different freezes
- If the items 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 a reason
- You can also add notes if required
- You can choose to repeat where you wish to perform the same witness step again or you can click **Next** to move to the next witness step (or to choose another one)
- Please note that the Pocket Matcher 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.

11.3 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 moved to a different screen, this will automatically log you off.



- 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

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11.4 Manual entry of barcodes

Where an item cannot be labelled with a Matcher barcode, or where the Pocket Matcher cannot read the barcode for some reason, you will be asked to manually enter the patient ID instead.

- When you are prompted, manually enter the patient ID
- Click **Submit**
- The barcode will be saved manually with your photo
- You can add notes if applicable
- Select **Next >** or **< Repeat** as required

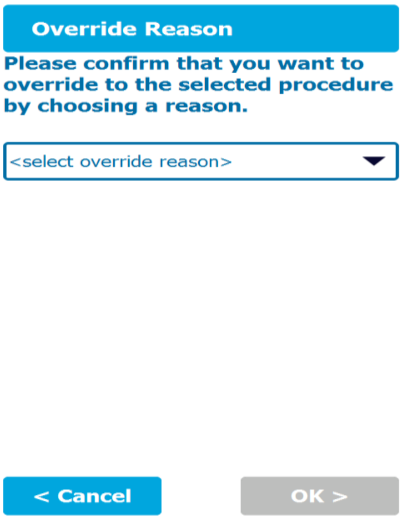
11.5 Repeating a witness step on the Pocket Matcher

- On the Witness Result screen, you can click the **< Repeat** button to repeat the same witness step for further items.
- If the result is a NO MATCH, WRONG PATIENT or WRONG ITEM you can choose **< Retry** to try the match again with the correct items.

11.6 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
- From ‘Active Process Maps’ select the ‘process map’ you want to perform
- You will be asked to complete an override reason



- Select the relevant reason 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

11.7 Performing a patient name check

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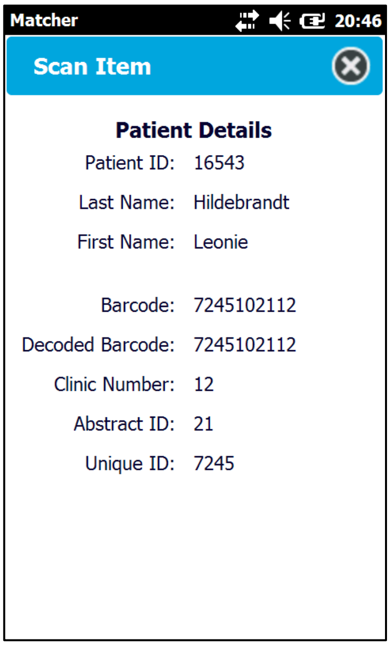
The Pocket Matcher has the facility to perform a standalone patient name check barcode scan. This feature allows you to scan a barcode and the patient name will be shown to you. If you are using unique barcodes, you will also see a breakdown of the barcode.

This could be useful if, for example, you are removing an item from cryo storage but you cannot see the label clearly to identify the correct patient name through the liquid nitrogen/vapour. You can use this feature to scan a barcode and check the patient name, without recording a witness step.

- From the main screen on the Pocket Matcher, click the **Patient Name Check** button.
- The Scan Item screen will be shown; scan the barcode by pointing the Pocket Matcher at the barcode and pressing the silver button until the red light appears and there is a click.
- Details about the barcode, including the patient will be shown on the screen, as shown below:



12. Electronic witnessing using a Benchtop Matcher device

12.1 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.

12.2 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.

12.3 Matcher tube rack

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

12.4 Witnessing a procedure with a Benchtop Matcher

- Select the patient for whom you want to witness and click the **Witness** button
- Select the relevant process map and route
- You will see the witnessing prompt screen advising it is ready to witness

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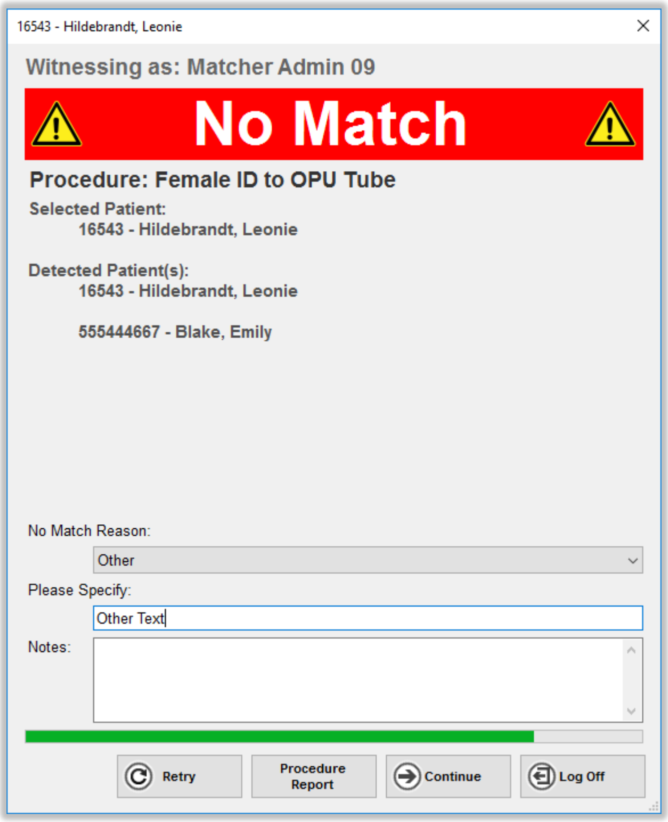
- Add your dishes and/or tubes in the positions highlighted, ensuring that the barcodes are facing the Benchtop Matcher unit
- Click **Witness**
- If the dishes match, you will see the following message

- You can add notes if you wish
- Click **Continue** to return to the **Patient Details** screen
- Details of the match will be displayed in the Matches tab on the Patient Details screen

- If the items don't match you will see one of the following results:
  - **NO MATCH** – the barcodes do not match
  - **WRONG PATIENT** – one or more barcodes belong to a patient other than the patient selected (or a linked partner or donor)
  - **WRONG ITEM** – where you are using unique barcodes and trying to match different item numbers together from different label types or different freezes



- 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 also add notes if you wish

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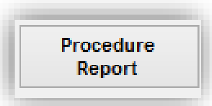
- Select **Retry** to perform the witness step again with the correct items
- You can see a print out of the No Match using the **Procedure Report** button

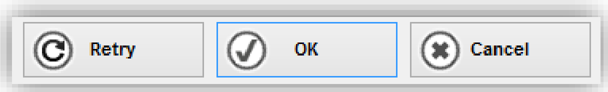


- The Procedure report will be displayed for that witness step, including the photographs taken

12.4 Manual entry on a Benchtop Matcher

Where an item cannot be labelled with a Matcher barcode, or where the Benchtop Matcher cannot read the barcode for some reason, you will be asked to manually enter the patient ID instead.

- When prompted, manually enter the patient ID 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 enter additional notes if you wish
- Cancel will cancel the request and pop up a message advising ‘The image acquisition was cancelled’ and select ‘OK’.

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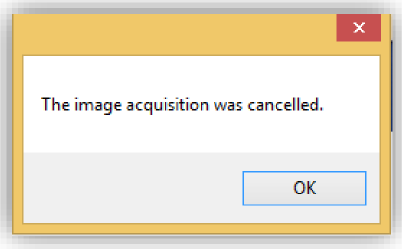


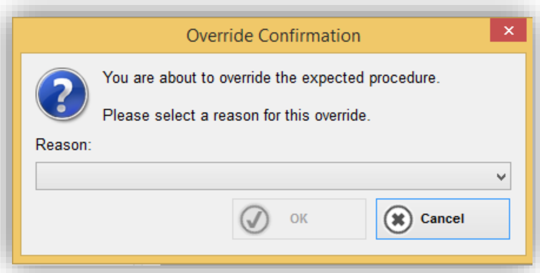
12.5 Repeating a witness step on Benchtop Matcher

- Once you have completed a match on the Benchtop Matcher, you can choose to Repeat
- This will allow you to complete the same procedure again
- NOTE that you cannot repeat a split procedure (where scans are split between the Benchtop and Pocket Matcher)

12.6 Overriding to a procedure out of sequence on Benchtop Matcher

Matcher sets out a defined sequence of matching steps (or procedures) within process maps – for example you may have a process map for *Cryopreservation of sperm* which sets out all of the expected matching steps for this activity in a set sequence. It is expected that you will normally follow this set sequence; however, there will be occasions where you need to deviate from the standard process.

- Once you click **Witness**, select the relevant process map
- Select the relevant procedure (you can swap to a different *route* on the process map if you wish)
- Where you choose a procedure that is out of the defined sequence you will be asked to select a reason for the override

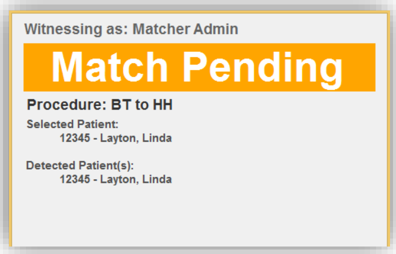


- Select a reason and click **OK**
- The override will be logged in matcher and will be viewable via the Override report.

12.7 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

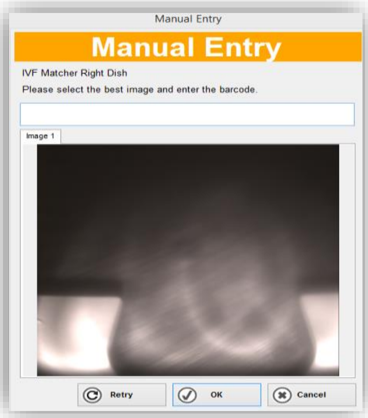
- The user will see the ‘Match Pending’



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

12.8 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

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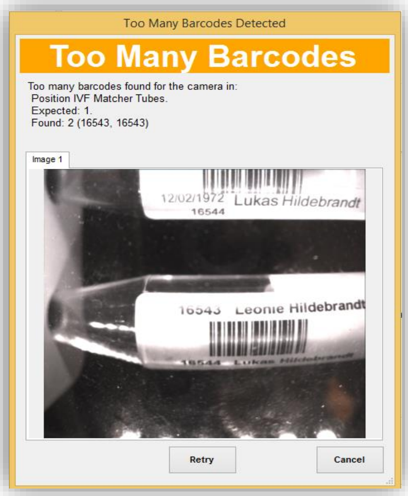
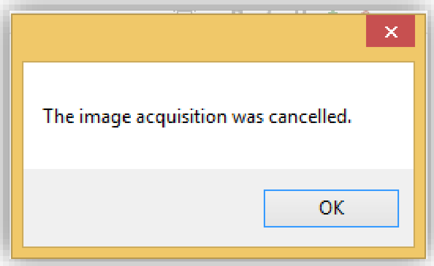
- Select ‘OK’

12.9 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



- 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

12.10 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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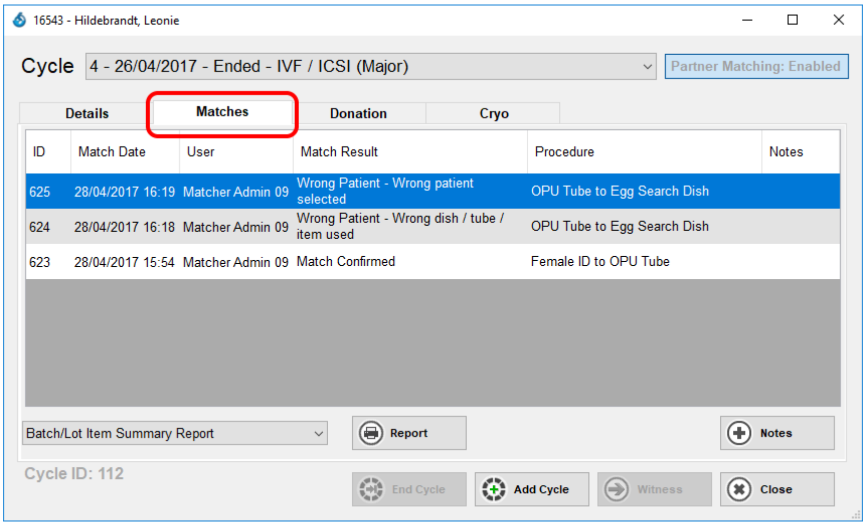


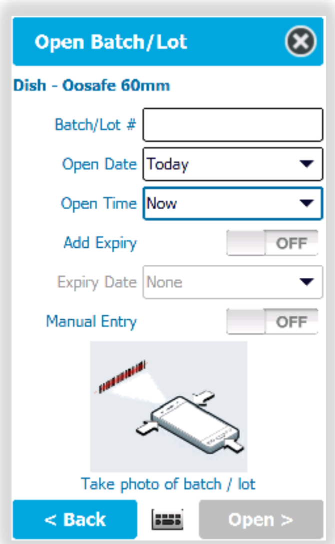
13. Batch/lot tracking using a Pocket Matcher

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

- Log in to the Pocket Matcher and 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

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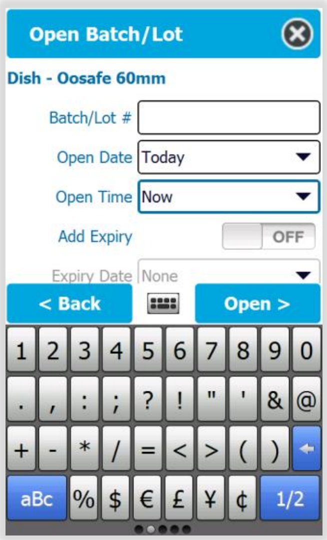
- Scan the Batch/Lot number (LOT: 0161502A) by selecting the silver button on the bottom centre of your handheld device
- Set Open Date and Open Time (must not be in the past)
- If you want to use today's date and time, leave the defaults in as shown above and select Open Batch/Lot
- If you want to add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

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- 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

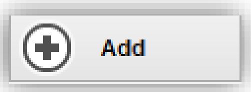
- When there are critical alerts these will be displayed in red

- 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 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
- 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

The **Product Type** field is configurable and can be edited – you can add, remove or edit options in this field. See Matcher type management for further information on how to do this.

14.2 Deleting a product

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

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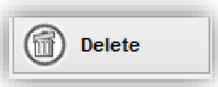
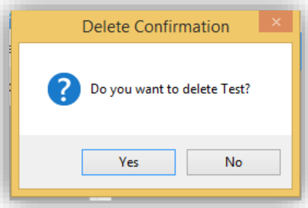
- Select the ‘Delete’ button



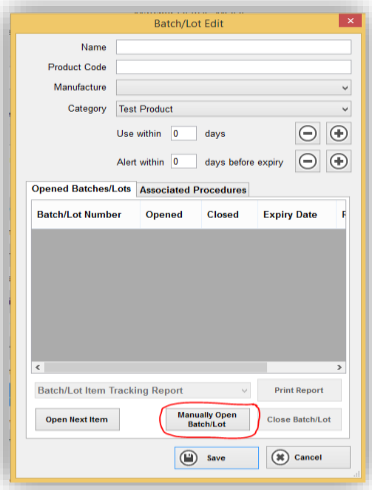
- A window will pop up asking you for verification that you want to delete the Batch/Lot Item



- Select the ‘Yes’ button
- The Product will be deleted

14.3 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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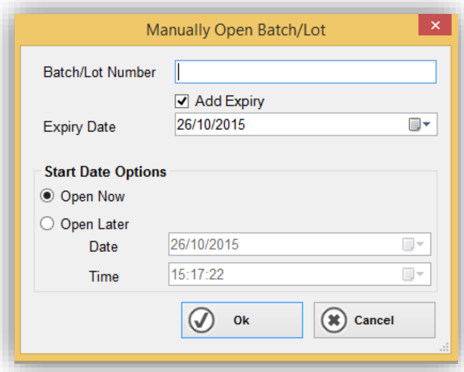
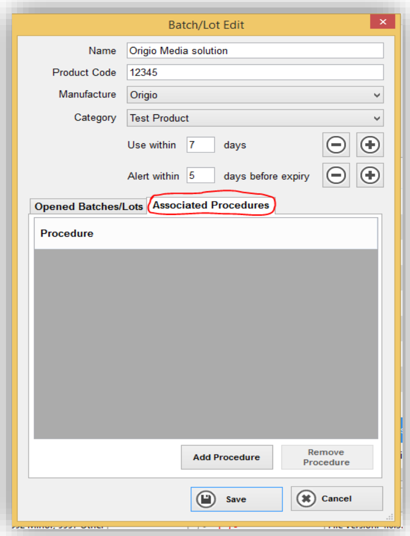


- Complete this by entering the Batch/Lot number
- If the Batch/Lot has an Expiry Date, leave the tick box in the ‘Add Expiry’ tick box and enter an Expiry Date using the calendar function (The date defaults to today’s date)
- If the Batch/Lot does not have an expiry date, untick the ‘Add Expiry’ tick 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

14.4 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

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14.5 Batch/lot alerts on a PC

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

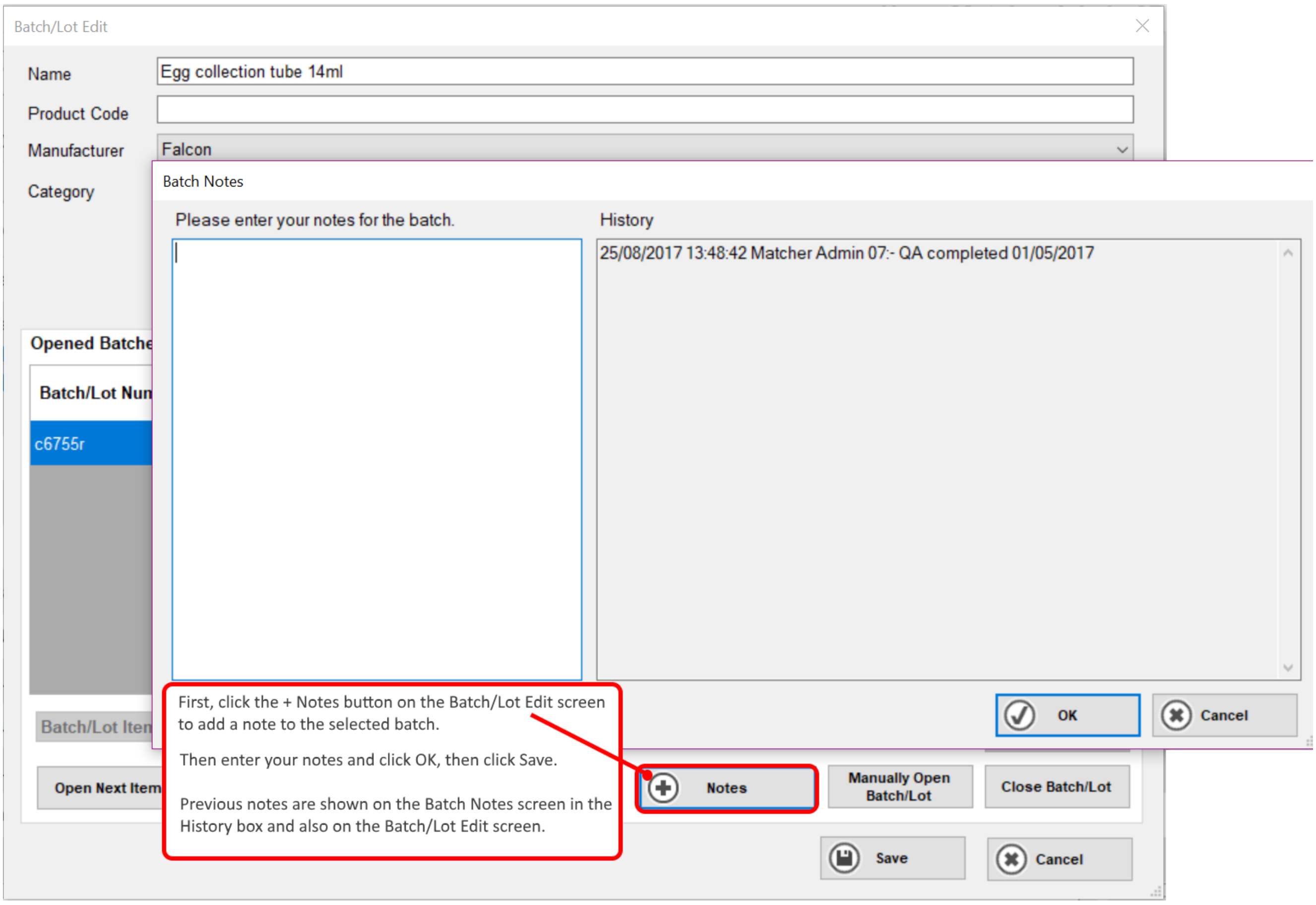
- The left icon will display the number of warnings there are on the batch items that are due to expire
- The right icon will display the number of critical alerts there are on the batch items that have exceeded the date of expiry
- They will appear grey in colour when there are no alerts or warnings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

14.6 Adding notes to a batch/lot

You can add notes to a batch/lot, for example to record QA information, as shown below.



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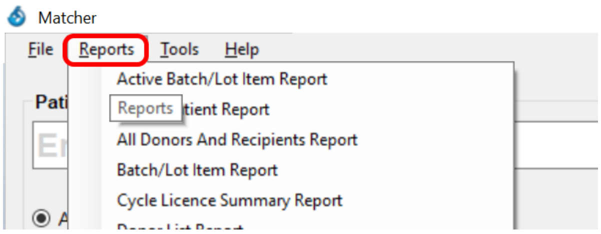
- Batch notes are stamped with the date and time they were added and the user that added them. Once notes are entered they cannot be edited, but you can enter additional notes.

15. Reporting

15.1 Global reports

Global reports are available through the Reports menu.



Reports displayed in this section are

- **Active Batch/Lot Report** – Summary details of all batches in use.
- **Active Patient Report** – Summary of all patients who have active cycles.
- **All Donors and Recipients** – Shows all procedures where donor material has been matched. Details include the donor, recipient and the procedure / witness step.
- **Batch/Lot Report** – Summary of batches/lots that have been used
- **Cycle Licence Summary** – Shows the total cycle licences of each type used within the specified date range.
- **Donor List Report** – Summary of all donors including their ID and name.
- **Edited Freeze Items By Date –** Shows all freeze items that have been edited and the details that have been changed within the specified date.
- **Edited Freeze Items By User** – Shows all freeze items that have been edited and the details that have been changed. Allows you to select a specific user to report on.
- **Expired Batch/Lot Report** – All expired batches/lots that were in use within procedures on active patients for auditing purposes.
- **Expiry of Consent Report** – Shows all patients for whom consent for cryo storage has expired
- **Manual Entries Report** – shows all witnessing steps where there was no barcode, or where Matcher could not read the barcode, and the ID has been entered manually instead. Allows you to specify a date range and/or a specific Matcher user to report on.
- **Mismatch Report** – Report detailing all NO MATCH, WRONG PATIENT and WRONG ITEM witness results. This report details the date and time, the selected patient, the procedure, any remarks/comments made, the camera position and the embryologist who performed the procedure.
- **Override Report (All Patients)** – All procedures performed that were outside of a defined process map route and where an override reason was requested. This report details the date and time, the patient ID, the patient name, the expected procedure, the performed procedure, the reason given for the override and the user who performed the procedure.
- **Patient Records viewed by Date Range** – 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 use(you are asked to select a user when running the report). The report will detail the View Date and Time and the Patient.
- **Procedure Details** – Summary of all 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 Procedure Details screen.
- **Process Map Details** – Details all current versions of process maps.
- **Witnessed Procedures Summary Report** – Summary of all witnessing procedures performed and their results.
- **Witnessed Procedures Summary By User Report** – Summary of all witnessing procedures performed by a specified user and their results.

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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:

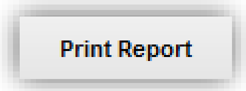
- **Batch/Lot Summary Report** (This Patient) – Summary of the batches/lots used on this patient. It will indicate the procedure, Batch/Lot numbers, Product and Dates and times
- **Override Report** (This patient) - Summary of all deviations from prescribed procedure process maps. Includes date / time / 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). Where donor material has been included in the witness, the details are not included but instead you will see a 'Material Anonymised' stamp.
- **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

- 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

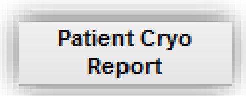
- These can be selected by selecting from the drop-down menu and selecting 'Print Report' button



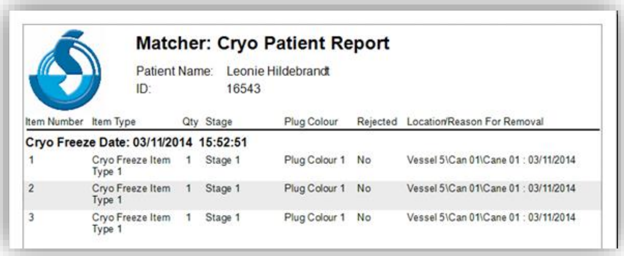
15.4 Other reports

Patient cryo report

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



- The Patient Cryo Report will be displayed



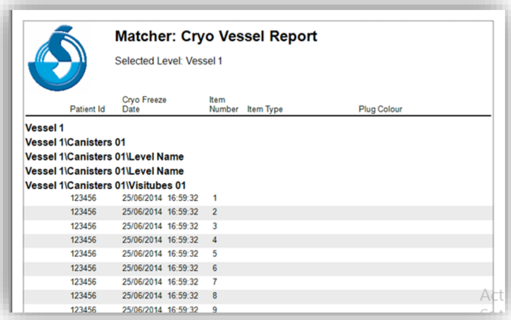
Matcher: Cryo Patient Report

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

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		

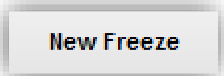
Cryo movement report

- 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. Cryo / freeze batches

16.1 Creating a new cryo / freeze batch

- In the Cryo tab, select the 'New Freeze' button



- Select the Date of Freeze (the 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

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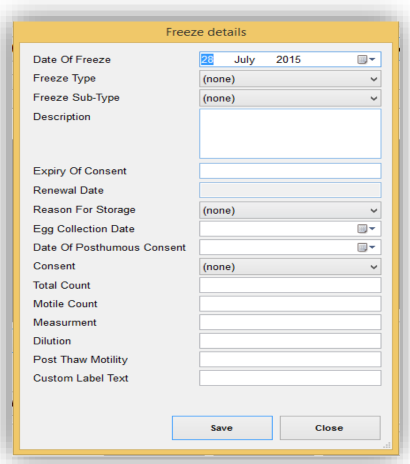
- Select Freeze Sub-Type from the drop down menu
- Enter description if further information relating to the freeze batch needs to be recorded
- Enter Expiry of Consent in years this will appear in the Expiry of Consent report
- Enter the Renewal Date (this will automatically be created if you have entered 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 (e.g. freeze batch number or donor number). This will appear on each straw and vial label when you print labels for the freeze. It will not appear on PCR tube labels.
- Select ‘Save’



16.2 Creating item(s)

An item is a single unit e.g. a straw, an ampoule/vial, PCR tube or a vitrification receptacle. When you print cryo labels for your freeze, a label will be printed for each freeze item.

- First ensure the freeze to which you want to add items is selected, then click the **Add Items** button.
- The Freeze items details page will be displayed. Complete the details as shown below:

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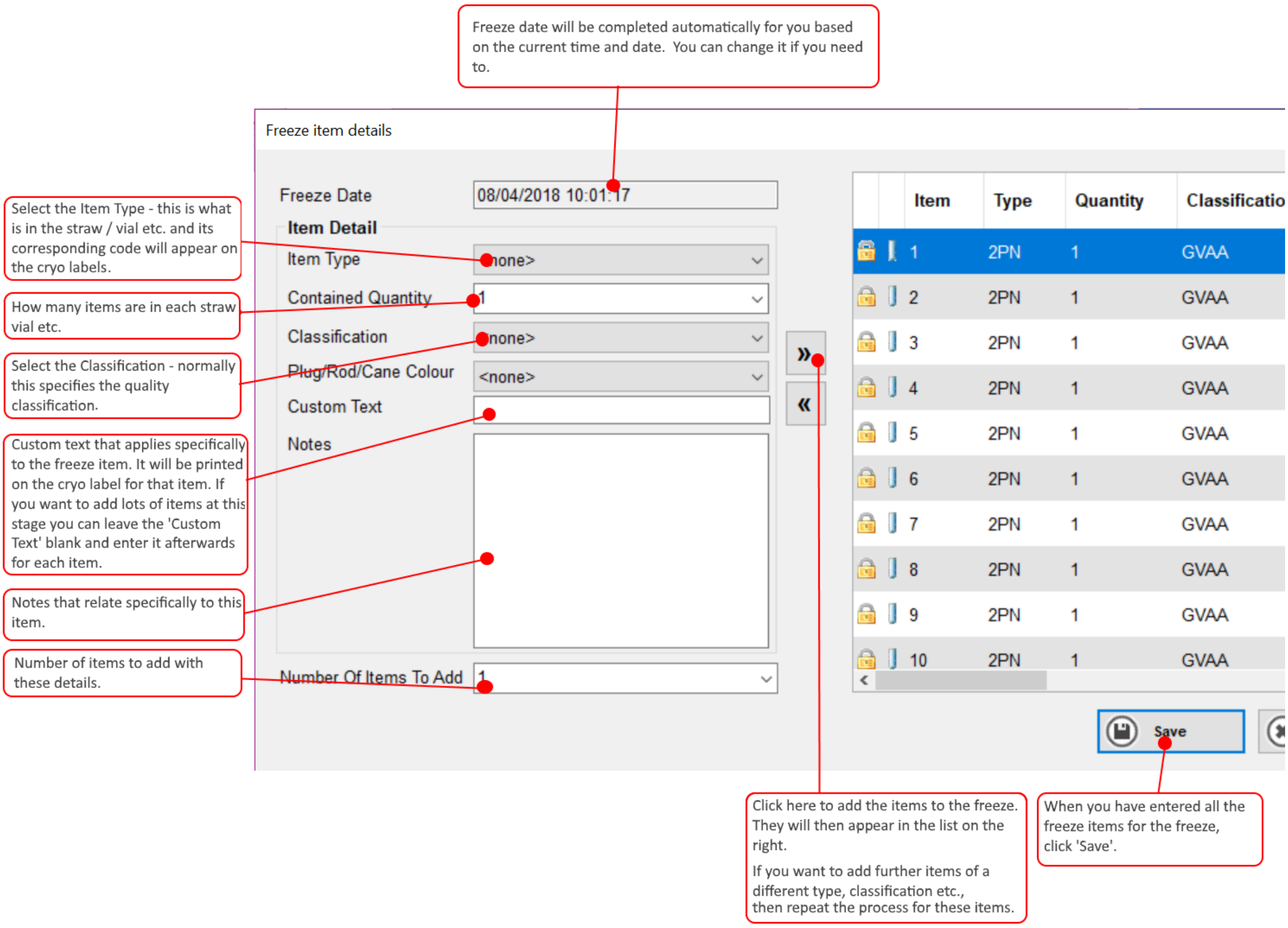
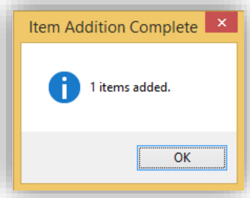


- A pop up window will be displayed showing Item(s) added



- 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 Editing freeze items

- You can edit a freeze item by double clicking on it or by selecting it and clicking the **Edit** button.

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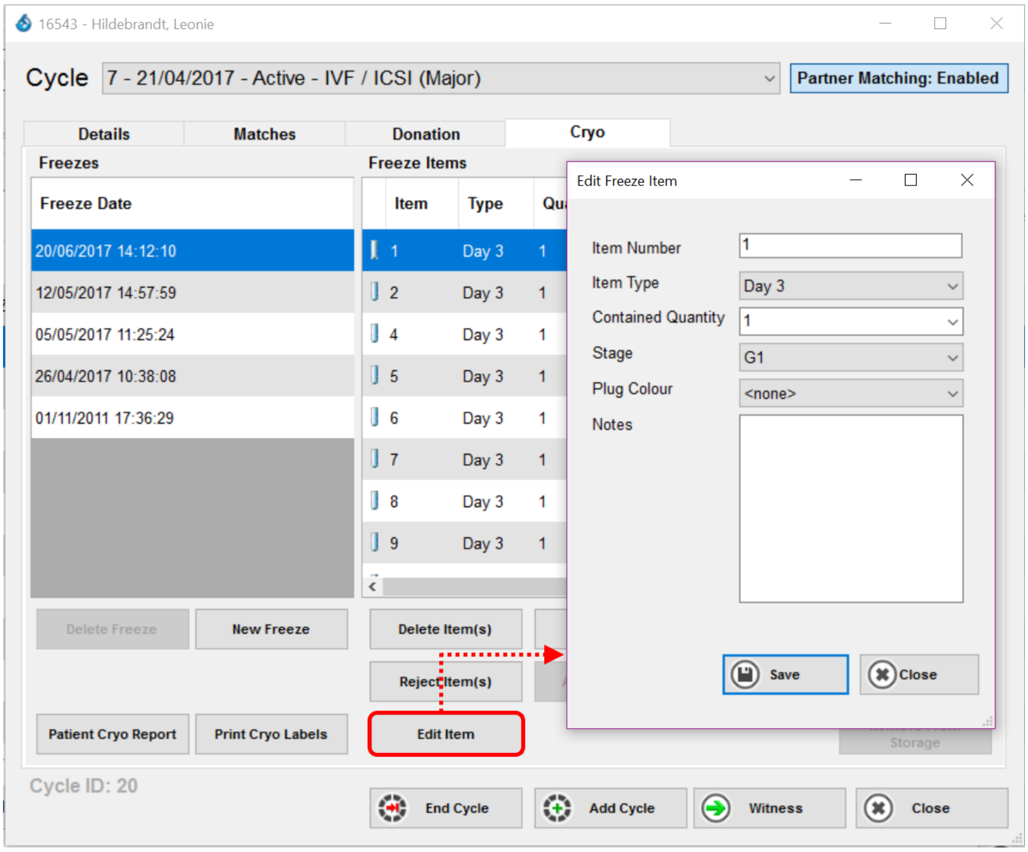
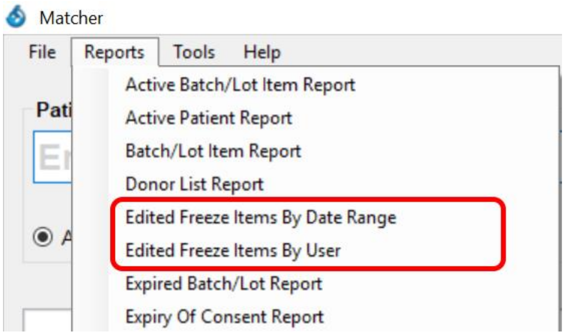


- Note that you can re-number freeze items as long as there are no two items with the same number.

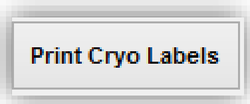
If you need to create freeze items with non-consecutive item numbers (e.g. embryos 4,5 and 7) you can create the number of items required and then edit the items to re-number them as required.

All changes made to cryo items are audited, including who made the change, when and what they changed. There are two reports available on the **Reports** menu allowing you to view all changes made to cryo items in a specific date range or by a specific user.



16.3 Printing cryo labels

- Select the Print Cryo Labels button



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- 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

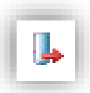
16.4 Allocating freeze items to cryo storage

- 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

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

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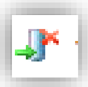
16.6 Reject item(s)

- 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



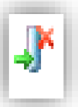
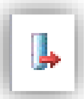
- There will be a red cross displayed next to the item to indicate this item has been rejected

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

16.8 Cryo status

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

Image	Process
	Item not currently in storage
	Item currently in storage
	Rejected item currently in storage
	Item that has been removed from storage

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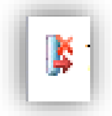
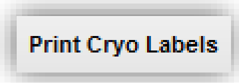
	Rejected item that has been removed from storage

16.9 Printing cryo labels

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



- The 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

17. Procedure management

17.1 Overview

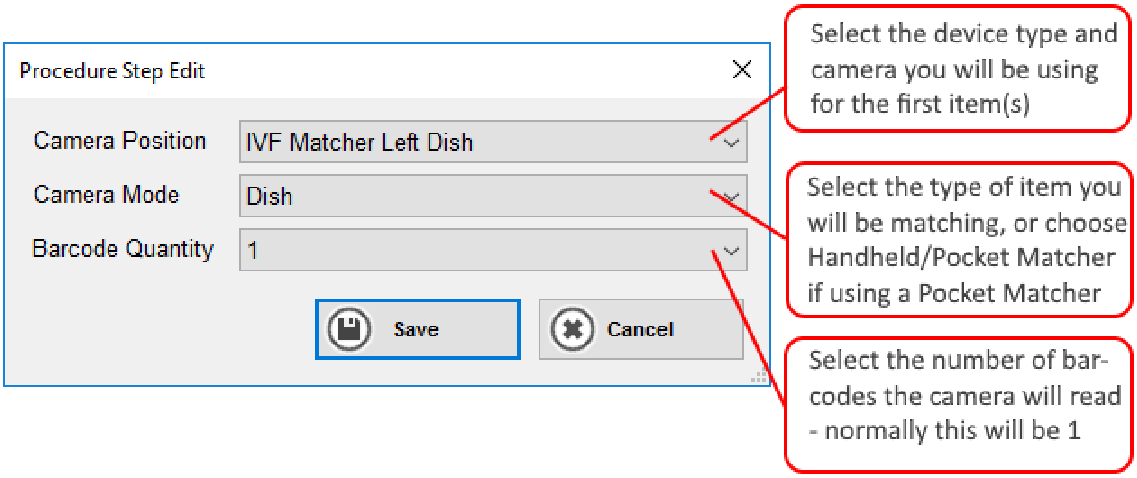
A procedure is a witnessing step within a process, such as checking a patient wristband against an oocyte collection dish. All witness steps, or procedures, are pre-configured in Matcher before you do any witnessing so that Matcher knows how many barcodes to expect and which camera or device type you 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 (witness step)

- 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.

The list of procedure types, which allow you to categorise your procedures, is configurable. See Matcher type management for more details.

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
- 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

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- 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

18. Process mapping

18.1 Process mapping – overview

A process map is a sequence of procedures (witnessing steps) configured in the order they are normally carried out as per your 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.

You can create several ‘routes’ within your process map to represent different ways you can complete a process using different dishes, straws etc. For example, when cryopreserving embryos, you could have varying numbers of embryos. By adding different routes, you can represent the different numbers of straws you might need to use as shown below:

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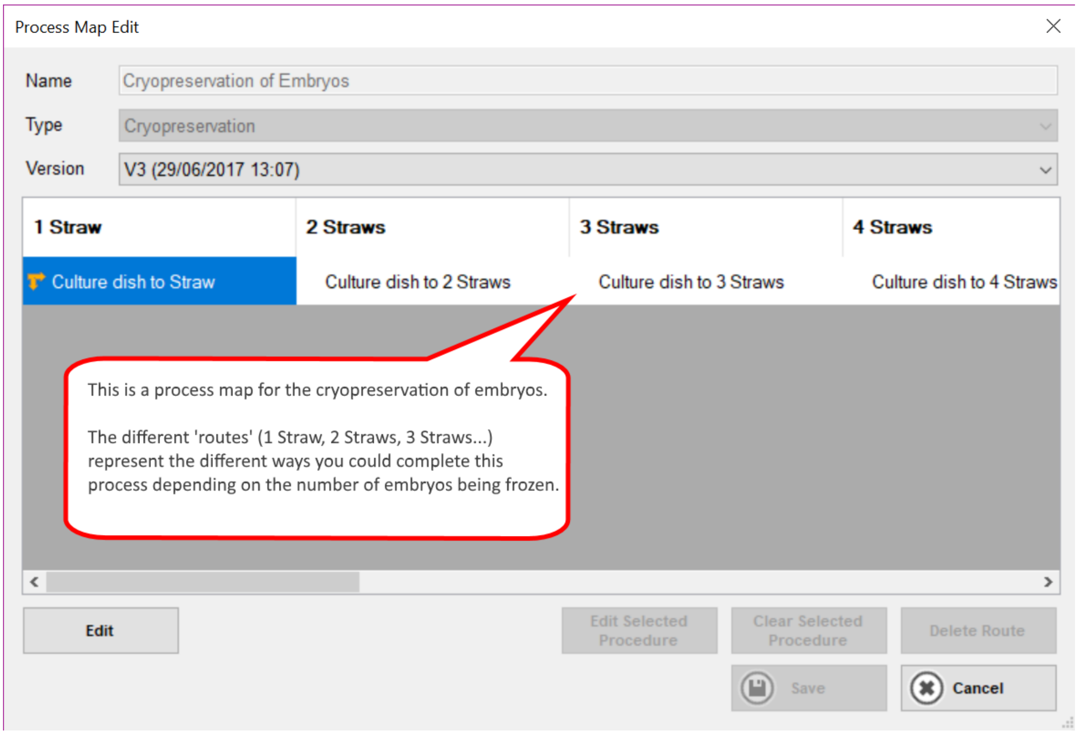

You can organise your process maps into categories (process map types). These categories are configurable and should be set up before creating your process maps. See Matcher type management for information on how to do this.

18.2 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, click the **Edit Selected Procedure** button

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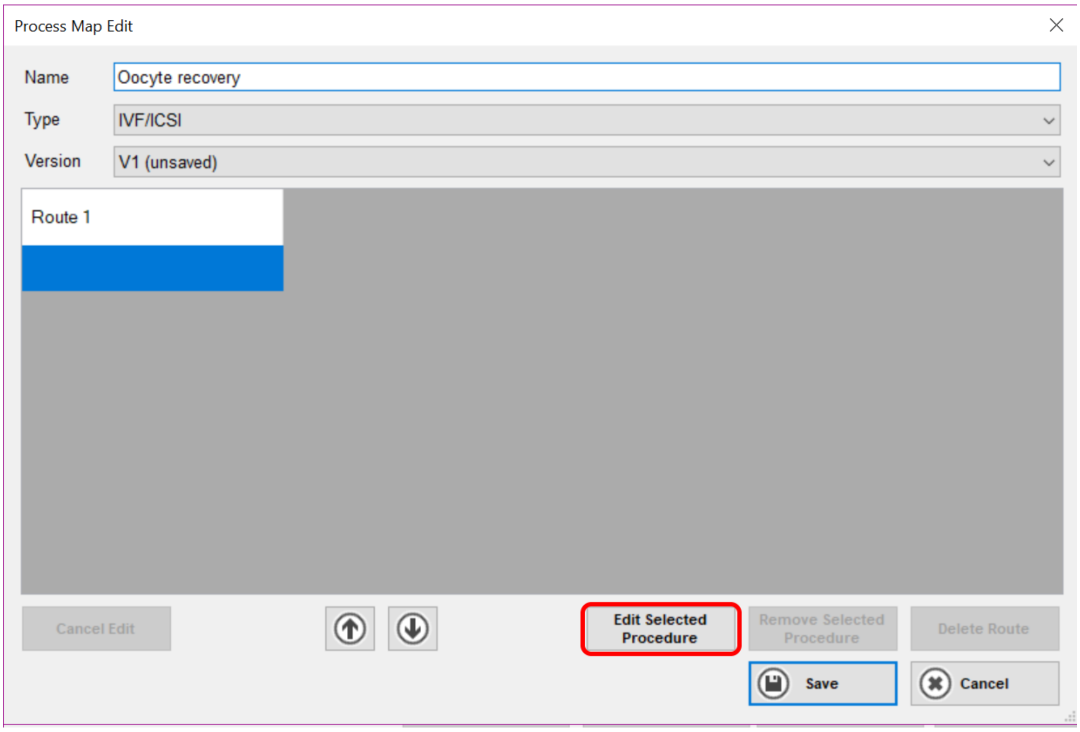
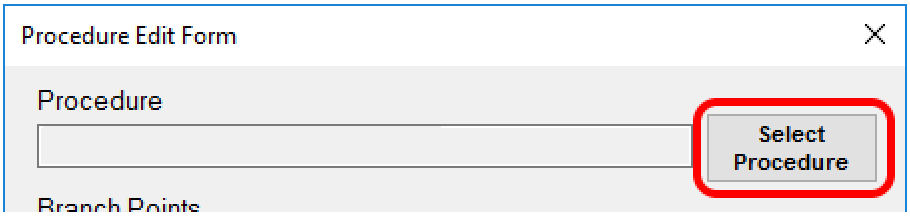


- Click the **Select Procedure** button:



- 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 Adding new routes and branch points section describes how to add other routes and branch points

- The diagram below illustrates a completed process map

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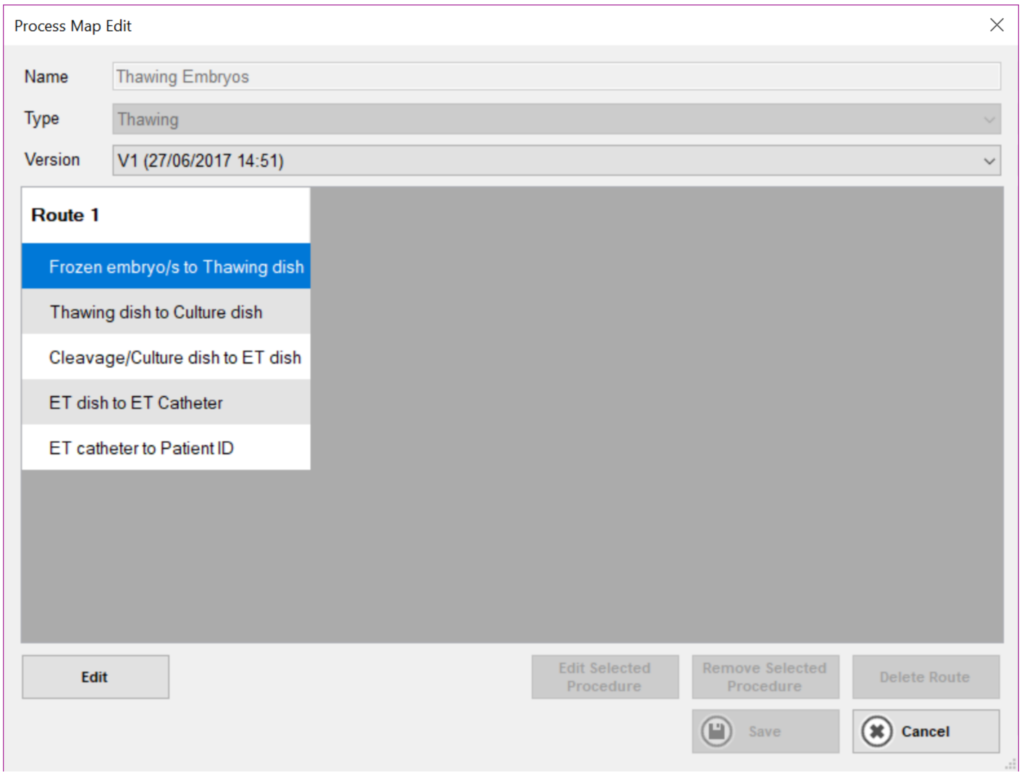
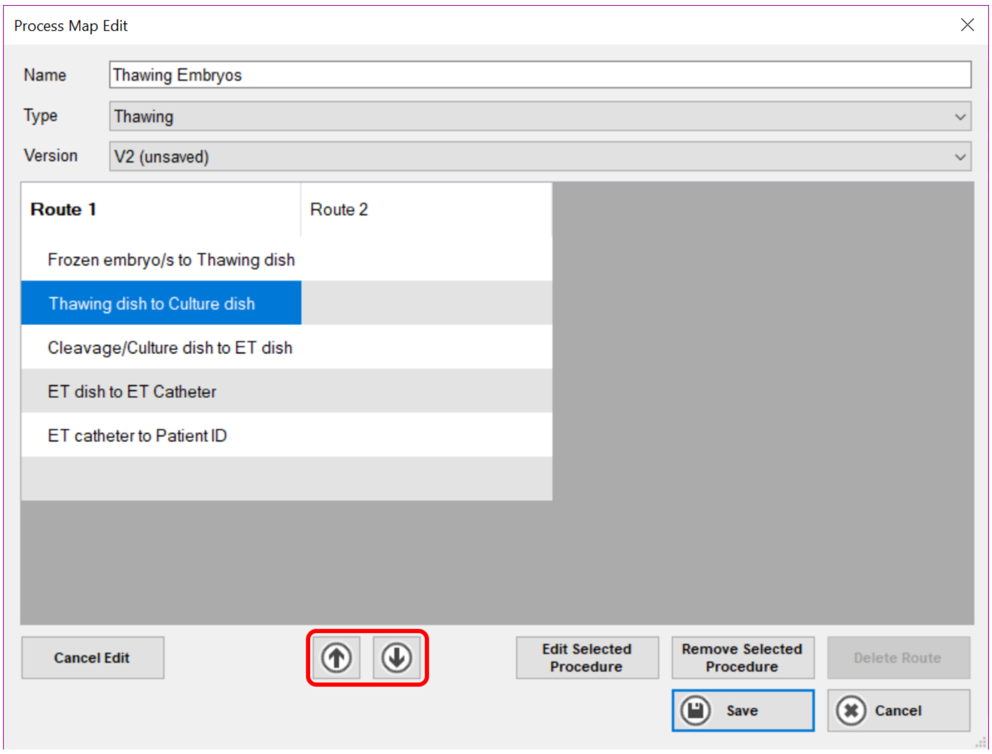


18.3 Moving procedures within a process map

You can rearrange procedures whilst editing a process map by moving them up and down within a route.

- Select the procedure you want to move and then click the **UP** or **DOWN** button as required.



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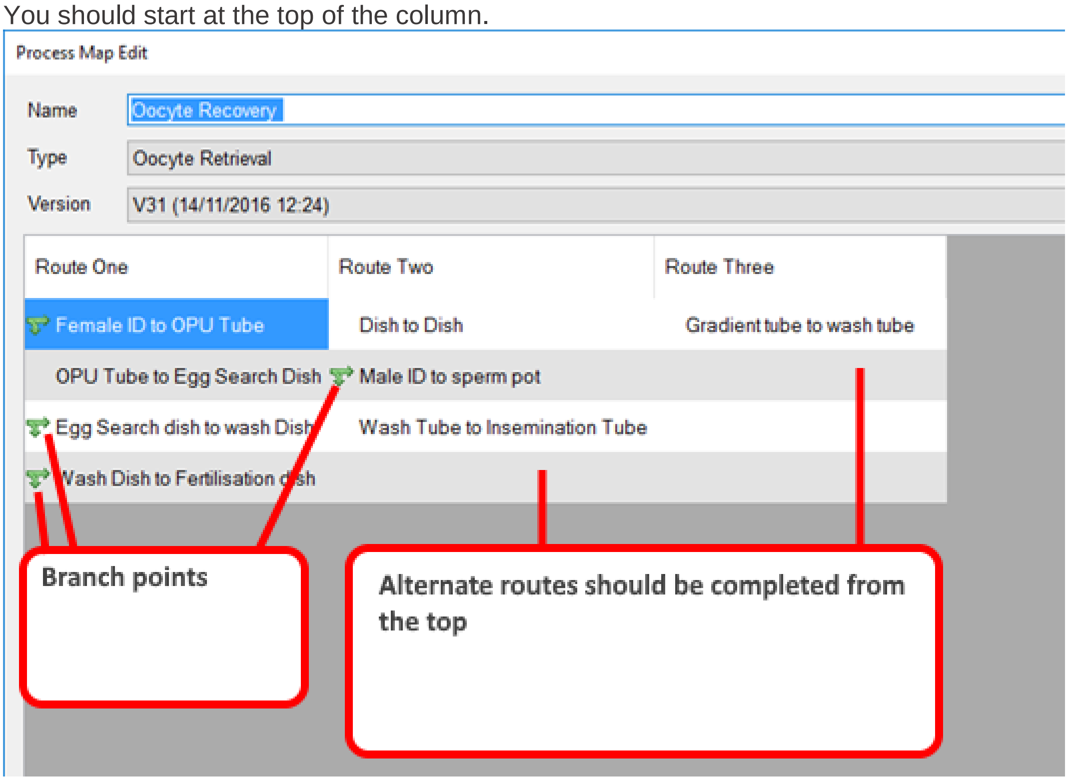
- If you need to ***insert a procedure*** into a process map, insert it at the bottom of the relevant route and then use the UP arrow to move it to the correct position.

18.4 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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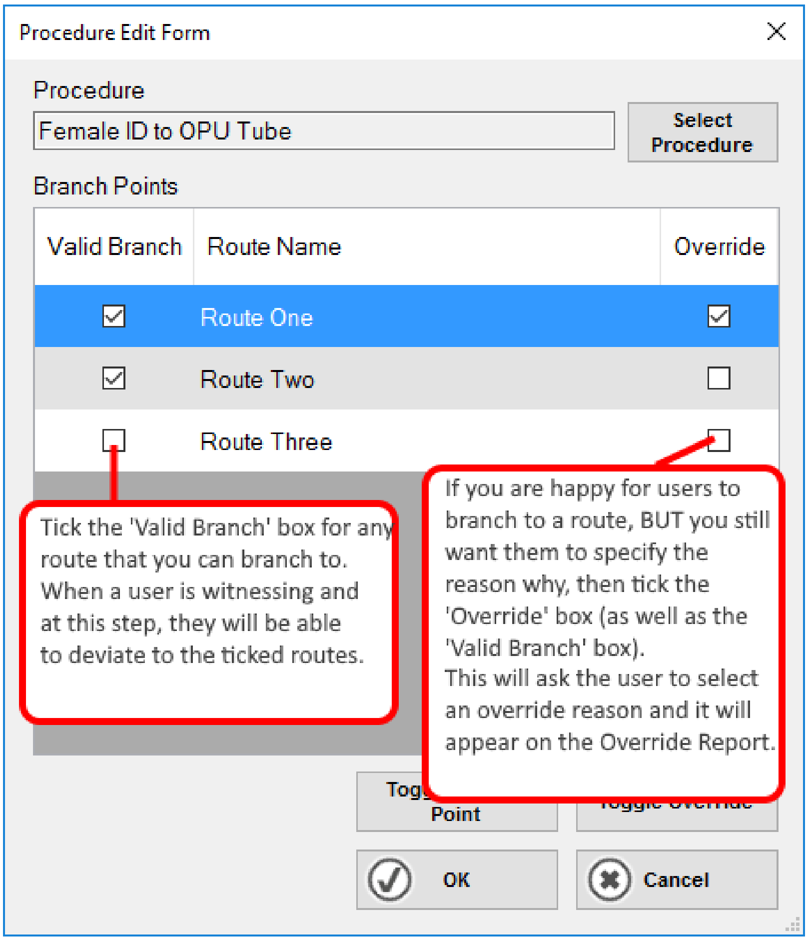

18.5 Editing an existing process map

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.

18.6 Editing witness steps and branch points in a process map

- Follow the steps described above in 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.
- 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**.

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- 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.

18.7 Removing a witness step in a process map

- Follow the steps described above in Editing an existing process map.
- Select the witness step to be cleared within the process map.
- Click the **Remove Selected Procedure** button
- Once all the edits have been made, click the **Save** button

18.8 Deleting the entire process map route

- Follow the steps described above in 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

18.9 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. User management

19.1 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

19.2 Selecting a user for editing

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- 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

20. Matcher type management

20.1 Matcher types

Matcher types are the configurable drop-down lists in Matcher, such as *donor types*, *procedure types* and *freeze item types*. You can find a list of the Matcher Types that you can edit below along with instructions for updating the options available.

Only users with **Administrator** access can update Matcher types.

Matcher type name	Where used	Description
Clinic name	No match result screen (where a no match results from a unique barcode from a different clinic being scanned)	Where unique barcodes are used and a barcode is scanned from a different clinic, this allows different clinics in a group to be identified.
Consent type	**Consent type** field on the **Freeze details** screen	Can be used to describe how consent was provided.
Cryo freeze item type	**Item type** field on the **Freeze item** screen	Used to describe the freeze item with as much granularity as you like. The **Code** is printed onto cryo labels.
Cryo freeze sub type	**Freeze Sub-Type** field on the **Freeze Details** screen	Generally used to describe the contents of a freeze at a high level. E.g. oocyte or sperm
Donor type	**Donation type selection** when linking a donor to a patient. Also the **Donation Type** field on the **Procedure Edit** screen.	Used to define the type of donor linked to a patient. Where donor material is matched, this can only be where the **Donation Type** on the procedure matches the **Donation Type** of the donor. For example, a sperm donor's material can only be matched in procedures where the **Donation Type** = Sperm.
No match reason	**No match** field on the match result screen where you get a no match, wrong patient or wrong item result.	Use to specify a reason for the no match. **Is reason text required** should be checked to force the user to enter additional explanatory text.
Override reason type	**Override reason** field when selecting a step out of sequence when witnessing. Applies to Pocket Matcher and PC application.	Used to provide a reason for not following the sequence of witnessing steps pre-defined within the process map.
Plug colour type	**Plug colour field** on the **Freeze item** screen.	Used to specify the plug colour used for the item(s).

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Procedure type	**Procedure type** field on the **Procedure edit** screen.	Allows you to categorise procedures and helps to locate the correct procedure when editing process maps.
Process map type	**Process map type** field on the **Process map edit** screen.	Allows you to categorise process maps and makes it easier to locate the correct process map when witnessing.
Product manufacturer type	**Product manufacturer** field on the **Batch/lot edit** screen.	Allows you to specify a manufacturer for a product which is searchable in **Batch/lot management**.
Product type	**Category** field on the **Batch/lot edit** screen.	Allows you to categorise products and makes it easier to locate the correct product in **Batch/lot management**.
Reason for removal type	**Storage removal reason** when removing a cryo item from storage.	Allows you to specify a reason for removing a cryo item from storage.
Reason for storage type	**Reason for storage** field on the **Freeze details** screen.	Allows you to specify a reason for freezing items.
Stage type	**Stage** field on the **Freeze item** screen.	Allows you to specify the stage of an embryo at the time of freezing.

20.2 Editing Matcher types

Each install or upgrade comes with a default list for each Matcher type; however you may want to customise these for your own clinic, to add or remove items, or to translate the options to a language other than English.

The example below focuses on Plug colour type, but the same method applies to all of the Matcher types listed above.

- Click **Tools** > **Matcher type management**
- Double click on the Matcher type you want to edit, e.g. **Plug colour type**
- The list of current options will load

- **To add a new option,** click the **Add** button, enter a name for the new option (e.g. 'Pink'), click **OK** then click **Save**

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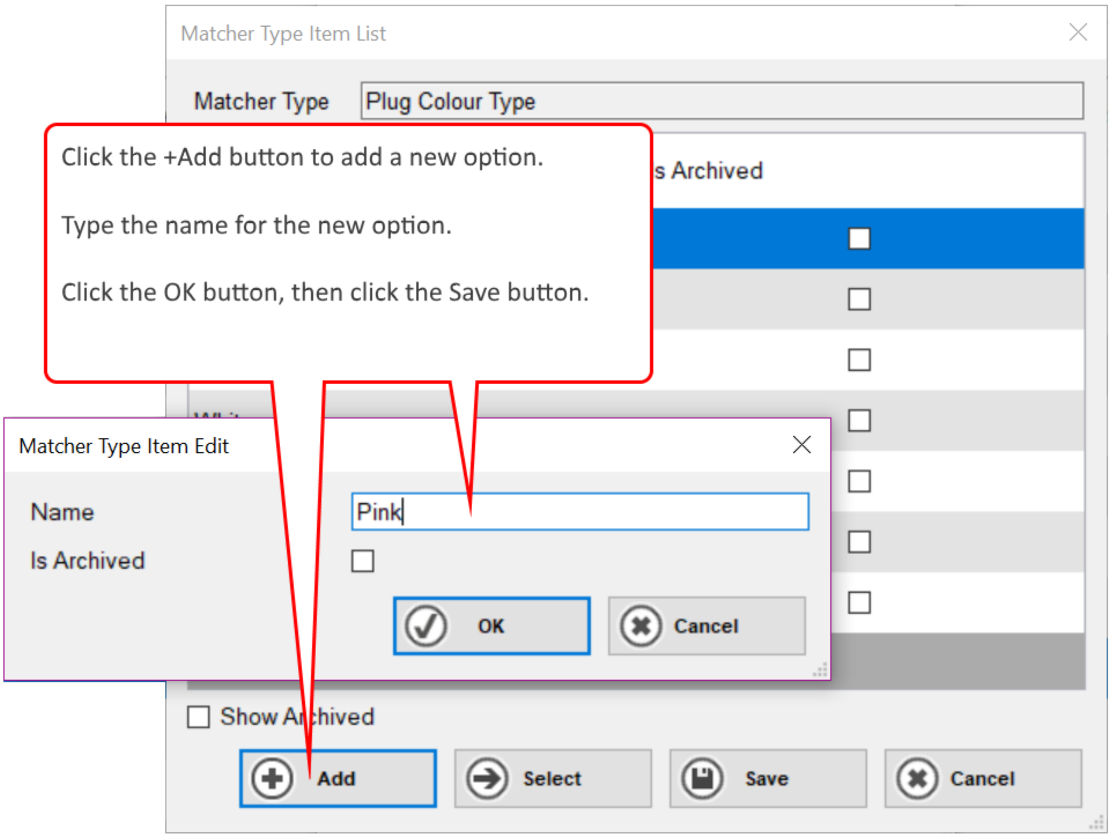

- **To edit an option**, double-click on the option you want to edit, update as required, click **OK** then click **Save**

- **To archive an option,** double-click on the option you want to archive and tick the **Is Archived** box, then click **OK** and then click **Save**
  Archiving an option leaves it in the database and linked to any records where that value has previously been selected, but ensures it cannot be selected going forward.

Other options

Some Matcher types have additional fields that can be completed as follows:

Matcher type name	Additional field	Description
Clinic name	Number	Used to record the unique Matcher reference number for a linked clinic.
Cryo freeze item type	Code	The code is printed on the cryo label for each item. You should try to limit this to 3 or 4 characters to ensure it will fit on the label.
Donor type	Maximum instances	Determines the maximum number of donors of that type that can be linked to a patient. By default, this is set to 1 for each donor type, so just one sperm, oocyte and embryo donor can be linked to a patient for a particular cycle.
No match reason type	Is reason text required	Where this is ticked and a user selects this reason when they receive a NO MATCH result, they will be prompted to enter further details. Normally this is just ticked for the 'Other' option, but can be ticked for others if you wish.

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21. Settings

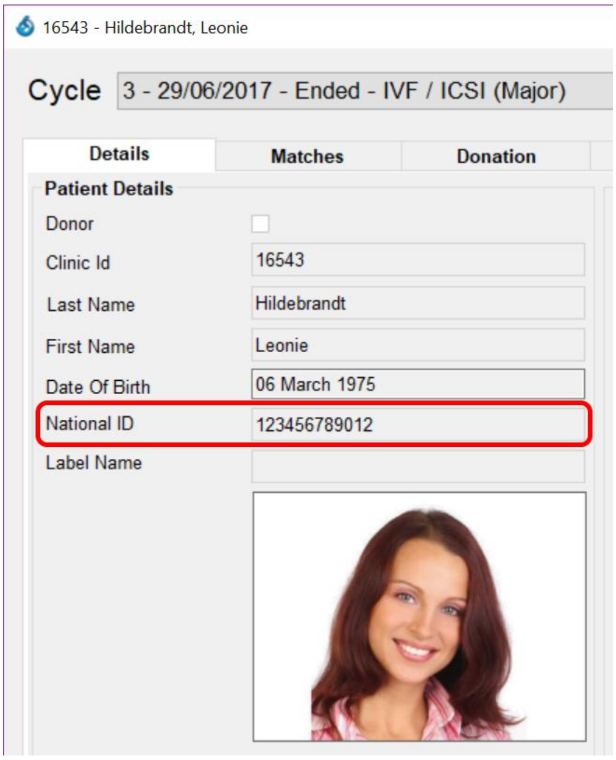
The Settings area of the system is only available to users with **Administrator** access. Here you can set password rules, customise patient ID cards, enable the patient custom field and set refresh and search delay times, amongst other things.

Everything you set in Settings will apply to everyone using the Matcher system in your clinic.

You need to log off and back on again to see the effect of any settings changes.

21.1 Enabling the custom patient field

You can enable an additional custom (text) field to record additional information about patients, for example an additional ID number such as a National ID. This field will appear on the **Patient details** screen and can also be printed on patient ID cards.



To enable this field:

- Click **Tools** > **Settings**
- Select **Patient custom field name** from the list and click **Select**
- Enter the name that you would like to call the field (e.g. National ID) in the **Value** box
- Click **Save** and then **Save** again on the **Settings** screen
- Where **Value** is left blank, the field will not appear on the **Patient details** screen

To add the field to the ID card, see Adding the custom patient field to patient ID cards section.

21.2 Changing the logo on patient ID cards

- Click **Tools**> **Settings**
- Double-click on the **ID Card Logo** setting (or click to select it and click the **Select** button)
- Enter the full file path and fiel name in the **Value** field

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- Click **Save**, then **Save** again on the **Settings** screen

21.3 Adding the custom patient field (e.g. National ID) to patient ID cards

If Matcher has been configured at your clinic to use the custom patient field (e.g. to store a national ID), this can be added to photo ID cards.

To display this field on the ID cards:

- Click **Tools** > **Settings**
- Select **Show Patient custom field on ID card** from the list and click the **Select** button
- In the **Value** box, type *true*
- Click **Save** and then click **Save** again on the **Settings** screen

The field will appear on the ID cards as shown below:

21.4 Adding custom text to your patient ID cards

You can add your own text to the blue bar at the top of the patient ID cards. You could, for example, add your clinic's website address or strapline. To do this:

- Click **Tools** > **Settings**
- Select **ID Card text** from the list and click the **Select** button
- In the Value box, type the text you'd like to appear at the top of your ID cards
- Click **Save** and then click **Save** again on the **Settings** screen

21.5 Single patient ID card

You can choose to have ID cards showing patient and partner details or just patient details. The two options are shown below:

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To change the ID card layout for your clinic:

- Click **Tools** > **Settings**
- Select **Enable solo ID card** from the list and click the **Select** button
- In the Value box, type *true* to have just the patient details on the ID card, or *false* to have both patient and partner details
- Click **Save** and then click **Save** again on the **Settings** screen

21.6 Enabling label names

By default, all Matcher labels print patient names in the format *surname*, *first name*. You can override this on a per patient basis by entering an alternative name into the **Label name** field.

Where the field is left blank, labels will be printed in the usual format.

To enable the Label name field:

- Click **Tools** > **Settings**
- Select **Enable label name** from the list and click the **Select** button
- In the Value box, type *true* (type *false* to disable it)
- Click **Save** and then click **Save** again on the **Settings** screen

We can populate the Label name for all patients in Matcher with Firstname Surname (e.g. Leonie Hildebrandt). Please contact us to request this.

21.7 Updating the cycles remaining alert

Matcher will tell you when you have (normally) 20 cycles left for each type of cycle. If you want to be alerted when you have more than 20 cycles remaining you can update this as follows:

- Click **Tools** > **Settings**
- Select **Cycle alert count** from the list and click the **Select** button
- In the **Value** box, type the number cycles remaining for the alert (e.g. for Matcher to alert you when you have 40 cycles remaining, type 40 into the box)
- Click **Save** and then click **Save** again on the **Settings** screen

21.8 Enable or disable blank passwords

Whilst we recommend that all Matcher users have their own secret password for accessing Matcher, there is an option to allow blank passwords, which would allow users to log in using their user name only. To allow blank passwords:

- Click **Tools** > **Settings**
- Select **Allow blank passwords** from the list and click the **Select** button
- In the **Value** box, type *true* to allow blank passwords (or *false* to disable blank passwords)
- Click **Save** and then click **Save** again on the **Settings** screen

Allowing blank passwords will not change or remove any passwords. All passwords will remain as they were. To remove passwords, users will need to change their own password (or administrators can update other users' passwords).

21.9 Setting minimum password length

You can set a minimum password length for all Matcher users. You can use this in conjunction with the Enable or disable blank passwords and Minimum password character types settings to enforce your own clinic's password policy. To set a minimum password length:

- Click **Tools** > **Settings**
- Select **Minimum length of passwords** from the list and click the **Select** button
- In the **Value** box, type the minimum number of characters you want to allow for user passwords
- Click **Save** and then click **Save** again on the **Settings** screen

Note that you should also ensure the **Require complex passwords** setting is set to true when enforcing a minimum password length.

21.10 Setting minimum password character types

You can force all matcher passwords to contain a minimum number of character types (from UPPER CASE, lower case, numbers and symbols). For example, if you set the minimum character types setting to 2, all passwords will need to contain at least two of these character types. You can use this in conjunction with the Enable or disable blank passwords and Minimum password length settings to enforce your own clinic's password policy. To set the minimum character types:

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- Click **Tools** > **Settings**
- Select **Minimum password character types** from the list and click the **Select** button
- In the **Value** box, type the minimum number of characters you want to allow for user passwords
- Click **Save** and then click **Save** again on the **Settings** screen

Note that you should also ensure the **Require complex passwords** setting is set to *true* when enforcing a minimum password length.

21.11 Forgetting user names

By default, Matcher will remember the username of the last user logged in and pre-fill their username into the **Username** box when Matcher is next launched. This can be disabled to ensure the **Username** box is always blank as follows:

- Click **Tools** > **Settings**
- Select **Remember last Matcher user** (or **Remember last Pocket Matcher user**) from the list and click the **Select** button
- In the **Value** box, type *false*
- Click **Save** and then click **Save** again on the **Settings** screen

22. Setting and changing passwords

22.1 Changing your own password

- Click **Tools** > **Change Password**
- Type in your old password
- Type in new password then confirm it again
- Click **OK**
- Next time you log in you will need to supply your new password

22.2 Changing another user's password

This feature is available to administrators only.

- 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

23. Replacement toners and consumables

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23.1 How to replace toners or ID card dye films

- To order replacement toners from Matcher please email matcher@imtinternational.com
- Once you receive your replacement toner, follow the instructions on the printer, toner or dye film box
- Please contact us if you have any issues

23.2 How to replace ID card cleaning kits and ID photo cards

- To order replacement ID cards and cleaning kits please email matcher@imtinternational.com
- Once you receive the cleaning kit, follow the instructions that come with it
- You can also view instructions using the following link http://www.evolis.com/sites/default/files/atoms/files/userguide_ku-zen1-038-eng-a1_1.pdf
- Please contact us if you have any issues and we can talk you through the process

23.4 How to order new label sheets (cryo and laboratory)

- To order replacement label sheets please email matcher@imtinternational.com and specify the type and quantity of labels you require

24. 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
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

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	• 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.
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
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 • 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

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	• Click OK • Click X to close settings
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.
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.

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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 require training on Matcher	Please call IMT International Ltd on +44 1829 771 327 or visit our support portal by clicking **Help** > **Online Resources** > **Support portal** within matcher. There you can browse the user guide, additional how-to guides and videos and submit requests for assistance.
I cannot find answers to my issue	Please call IMT International Ltd on +44 1829 771 327 or visit our support portal by clicking **Help** > **Online Resources** > **Support portal** within matcher. There you can browse the user guide, additional how-to guides and videos and submit requests for assistance.
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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