

## **Matcher v5.3.0 Quick Start Guide**

This guide is the quickest way for new users to begin using the Matcher Electronic Witnessing system.

This guide covers basic use of the desktop and Pocket Matcher witnessing applications.

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1. Logging in
2. Adding a patient
3. Adding a patient cycle
4. Printing label sheets
5. Witnessing

**For comprehensive training and information about the system, please refer to the Matcher elearning courses.**

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## 1. Logging in

### Desktop application

Double-click on the Matcher icon illustrated below to load the Matcher application logon screen:



Enter your username and password (this will have been provided to you prior to the installation of the system) into the fields and click OK:

### Pocket Matcher application

Press on the Matcher icon to load the Matcher application logon screen:



Enter your username and password (this will have been provided to you prior to the installation of the system) into the fields and click OK:

This guide does not cover: Logging in with a fingerprint or scanning an ID card to log in. To learn about this functionality, please refer to your assigned e-learning courses.

## 2. Adding a patient

### Desktop application

From the patient search screen, click the Add patient button in the bottom left corner:



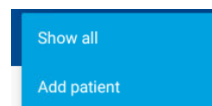
Enter the required patient information into the fields that are displayed:

A screenshot of a web form for adding a patient. It includes fields for Last name, First name, Patient ID, Date of birth, and National id. There are also checkboxes for Donor and a Save button at the bottom right.

Click Save to update Matcher with the new patient's record.

### Pocket Matcher application

From the patient search screen, click on the three dots in the top right corner of the screen and select the Add patient button:



Enter the required patient information into the required fields:




A screenshot of a mobile app form for adding a patient. It includes fields for Last name, First name, Patient ID, Date of birth, and National id. There is also a Donor checkbox.

Click the disk icon to update Matcher with the new patient's record:



This guide does not cover: Importing patient records from an EMR, capturing patient fingerprints, linking patients to partner records. To learn about this functionality, please refer to your assigned e-learning courses.

### 3. Adding a patient cycle

| Desktop application   | Pocket Matcher application   |
|---|--|
| <p>From the patient card click the Add cycle button in the bottom left corner:</p>  <p>Select the desired cycle type from the options that appear on screen and click OK</p> <p>Confirm the cycle partner for this cycle by checking the checkbox against the desired card. Uncheck all checkboxes if no cycle partner is required:</p> <p><input checked="" type="checkbox"/> Cycle partner</p> <p>Review the cycle plan screen that appears, and when happy with the selected processes, click OK.</p> <p>The patient will now have an active cycle within Matcher and the Witness button will become available for selection.</p> | <p>From the patient record, click the add cycle icon:</p>  <p>Select the desired cycle type from the options that appear on screen</p> <p>Confirm the cycle details including the cycle partner and the expected day 0 by clicking the confirm button:</p>  <p>Matcher will display an alert to confirm the cycle has been added. The patient will now have an active cycle within Matcher and the Witness button will become available for selection.</p> |
| <p><u>This guide does not cover:</u> Changing cycle types, amending cycle plan templates. To learn about this functionality, please refer to your assigned e-learning courses.</p>  |  |

## 4. Printing label sheets

### Desktop application

**Non-cryo labels:** From the patient card click the Non-cryo labels button:



Select the print option that appears, confirm the printer name and click OK.

**Cryo labels:** From the patient card, select the Cryo store icon:



Highlight the required freeze by selecting a row which contains data in the Freeze Date column:

| Freeze date         | Cryo material type value | Reason for storage      |
|---------------------|--------------------------|-------------------------|
| 03/11/2022 10:57:51 | Embryo                   | Embryos for fertilit... |

N.B. The freeze must contain all embryos to be frozen.

Click the Cryo labels button:



Select the print option that appears, confirm the printer name and click OK.

### Pocket Matcher application

**Non-cryo labels:** From the patient card, click the print icon:



Select the Non-cryo label button:



A Non-cryo label sheet for this patient will now print from the pre-designated printer.

**Cryo labels:** From the patient card, select the cryo icon:



Click the details button to list the freezes that have been performed against this patient:



Press the printer icon against the relevant freeze event:



A Cryo label sheet for this patient freeze will now print from the pre-designated printer.

This guide does not cover: Aligning label sheets, changing report types. To learn about this functionality, please refer to your assigned e-learning courses.

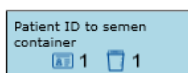
## 5. Witnessing

### Desktop application

After adding a cycle and printing the required label sheet(s) for the patient, from the patient card, click the Witness button:



Matcher will then load the pre-witness screen, displaying all available procedures and witness routes. Select the desired witness step by clicking on it so that it is highlighted in blue.



The numbers and icons within each witness step box indicates how many Matcher barcodes need to be scanned to complete that procedure.

Prior to starting witnessing, you will need to make sure the correct Non-cryo or Cryo Matcher label sheets have been printed off, and the correct Matcher labels have been applied to the corresponding items of labware.

Click the Witness button to activate the Mini Matcher scanner. The device's red light will turn on automatically. You can now begin scanning the pre-labelled items.



Once the required number of barcodes have been scanned, Matcher will display a witness result.

A result of Match confirmed/check complete will allow you to: Click continue, repeat or log off.

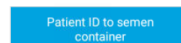
A result of No Match/Wrong Patient/Wrong Item/Wrong UniTrack Item will require you to click on the Select reason button and choose an option from the list of reasons that are displayed:

### Pocket Matcher application

After adding a cycle and printing the required label sheet(s) for the patient, from the patient card, click the Witness icon:



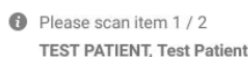
Matcher will then load the pre-witness screen, displaying all available procedures and witness routes. The next expected step will be highlighted in blue:



Swipe to select alternative witnessing routes within that process. Select the desired witness step by pressing on the screen.

Prior to starting witnessing, you will need to make sure the correct Non-cryo or Cryo Matcher label sheets have been printed off, and the correct Matcher labels have been applied to the corresponding items of labware.

The witness screen will display how many items need to be scanned:



Press the blue physical buttons on the side of the device, or press the blue Scan button on screen to activate the device's scanner:



You will have the option to confirm or re-scan each barcode scan.

When the minimum number of scans has been captured, a blue arrow will become available. Pressing this arrow will display a witness result:





After the reason has been selected, you can click continue, repeat or log off. Matcher will now ask you to perform the same witness step again until a Match confirmed witness result has been achieved.

A result of Match confirmed/check complete will allow you to: Click continue or repeat the witness step

A result of No Match/Wrong Patient/Wrong Item/Wrong UniTrack Item will require you to click on the Select reason button and choose an option from the list of reasons that are displayed:

Select reason

After the reason has been selected, you can click continue or repeat. Matcher will now ask you to perform the same witness step again until a Match confirmed witness result has been achieved.

This guide does not cover: Split witnessing, fingerprint witnessing, donor witnessing, witnessing additional items. To learn about this functionality, please refer to your assigned e-learning courses.