

## Setting Up Automatic Importing in Impact.MD

ImpactMD has an automatic import utility which is called the IEX (Import/Export). This is a Windows service that will monitor a shared folder on the network and import documents into the chart using a pre-specified template.

The first step is to ensure that the IEX service is properly installed on the server.

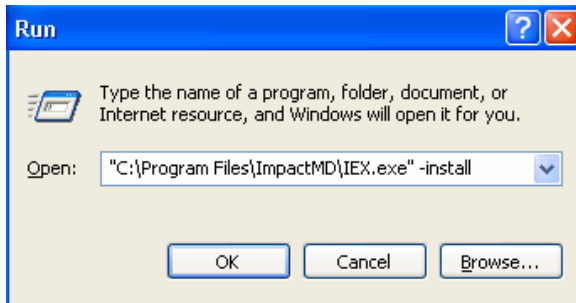
### Installing the IEX

#### **Pre ImpactMD v3.31**

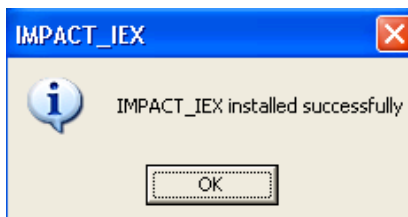
If the IEX has not been installed as a Windows service:

Click **START>>RUN**

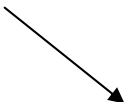
Browse to the root folder of ImpactMD on the server. Select the IEX.exe. Insert a “-install” at the end of the path. The path should be similar to this:

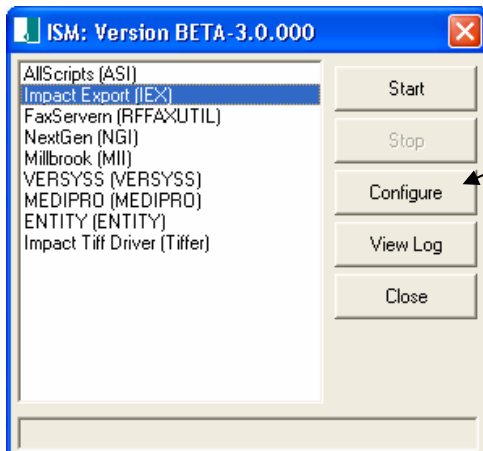


Click OK. You should get the following message:

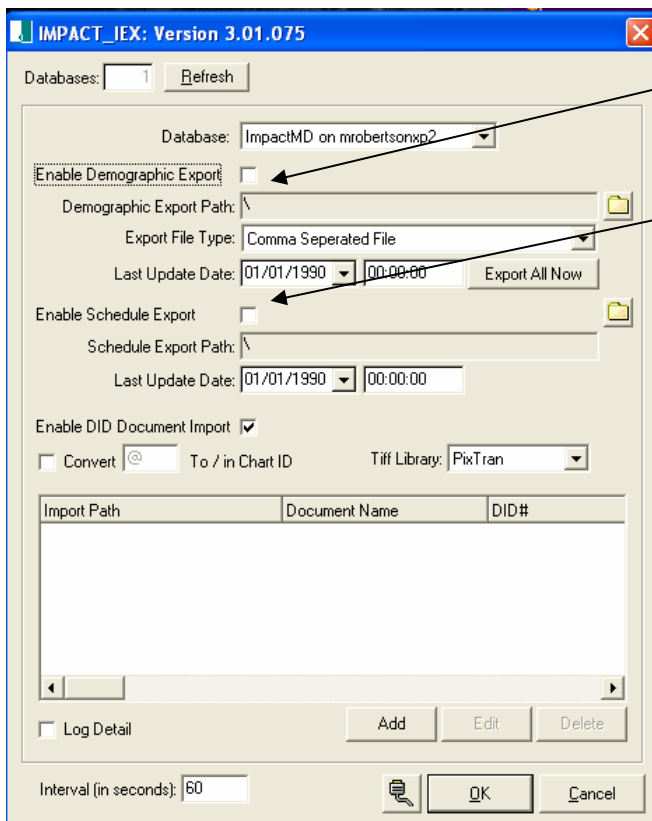


Go to the root folder of ImpactMD. Find the ISM.exe file and double-click. Select “Impact Export (IEX)” from the list and click CONFIGURE:

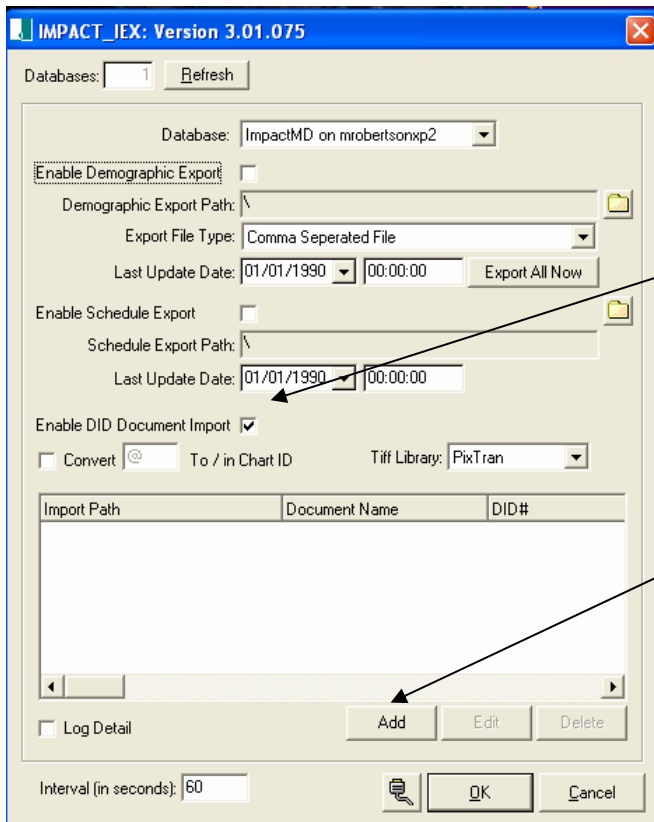




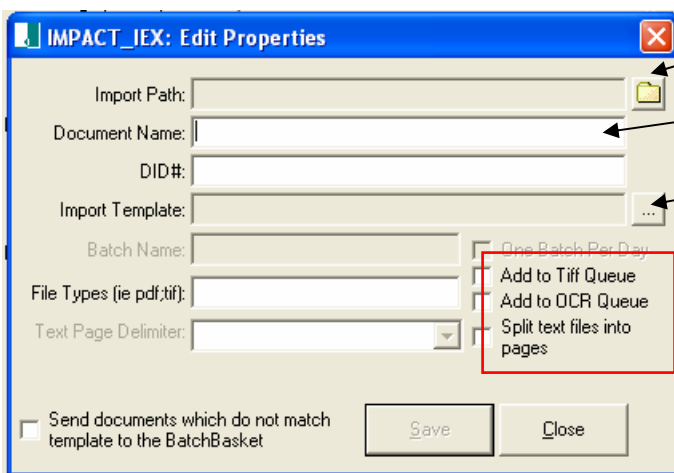
Make sure that “Enable Demographic Export” & “Enable Schedule Export” are unchecked.



Put a check mark in “Enable DID Document Import”. Putting a check mark here enables the document import function. Click “Add”.

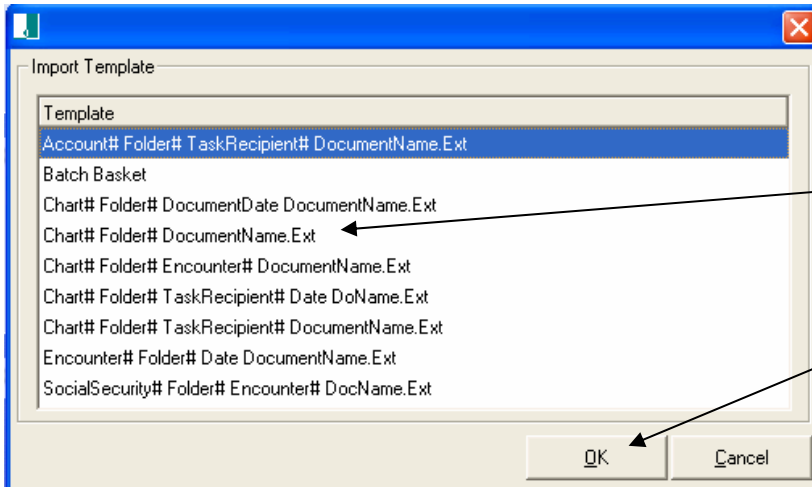


Select the “Import Path” for the documents to be imported. This should be a shared folder on the network. Normally this is a “UNC” path. Put in a “Document Name”. This document name will be ignored if the Import Template you are using will specify a name for the document (but you are required to input a name here no matter). Please note if you have Search.MD, you can also send imported documents to the OCR queue to be processed. If you would like signed off documents (such as Word Transcription documents) to be “Tiffed” upon import, please check “Add to Tiff Queue”. If text files are being imported and they need to come in as separate pages, select “Split Text Files into Pages”.

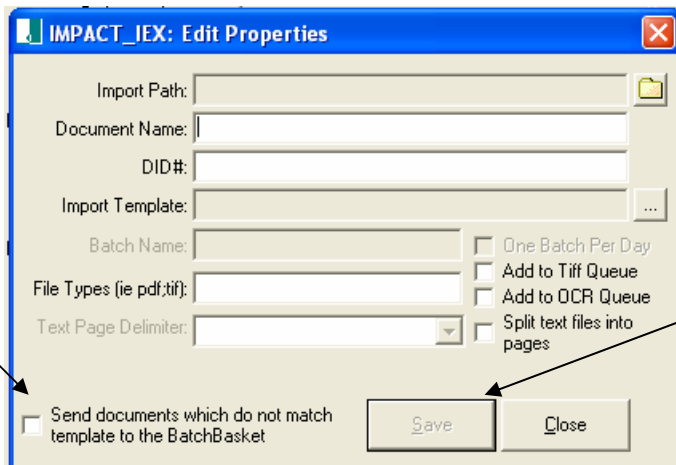


Now click the ellipses button on “Import Template”.

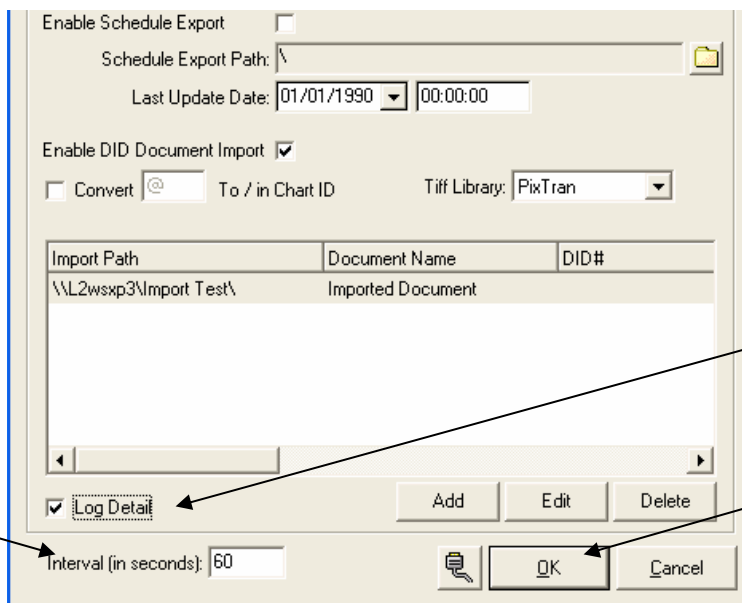
Select the Import Template you will use for this import routine. We will cover creating custom templates later in this document. Click “OK”.



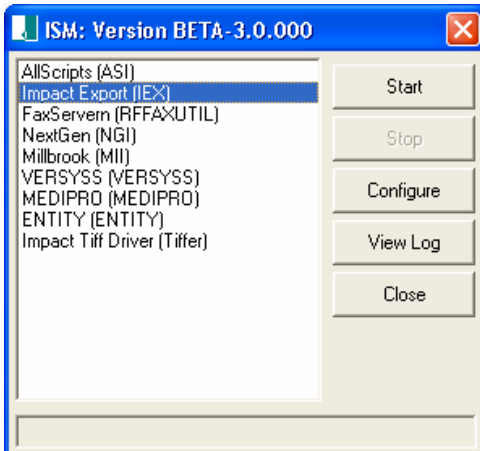
You will need to indicate the file type if you would like IEX to pull in only a certain file type from a folder, i.e. You have a wav file and a Word document coming in from your transcriptionists, if you indicate .doc as your file type, only those documents will be imported. You may select “Send documents which do not match template to the Batch Basket”. This option will send any document that is imported and does not match the specified template format to the Batch Basket. That document can then later be sorted to the correct chart. Click “Save”.



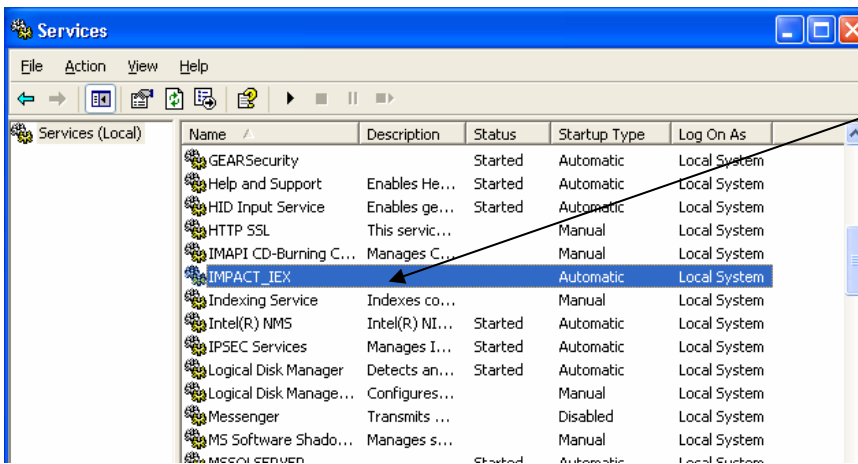
You will now see your new import routine setup in the window. You may add as many import routines as you wish. Each one would need to be pointed to a different folder on the network (import path). You have the option of selecting “Log Detail”. This will create a detailed import log for troubleshooting. The default Interval (in seconds) is set to ‘60’. This means that every 60 seconds, the IEX will look inside the specified folders to see if there is any information to import. The default 60 seconds is the highest number you go set...but you may change this number to a lower setting (30 – 60 seconds is the norm). Click “OK” when done.



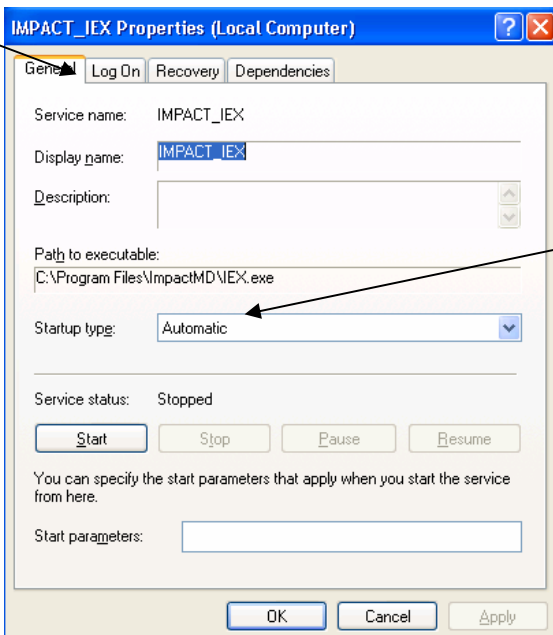
**NOTE:** Do **NOT** “Start” or “Stop” the IEX from the ISM screen. The IEX will malfunction if started from the ISM. Always start and stop the IEX from the Windows Services screen. This does not apply to the IEX in ImpactMD v 3.31.



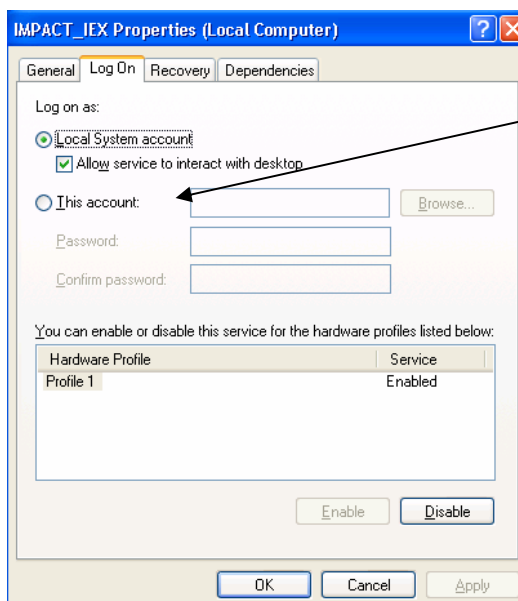
To correctly start the IEX service, go to the Services screen and double-click "Impact\_IEX".



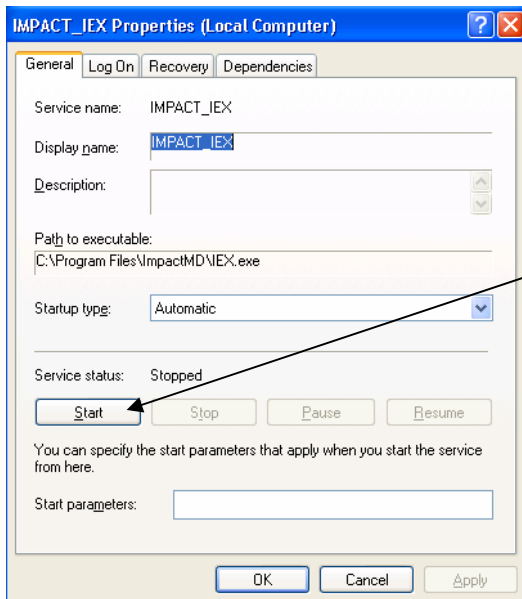
Make sure the "Startup Type" is set to "Automatic". Click the "Log On" tab.



The “Log On” account should be an administrator account that has access to everything on the network. We have seen issues before where the folder that the IEX was pointed to (for importing) was located on another server or PC. If the Log On user does not have appropriate rights, there will be an “access error” when trying to import from this folder.



Click the “General” tab and “Start” the service.



## Installing the IEX

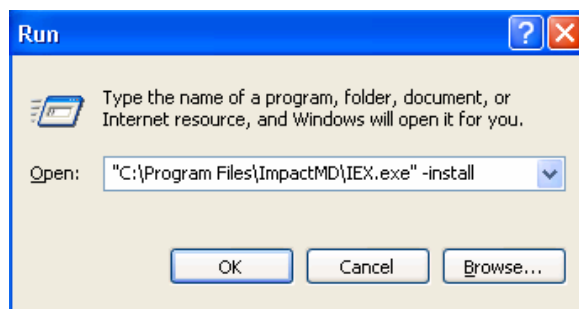
### ImpactMD v3.31

If the IEX has not been installed as a Windows service:

Click **START>>RUN**

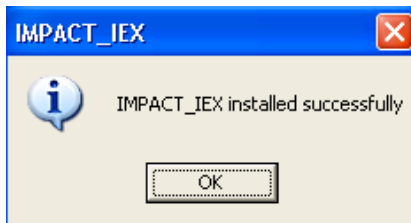
Browse to the root folder of ImpactMD on the server. Select the IEX.exe. Insert a “-

”-

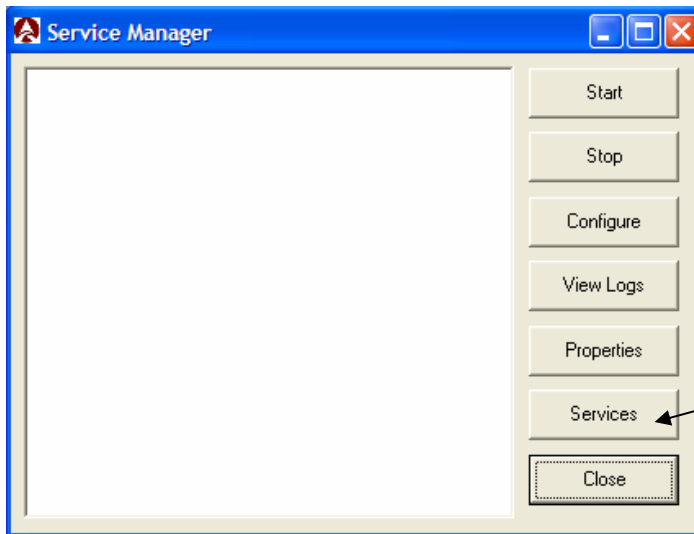


Click OK. You should get the following message:

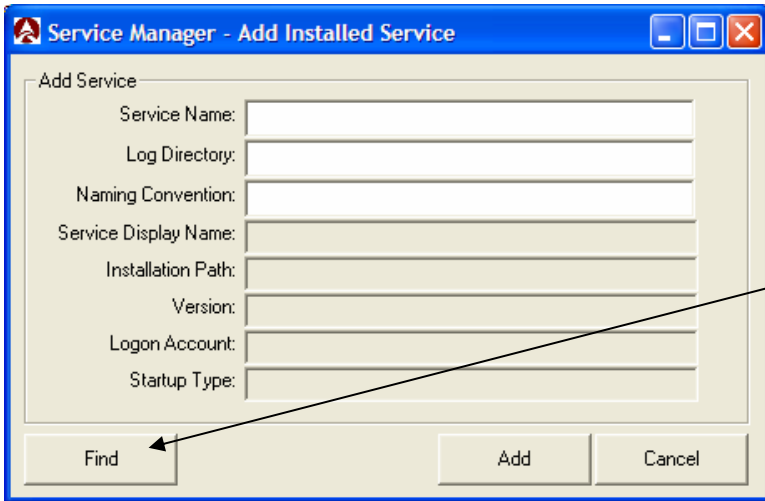




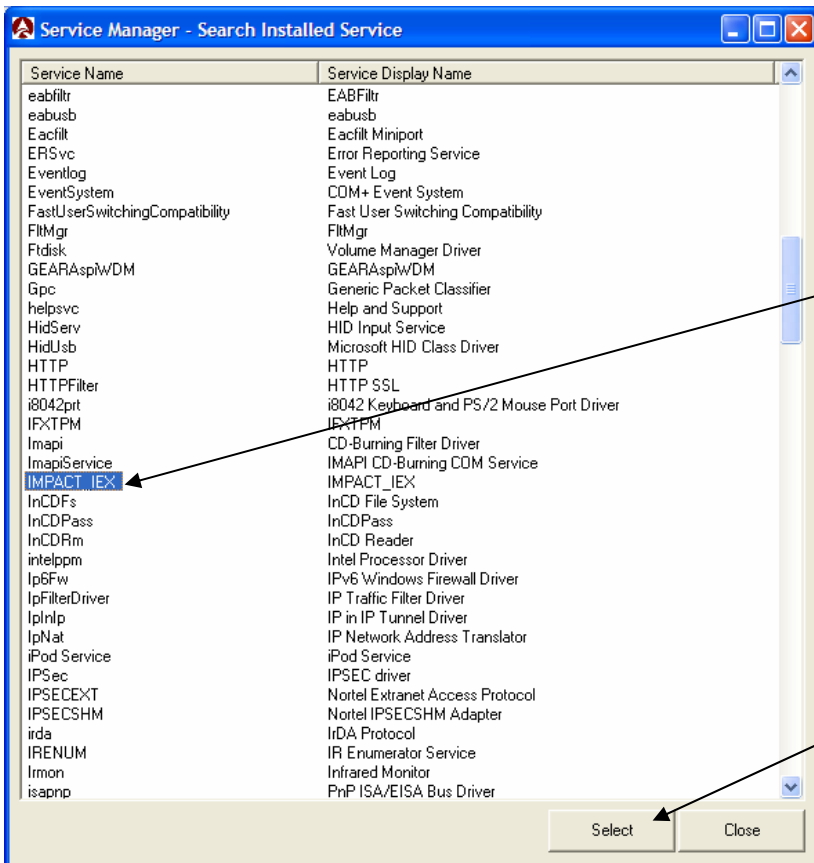
Go to the root folder of ImpactMD and double click "AIC\_ISM". Note that this is a different .exe file from what is found in prior versions of ImpactMD. You will now see the screen below. We will now add the IEX service to the Service Manager. Click the "Services" button.



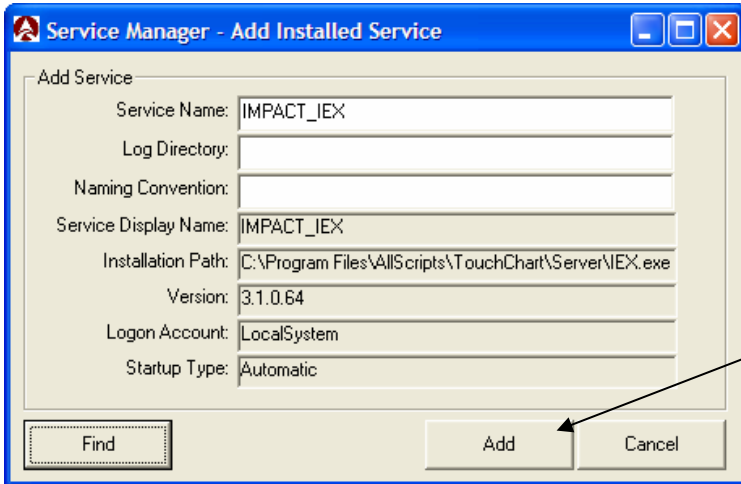
Click "Find".



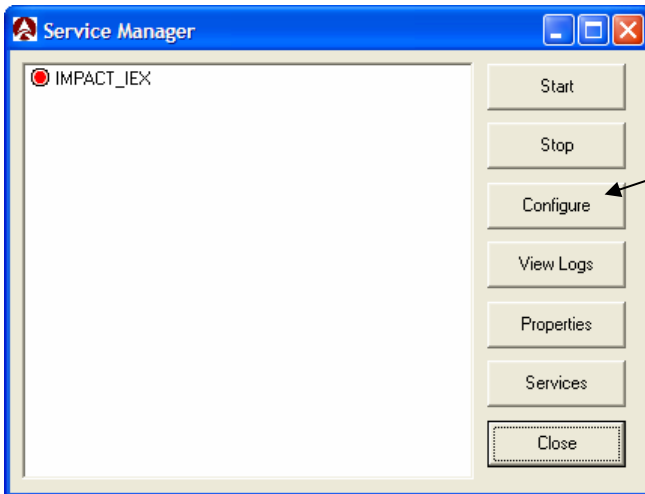
Find the Impact\_IEX from the list and click "Select".



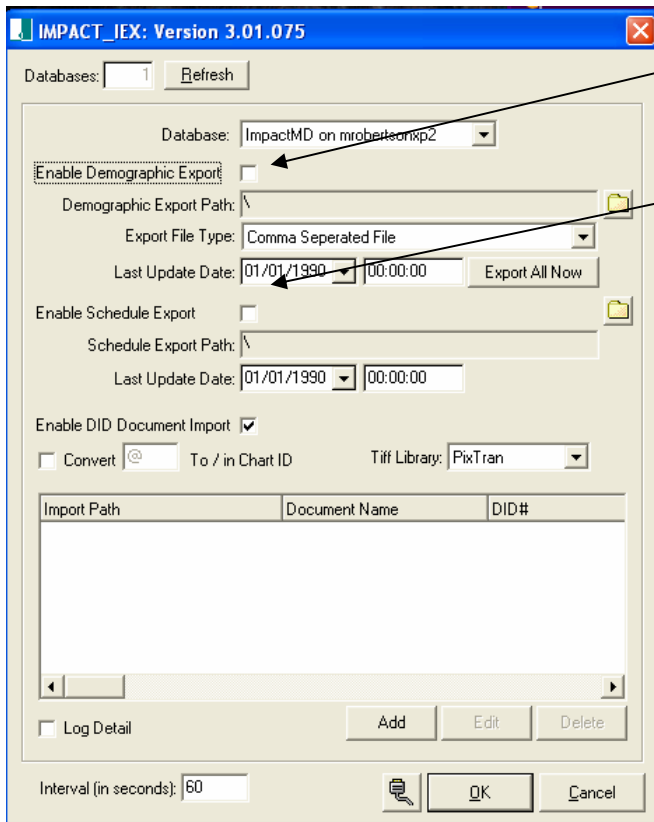
Click "Add" on the next screen.



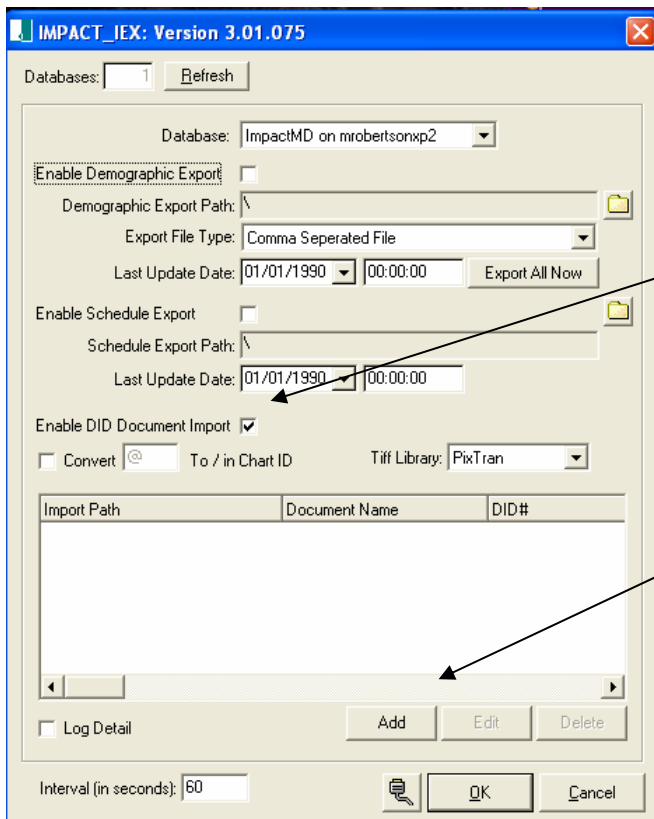
The IEX service now appears in the Service Manager (AIC\_ISM). Click “Configure” to setup the IEX.



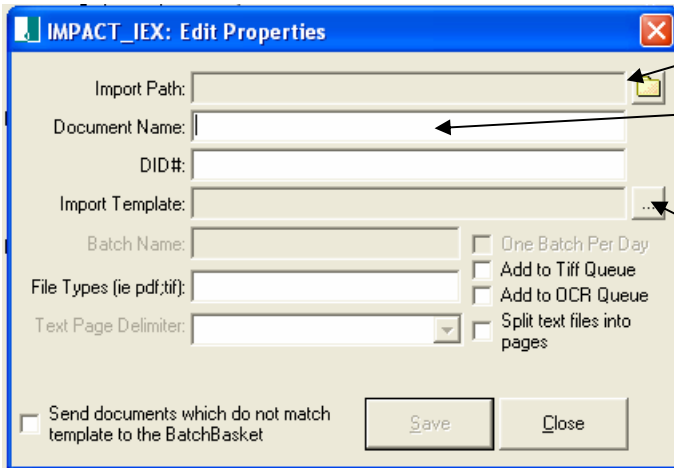
Make sure that “Enable Demographic Export” & “Enable Schedule Export” are unchecked.



Put a check mark in “Enable DID Document Import”. Putting a check mark here enables the document import function. Click “Add”.

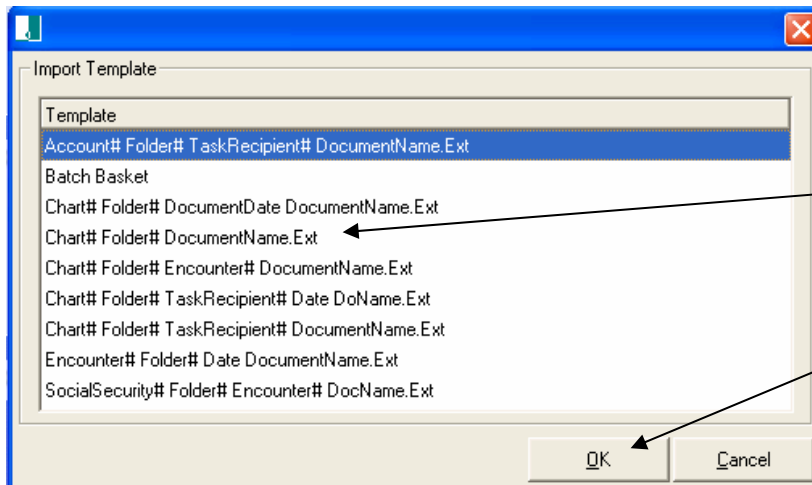


Select the "Import Path" for the documents to be imported. This should be a shared folder on the network. Normally this is a "UNC" path. Put in a "Document Name". This document name will be ignored if the Import Template you are using will specify a name for the document (but you are required to input a name here no matter).

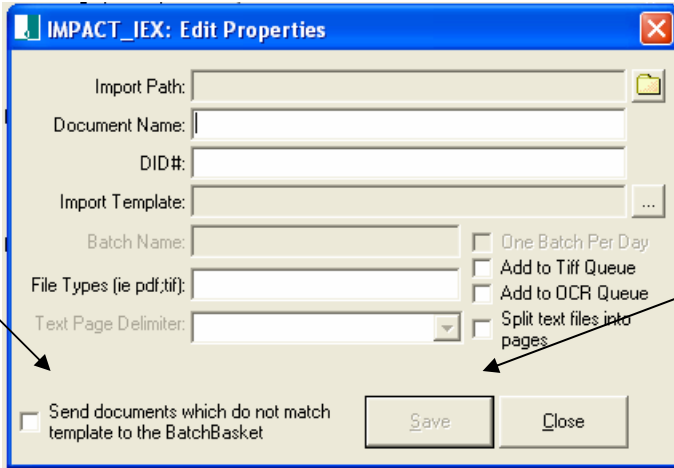


Now click the ellipses button on "Import Template".

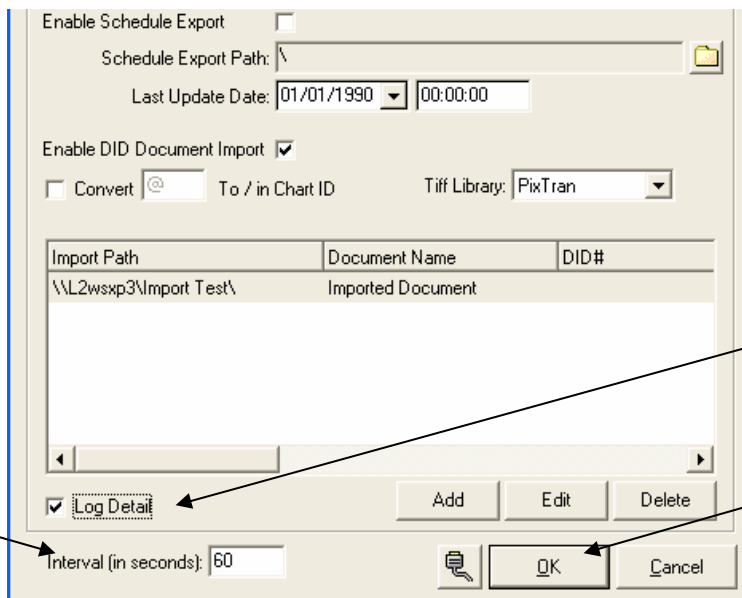
Select the Import Template you will use for this import routine. We will cover creating custom templates later in this document. Click "OK".



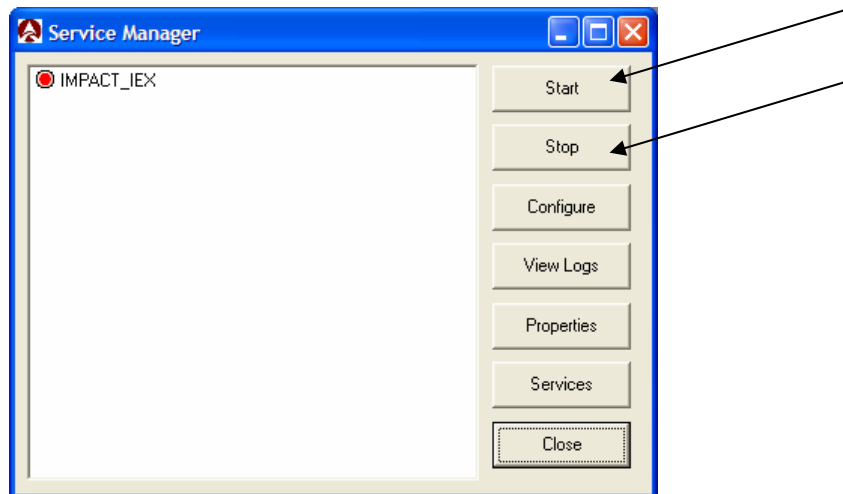
You will need to indicate the file type if you would like IEX to pull in only a certain file type from a folder, i.e. You have a wav file and a Word document coming in from your transcriptionists, if you indicate .doc as your file type, only those documents will be imported. You may select “Send documents which do not match template to the Batch Basket”. This option will send any document that is imported and does not match the specified template format to the Batch Basket. That document can then later be sorted to the correct chart. Click “Save”.



You will now see your new import routine setup in the window. You may add as many import routines as you wish. Each one would need to be pointed to a different folder on the network (import path). You have the option of selecting “Log Detail”. This will create a detailed import log for troubleshooting. The default Interval (in seconds) is set to ‘60’. This means that every 60 seconds, the IEX will look inside the specified folders to see if there is any information to import. The default 60 seconds is the highest number you go set...but you may change this number to a lower setting (30 – 60 seconds is the norm). Click “OK” when done.



Unlike in previous versions of ImpactMD, you may “Start” & “Stop” the IEX Service from this screen. Click “Close” when done. NOTE: As stated earlier in the instructions, the Windows Service will need to be set to run as an administrator account.



### **Creating a Custom Template**

Many times, you will need to create a custom template for importing documents with the IEX. The steps below will outline the procedure for creating a custom template.

The IEX will import documents based upon certain criteria held within the name of a document. Normal criteria used for importing includes: The chart (MRN) number, the folder number, date of document, name of document.

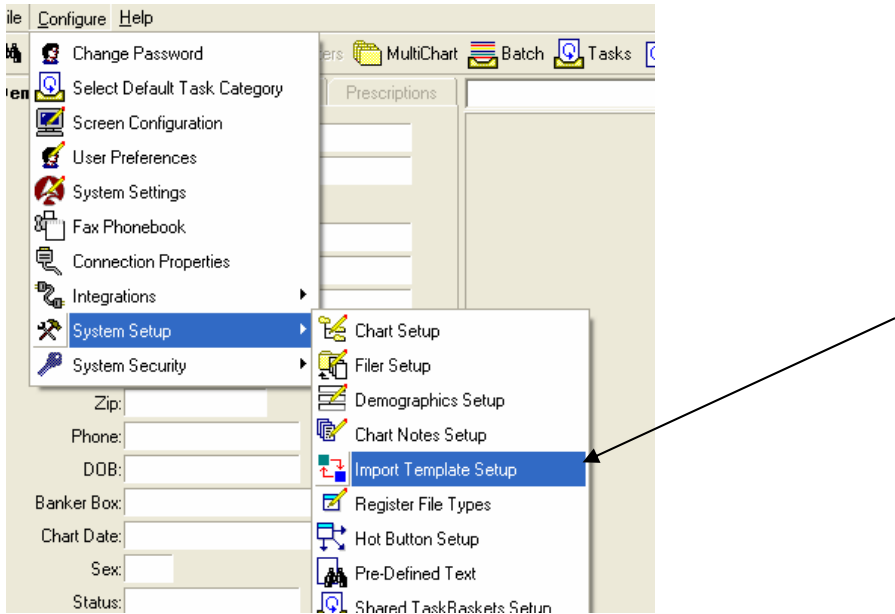
Chart # (MRN) – This is the number associated with the patient in the system

Folder # - This is a number that is associated with the actual folder in ImpactMD. By assigning the folder #, the IEX will import the document directly into the patient chart and into the correct folder in the chart structure.

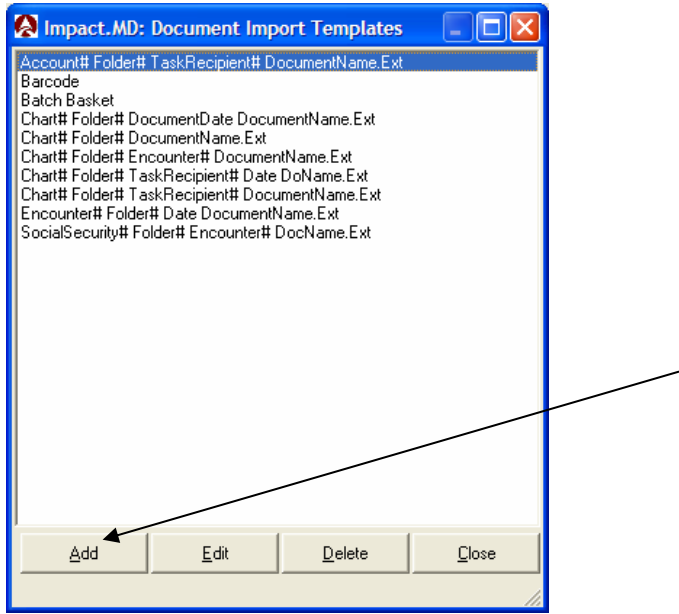
Document Date – You can associate a document date with the imported document.

Document Name – When creating a custom template, the document name is a required field. This name will be carried over into the chart for the particular document.

To create a custom template, open ImpactMD and click CONFIGURE>>SYSTEM SETUP>>IMPORT TEMPLATE SETUP.



Notice that there are already several templates pre-made in the system. You may opt to use one of these templates or create a custom template. For this exercise, we will create a custom template using the Chart #, Folder #, & Document name. Click “Add”.



Select a name for your template. Choose “Patient Chart” for the “Template Table”. Choose “Document File” for the “Template Type”. My template will be named “Import Test”.





Impact.MD: Edit Import Template

Template Name:

Template Table:

Template Type:

Template Properties

Data Item	Fixed Length	Format	Delimiter
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>

Format:

Now we must select the criteria used for importing. The first Data Type we will choose is "Chart #". Select this from the drop down list.

Impact.MD: Edit Import Template

Template Name:

Template Table:

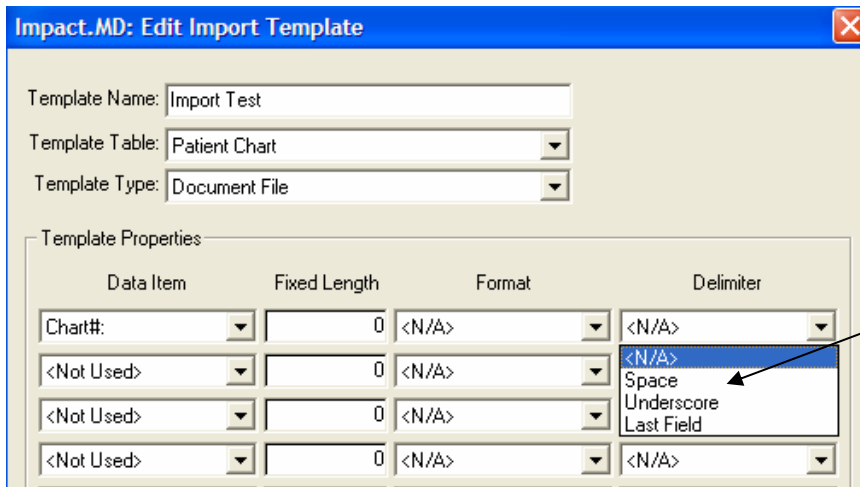
Template Type:

Template Properties

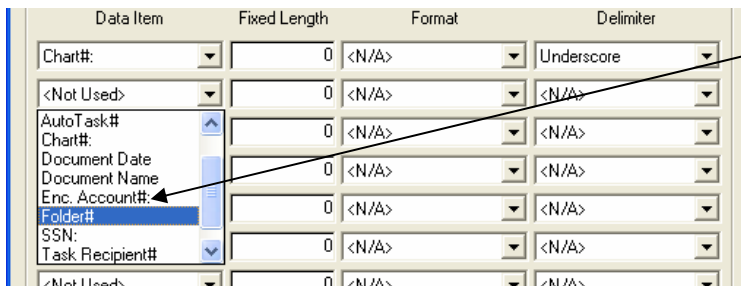
Data Item	Fixed Length	Format	Delimiter
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
Account#:	0	<N/A>	<N/A>
AutoTask#	0	<N/A>	<N/A>
Chart#:	0	<N/A>	<N/A>
Document Date	0	<N/A>	<N/A>
Document Name	0	<N/A>	<N/A>
Enc. Account#:	0	<N/A>	<N/A>
Folder#	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>
<Not Used>	0	<N/A>	<N/A>

Format:

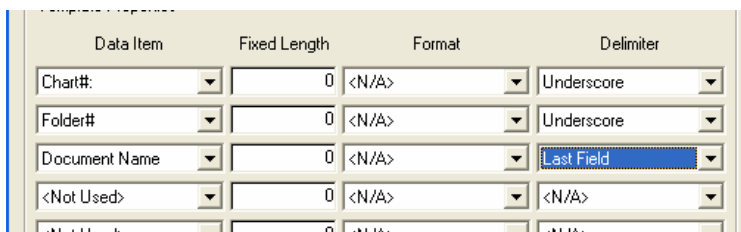
Now choose what delimiter we will use for our files. For this instance, we will choose "Underscore".



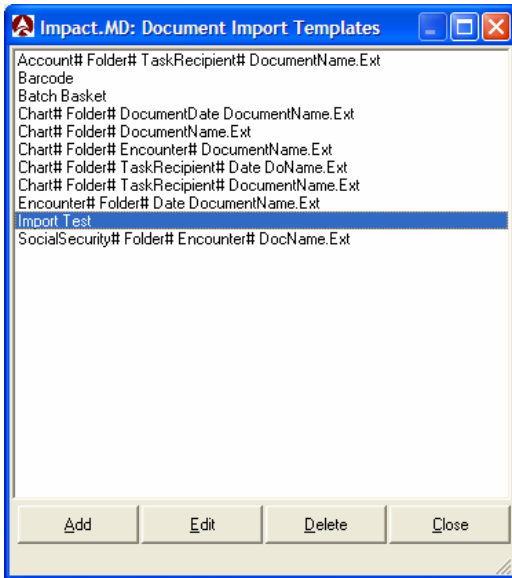
Next, we will choose “Folder #” for our next Data Type. (We will discuss how to find a particular Folder # later in this document). Choose Underscore as your Delimiter once again.



Choose “Document Name” as the last Data Item. Select “Last Field” for the Delimiter. We are choosing “Last Field” for the last item in our template. This tells the IEX to ignore any data beyond the “Document Name”. Click “Save”.



You can now see “Import Test” as one of the list items on the Document Import Template screen. This template is now ready for selection in the configuration screen of IEX.

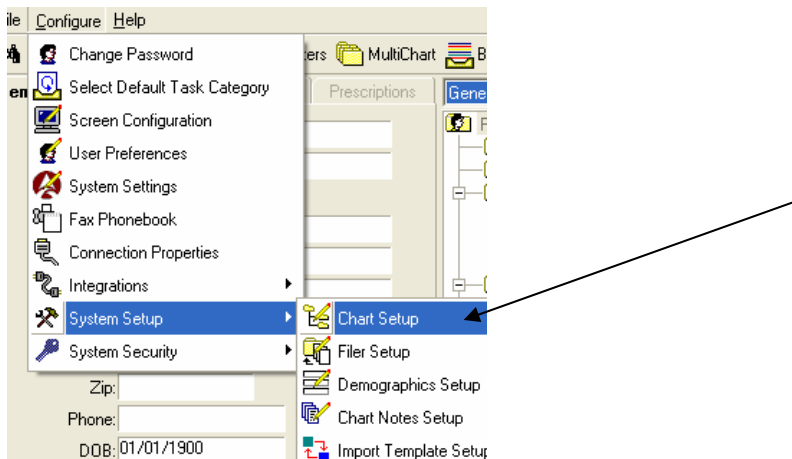


### **Naming a Document for Importing**

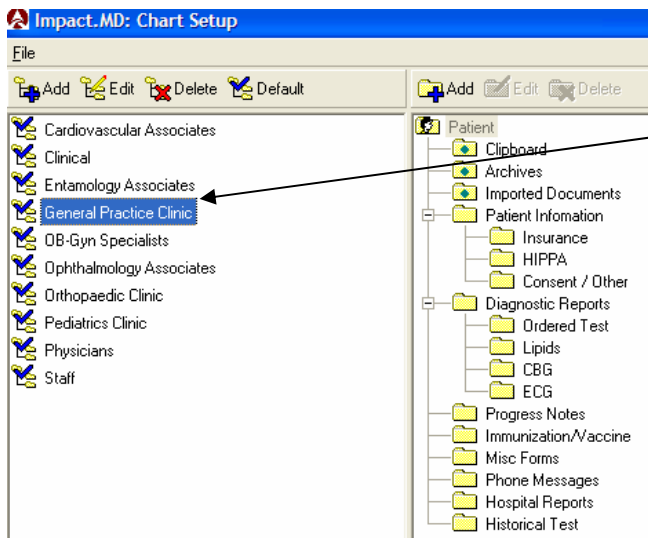
We will use the custom import template we just created for the example in this section. Since we used Chart #, Folder #, Document Name, and underscore as our delimiter, we will need to name our documents in this format.

The patient example we will use for this import will be “Test, Patient” who has a MRN of ‘000228853’. We want to import this document into the “Progress Notes” folder in ImpactMD. We also want to name this document “Historical Chart”.

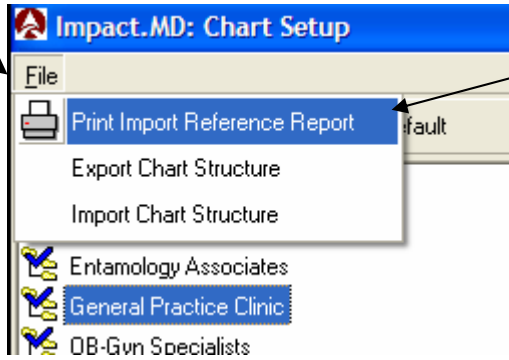
Since we already know the chart number and what the document will be named, the only piece of information we still need is the folder number. To find the list of all folder numbers, login to ImpactMD and click CONFIGURE>>SYSTEM SETUP>>CHART SETUP.



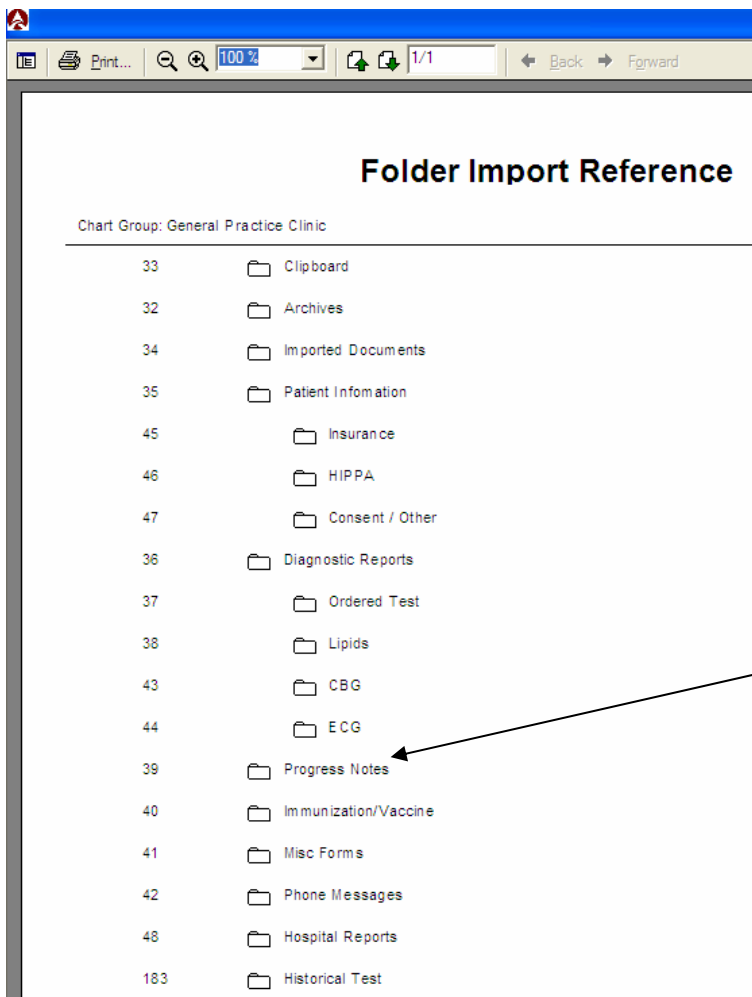
Select the correct chart structure if more than one.



Click "File", then "Print Import Reference Report".



You now have a list of all folder numbers for this chart. Note that Progress Notes is folder number 39.



Now we have all the information needed to correctly name our document for importing with the IEX.

Our template states that our format should look like the following:

“Chart#\_Folder#\_DocumentName”

Therefore, our document for “Test, Patient” would be named:

000228853\_39\_Historical Chart.tiff (this could also be .doc if Word document)

If you break this down, this is the information held in the document name:

000228853 – Chart number for the patient

39 – Folder number that this document should reside in

Historical Chart – The actual name of the document

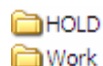
Once this document is dropped into the specified import folder on the network, the IEX service will:

Pick up the document  
Look at the template format  
Process the document using the template criteria (Chart#, Folder#, Document Name)  
Move the document to the correct patient chart

The import routine is now done and the document should be in the correct chart, correct folder, and named correctly.

## **Troubleshooting**

If a document was not imported into the chart after being put into the import folder, please browse to the import folder location. You will find two folders inside the import folder. One is labeled "HOLD"...the other "Work".



When a document is being processed by the IEX, it is moved to the "Work" folder. If everything is processed correctly, the document is moved into the chart.

If an error occurs while processing the document, the document is moved to the "HOLD" folder. The document will stay in this folder until it is manually removed. If there appears to be nothing wrong with the document, you may "cut and paste" the document back into the root of the import folder for it to be processed again. If the document is moved to the "HOLD" folder again, there is something either wrong with the document name or the document itself.

There are two log files that can be reviewed when documents are imported:

DOCUMENTIMPORT.LOG  
IEXDETAIL.LOG

These log files are held in the root of the ImpactMD folder and can be reviewed for error messages and tracking.

If you decide to change any configuration in the IEX, it is good practice to stop the IEX service before any changes are made. Restart the service once you are done making changes.

**If you need further assistance with setup or troubleshooting errors with the IEX, please call our Allscripts Support Help Desk at 888-426-7226, option 3.**