



AutoReceive

User Manual

Version 7.0



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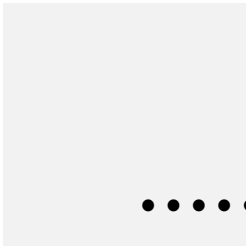


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About This Manual

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Introduction

This *AutoReceive User Manual* provides information on installing, configuring, and using Care360 AutoReceive. It also describes how to add, modify, and remove subscriptions that deliver results to your printer or computer from your service provider.

Note: To better understand what a subscription is, see [“Configuring Subscriptions”](#) on page 14.

Intended Audience

This user manual is intended for personnel who configure and maintain subscriptions enabling automatic transmittal of lab results from laboratory service providers to their care sites. The manual assumes your computer, printer, and network (if applicable) are set up and ready to use and that you are familiar with the basic skills needed to use them.

What's New in This Release

AutoReceive 7.0 provides the following updates and enhancements:

- **Radiology Result Print Ordering.** AutoReceive now prints radiology results according to the same configuration setting as lab results. All print results are ordered by file name or file date based on your settings.

For more information, see [“Configure Printable Test Results”](#) on page 21.

- **Simplified Advisory Report.** AutoReceive’s advisory report no longer displays empty headings; headings are now only displayed in the advisory report if the report contains corresponding advisory messages.

For more information, see [“Configure Printable Test Results”](#) on page 21.

- **Expanded Operating System Compatibility.** AutoReceive now supports the following operating systems:
 - Microsoft Windows® 7
 - Microsoft Windows Server® 2008
- **Expanded Service Mode Support.** AutoReceive can now be used in service mode under all operating systems.

Documentation Conventions

This manual uses the following conventions:

- Manual titles, special terms, Web page and dialog box titles, menu items, toolbar button names, labels that appear on Web pages and dialog boxes, and keyboard key names appear in *italic*.

Italic is also used to indicate variables. For example, an e-mail address might be presented as *name@company.com*. When typing the address, you would use the actual user name and company name rather than *name* and *company*.

- Words that are being emphasized appear in **bold**.
- Text that you type as well as messages and prompts that appear on the screen appear in `this type style`.
- The greater than symbol (>) indicates a series of menu items to click. For example, the instructions to click the *File* menu item and then click *Open* might be presented in the following way: “Click *File* > *Open*.”
- This manual calls your attention to important information in several ways:

Note: A note indicates exceptions to the stated rule, or information that emphasizes or supplements important points in the main text. A note can supply information that might apply only in a special case.

CAUTION! A caution indicates that failure to take or avoid a specified action could result in losing data. When you see a caution, follow the instructions carefully.

Abbreviations and Acronyms

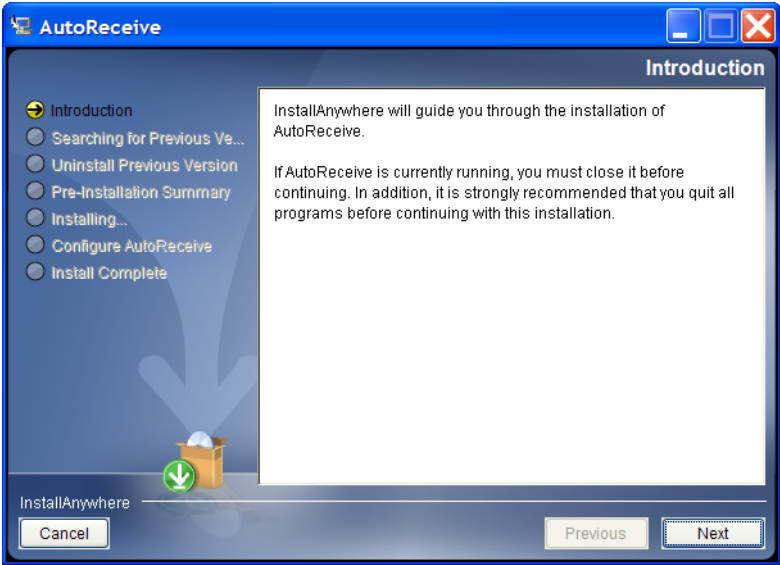
The following is a list of abbreviations and acronyms that are used in this manual.

Abbreviation/Acronym	Description
CD-ROM	Compact Disc Read-Only Memory
DPI	Dots Per Inch
EMR	Electronic Medical Record
HL7	Health Level 7 Standard Interface
GB	Gigabyte
HTTP	Hypertext Transfer Protocol
HTTPS	Hypertext Transfer Protocol, Secure
ISP	Internet Service Provider
JRE	Java™ Runtime Environment
KB	Kilobyte
LAN	Local Area Network
MB	Megabyte
MHz	Megahertz
PDF	Portable Document Format
POCT	Point-of-Care Testing
RAM	Random Access Memory
SOAP	Simple Object Access Protocol
TIQ	Test In Question
TNP	Test Not Performed

Chapter 1

Getting Started

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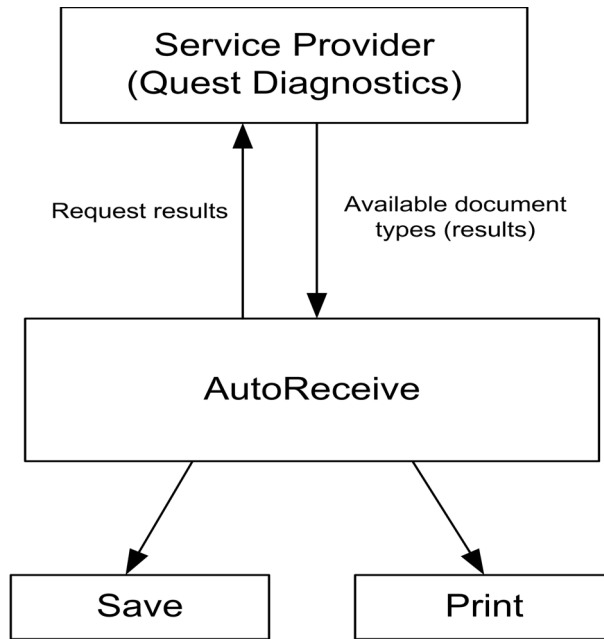
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About AutoReceive

AutoReceive, part of the Care360 suite of products, provides a secure method for receiving, routing, and storing lab result reports from service providers. Once AutoReceive is installed, you can create subscriptions to receive results in one or more of the available formats, such as HL7 or Printable (PDF) test results.

The following graphic illustrates the process of receiving documents from a service provider using AutoReceive.



About Subscriptions

A subscription is a defined delivery method that identifies the document types (HL7 and PDF) that you want to receive, how and when results are delivered to you, and how you prefer the results be stored, saved or printed for clinical use. You can create any number of HL7 and PDF subscriptions, each with differing delivery options, if you choose.

A subscription includes several parameters that you must configure:

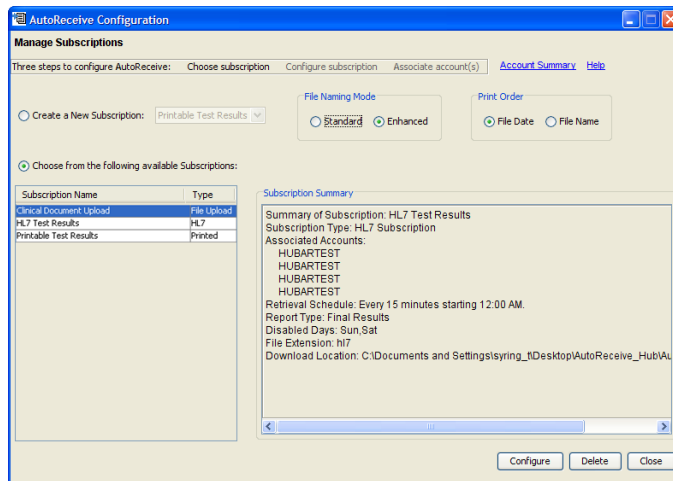
- Document type (for example, HL7 or PDF).
- Subscription name.
- Save or print location (defined at your discretion).
- Type of result (final results only or partial and final results).
- Frequency of transmission (for example, every 60 minutes).
- Disabled days of the week (for days your office is closed).
- Print order (for example, by file date or file name).
- HL7 filename extension (for HL7 subscriptions only).
- Provider Account (a combination of information identifying your care site and your Quest Diagnostics Account Number).

A provider account can be associated with only one HL7 subscription and one PDF subscription type. If you want reports from all your provider accounts to be delivered according to the same set of parameters, that is, at the same time(s) each day, to the same printer/folder, etc., you might choose to configure only two subscriptions—one for HL7 and one for PDF—and associate all your provider accounts with these two subscription types.

If, however, you want to specify variations to your subscriptions to accommodate differing delivery requirements among your clinicians, you can create and name additional HL7 and PDF subscriptions and associate them with accounts that are not already associated with another subscription of the same document type.

Following is an example of a subscription: if you want to receive HL7 final results (document and result type) from Quest Diagnostics for the Northern Medical Group (provider account), you can configure an HL7 subscription to retrieve results every 60 minutes (frequency of transmission) to a folder on your network (save location). You might have already configured other HL7 subscriptions with differing parameters for other provider accounts, but AutoReceive offers the flexibility to configure additional subscriptions to suit your clinical requirements. See “[Configuring Subscriptions](#)” on page 14 for more information on creating subscriptions.

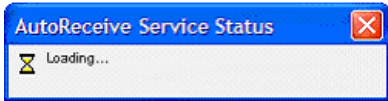
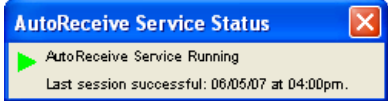

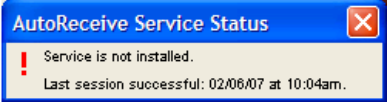
The following image shows two configured subscriptions and the specified delivery parameters for the selected account. For more information, see “[Accessing Subscription Summary Information](#)” on page 41.



About Running AutoReceive as a Windows Service

AutoReceive will run as a Windows service by default, unless a previous install of AutoReceive on the same machine ran as a standard application, in which case this setting will be retained. A Windows service is an application that runs when Windows is started, and continues to run in the background as long as Windows is running. Running as a Windows service enables AutoReceive to continue downloading or printing results even when no user is currently logged into Windows.

From the user perspective, there are no visible changes to the AutoReceive user interface when AutoReceive is running as a Windows service, except for some minor modifications to the status messages that appear in the status window (for more information on setting notification options, see “[Changing Notification Options](#)” on page 49). The service-related status messages that may appear include the following:

For This Status	This Status Window Appears
AutoReceive is loading	
AutoReceive is in Service Mode, and the service is connected	
AutoReceive is in Service Mode, and the service is stopped	
AutoReceive is in Service Mode, but the service mode is unavailable (this can be the result of various technical and security issues)	

You can still access the AutoReceive menu options from the notification area (at the far right of the Windows taskbar), and you can open the AutoReceive application from the *Start* menu. The primary difference is that exiting AutoReceive (by right-clicking the *AutoReceive* icon and selecting *Exit*) closes the user interface, but does **not** stop the Windows service from running.

Note: AutoReceive will only operate properly as a Windows Vista, Windows 7, or Windows Server 2008 service if you run it as an administrator.

Installing AutoReceive

AutoReceive installation is a two-part process. After installing AutoReceive, you must log in and configure your subscription(s) in order for AutoReceive to open upon restart and receive results. You will also be prompted to configure AutoReceive for your network immediately following installation. See [“Logging In to AutoReceive”](#) on page 11 for more information.

Notes:

- In order to install AutoReceive for Windows Vista, Windows 7, or Windows Server 2008, you must run the installer as an administrator on your computer. On any platform, you must have permission to install applications, and you must have sufficient permissions to run the AutoReceive executable file and the Java Runtime Environment (JRE) that is installed with AutoReceive. You must have permissions for the following directories:
 - If you are installing AutoReceive for a 32-bit version of Windows, AutoReceive installs to C:\Program Files\AutoReceive.
 - If you are installing AutoReceive for a 64-bit version of Windows, AutoReceive installs to C:\Program Files (x86)\AutoReceive.
- If you are installing AutoReceive on a computer running Windows Vista, AutoReceive will update twice unless you uninstall the previous version prior to upgrading. (For more information, see [“Uninstalling AutoReceive”](#) on page 34.) This repeated update is not dangerous to your data.

System Requirements

Review the hardware and software requirements outlined below before you install AutoReceive. For optimal performance, maintain the preferred hardware requirements.

Microsoft® Windows Vista, Windows 7, and Windows Server 2008

Item	Requirement
Processor	<i>Preferred:</i> 1 GHz or higher <i>Minimum:</i> 800 MHz or higher
Memory	<i>Preferred:</i> 1 GB RAM <i>Minimum:</i> 512 MB RAM
Hard Disk	<i>Preferred:</i> 2 GB with 400 MB of free space <i>Minimum:</i> 2 GB with 100 MB of free space
Monitor	800 x 600 through 1400 x 1050 resolution
Disk Drive	DVD-ROM or CD-ROM drive
Printer	Laser printer connected to a workstation or office network
Internet Connection	56 KB minimum modem speed for ISP connection

Microsoft Windows XP (All Service Packs)

Item	Requirement
Processor	<i>Preferred:</i> 300 MHz or higher Pentium®-compatible <i>Minimum:</i> 233 MHz or higher Pentium-compatible
Memory	<i>Preferred:</i> 256 MB RAM <i>Minimum:</i> 128 MB RAM
Hard Disk	<i>Preferred:</i> 2 GB with 400 MB of free space <i>Minimum:</i> 2 GB with 100 MB of free space
Monitor	800 x 600 through 1400 x 1050 resolution
Disk Drive	DVD-ROM or CD-ROM drive
Printer	Laser printer connected to a workstation or office network
Internet Connection	56 KB minimum modem speed for ISP connection

Microsoft Windows 2000

Item	Requirement
Processor	<i>Preferred:</i> 300 MHz or higher Pentium-compatible <i>Minimum:</i> 133 MHz or higher Pentium-compatible
Memory	<i>Preferred:</i> 256 MB RAM <i>Minimum:</i> 128 MB RAM
Hard Disk	<i>Preferred:</i> 2 GB with 400 MB of free space <i>Minimum:</i> 2 GB with 100 MB of free space
Monitor	800 x 600 through 1400 x 1050 resolution
Disk Drive	CD-ROM drive
Printer	Laser printer connected to a workstation or office network
Internet Connection	56 KB minimum modem speed for ISP connection

Microsoft Windows Server 2003

Item	Requirement
Processor	<i>Preferred:</i> 550 MHz or higher Pentium-compatible <i>Minimum:</i> 133 MHz or higher Pentium-compatible
Memory	<i>Preferred:</i> 256 MB RAM <i>Minimum:</i> 128 MB RAM

Item	Requirement
Hard Disk	<i>Preferred:</i> 2 GB with 400 MB of free space <i>Minimum:</i> 2 GB with 100 MB of free space
Monitor	800 x 600 through 1400 x 1050 resolution
Disk Drive	CD-ROM drive
Printer	Laser printer connected to a workstation or office network
Internet Connection	56 KB minimum modem speed for ISP connection

Notes:

- MedPlus will support the Windows XP (all service packs), Windows 2000, and Windows Server 2003 operating systems as long as they are supported by Microsoft Corporation.
- Use Adobe Reader version 5.0 or newer for viewing documentation PDF files, and files that you download using AutoReceive.
- The following requirements apply to the printer that you are using to receive and print documents:
 - Microsoft Windows-supported printer.
 - Network, serial, parallel, or USB connection.
 - Print drivers appropriate to your computer's operating system. PostScript® printer drivers are not supported.
 - Support for landscape and portrait orientation.
 - 200 dpi print resolution or higher.


For a list of compatible printers, see the *Readme* file that is available on the product CD and in the AutoReceive install directory.



Install AutoReceive

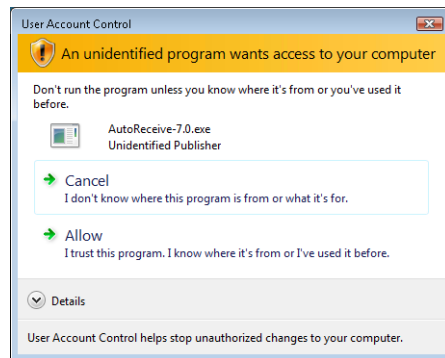
1. If you are updating an existing version, exit AutoReceive before you continue. (If you are installing AutoReceive for the first time, begin with step 2.)

To exit, do the following:

- a. Right-click the *AutoReceive* icon () in the notification area, and then click *Exit*.
 - b. When prompted, click *Yes* to confirm that you want to exit.
2. Insert the AutoReceive product installation medium (for example, flash drive or CD) into the appropriate drive, and then double-click *AutoReceive-7.0*.

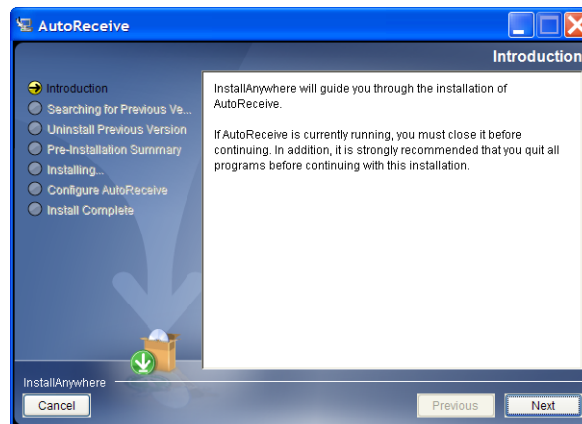
If you are using Windows Vista, Windows Server 2008, or Windows 7, proceed to step 3. Otherwise, proceed to step 4.

3. If you are using Windows Vista, Windows Server 2008, or Windows 7, a *User Account Control* window appears, prompting you as to whether or not the installation should continue. Confirm that you want the installation to continue.



The installer *Introduction* screen appears.

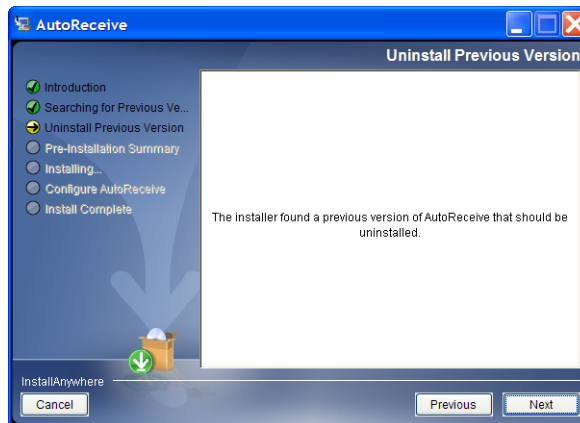
4. At the *Introduction* screen, click *Next*.



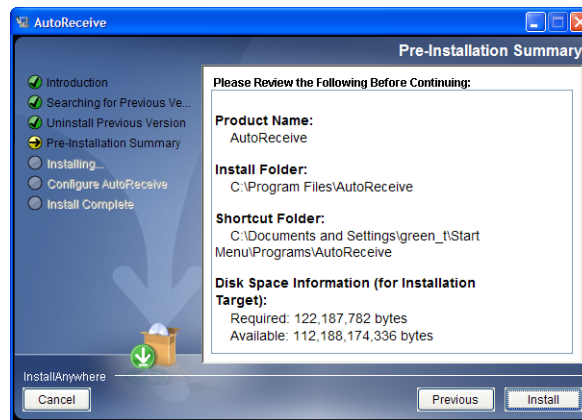
The *Please Wait* screen appears while the installer prepares to install AutoReceive.

Tip: If the *Please Wait* screen appears for an extended amount of time (without finding a previous AutoReceive installation), click *Previous* and then click *Next* to continue the installation (bypassing the *Please Wait* screen).

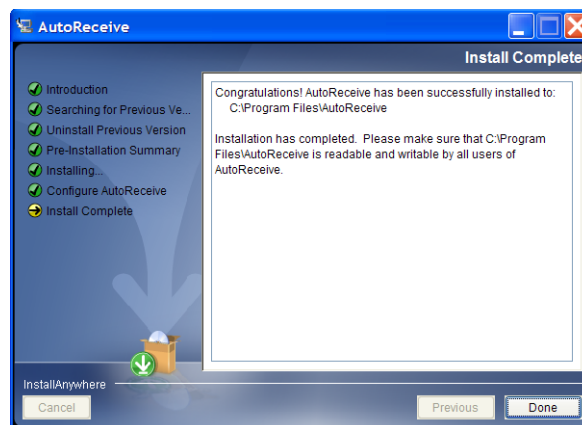
5. If a previous version is detected on your computer, do the following:
 - a. Exit AutoReceive (as described in step 1), and when the *Uninstall Previous Version* screen appears, click *Next*.



- b. After the previous version has been uninstalled, click *Next* to continue the installation.
6. Review the *Pre-Installation Summary* screen for accuracy.



7. If the *Pre-Installation Summary* screen information is correct, click *Install*.
AutoReceive is installed on your computer. Installation may take a few moments. When AutoReceive is installed on your computer, the *Install Complete* screen appears.



8. Click *Done*.

The AutoReceive Splash Screen appears.



The Splash Screen provides a visual indicator notifying you of AutoReceive activity (for example, loading and caching document types and provider information from the Hub).


AutoReceive starts automatically, and the *Network Configuration* dialog box appears.

9. If you are installing AutoReceive for Windows Vista, Windows 7, or Windows Server 2008, and the user who will access AutoReceive does not conform to a built-in user role, you must perform the following additional steps:
 - a. Navigate to `C:\Program Files\AutoReceive`.
 - b. Right click the `config` folder and select *Properties > Security*.
 - c. At *Group or User Names*, select the user or user group who will use AutoReceive.
 - d. In the *Permissions for...* area, at *Modify*, select the *Allow* check box.
 - e. Click *OK*.
 - f. Repeat steps **b** through **e** for the following folders:
 - a. `logs`
 - b. `print_q`
 - c. `staging`
 - d. `status`
 - e. `temp`

CAUTION! Failure to complete this step will prevent AutoReceive from properly assigning and saving some settings.

10. Continue with “[Logging In to AutoReceive](#)” on page 11.

Logging In to AutoReceive

The first time AutoReceive starts, you need to identify your computer's Internet connection—modem or local area network (LAN)—and enter a valid *Username* and *Password* to initiate the service. After you log in and configure your subscription(s), AutoReceive remains active as long as your computer is on. While active, an *AutoReceive* icon () appears in the notification area, which you can use to access a number of menu options.

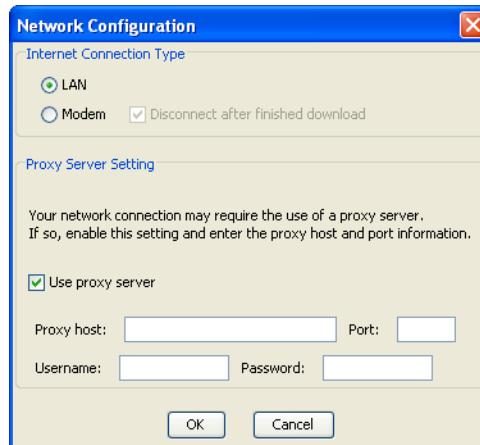
You will remain logged into AutoReceive until you manually stop the AutoReceive service (if running in Service Mode), exit AutoReceive (if running in Classic Mode), or shut down the computer. For information about exiting, see “Starting and Exiting AutoReceive” on page 61.

Notes:

- You must run AutoReceive as an administrator under Windows Vista, Windows 7, or Windows Server 2008. Failure to do so may cause AutoReceive to run incorrectly.
- If you need to change your *Username* and/or *Password*, see “Changing Configuration Settings” on page 47.
- If you need to manually start or exit AutoReceive, see “Starting and Exiting AutoReceive” on page 61.
- You can change your connection type later, if necessary, using the *Network Configuration* option on the right-click menu available from the *AutoReceive* icon in the notification area. See “Changing Connection Settings” on page 48 for more information.
- You are allowed three attempts to successfully log in. After three failed login attempts, AutoReceive automatically exits. The next time AutoReceive opens, the last known successful login information is used. To clarify your login information, contact your System Administrator.

Log In to AutoReceive

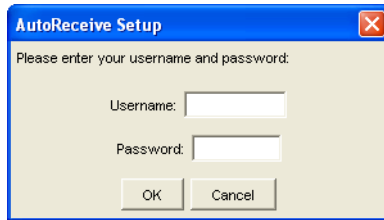
1. At *Network Configuration*, which displays immediately after installation, identify your computer's Internet connection by selecting one of the following:



- Select *LAN* if your computer accesses the Internet using a local area network (LAN).
Some LAN connections use a proxy server for HTTP and HTTPS connectivity. If your computer uses a proxy server, select the *Use proxy server* check box, and then type the *Proxy host* and *Port* information. If your proxy server requires you to log in, also type your *Username* and *Password* (provided by your System Administrator; this is **not** your AutoReceive *Username* and *Password*).

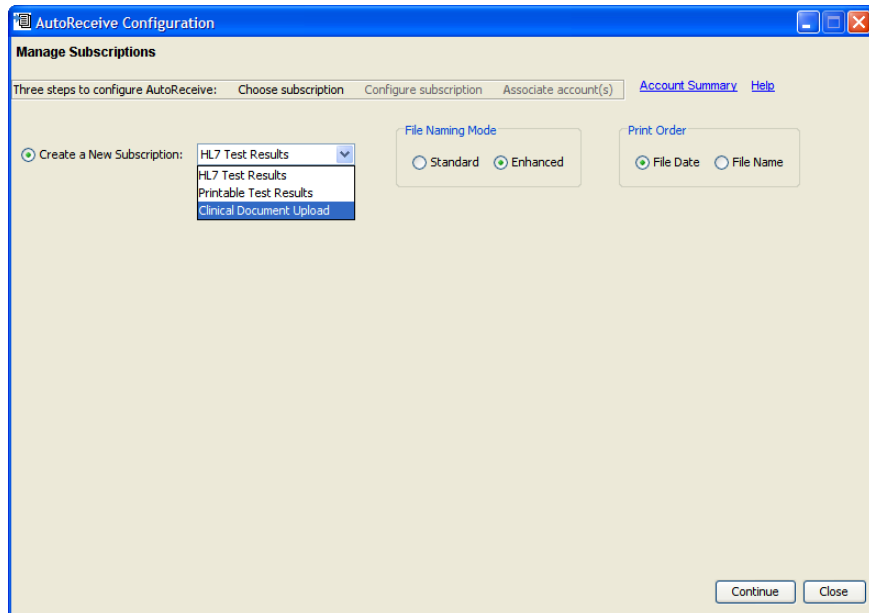
To determine if your LAN connection uses a proxy server, check your Internet browser's settings by selecting *Tools > Internet Options* on the browser menu bar. Click the *Connections* tab. Click *LAN Settings*. See if the *Use a proxy server for your LAN* check box is selected.

- Select *Modem* if your computer accesses the Internet using a modem. To automatically disconnect your modem after each transmission of results, select *Disconnect after finished download*.
2. Click *OK*.
 3. At *AutoReceive Setup*, type your AutoReceive username and password, and then click *OK*.

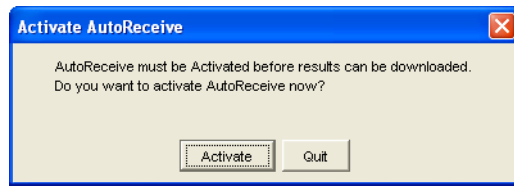


4. Begin configuring your first subscription.

For information about configuring HL7 or Printable subscriptions, see “Configuring HL7 Test Results” on page 16, “Configuring Printable Test Results” on page 21, or “Configuring Clinical Document Uploading” on page 27 respectively.



5. After you have configured one or more subscriptions, click *Close*.
6. When prompted, click *Activate* to activate your AutoReceive account.



Activating your account indicates that you have configured at least one AutoReceive subscription, and you are ready to begin receiving results.

Configuring Subscriptions

Configuring a new subscription is a three-step process. All three steps must be completed for the subscription to be considered active so that you can begin receiving results. An overview of the three steps follows:

- Choose Subscription.** Select the subscription type (HL7, Printable, or Clinical Document Upload).
- Configure Subscription.** Specify the subscription's parameters, including the retrieval schedule and the location to save or print the results.
- Associate Account(s).** Associate the subscription with one or more provider account(s).

At any time during the configuration process, you can monitor your progress by reviewing the top of the configuration window to see the *Three Steps to Configure AutoReceive*. A check mark displays next to each completed step.



CAUTION! If you close the *Subscription Configuration* dialog box prior to completing the configuration, your configuration changes are not saved. The three configuration steps listed above have associated parameters from which you must make selections. See the descriptions below for the selections available for each of the three configuration steps.

Step 1: Choose Subscription

The first step in creating a new subscription is to select the subscription type, either HL7, Printable (PDF) test results, or Clinical Document Upload. Based upon this selection, the appropriate parameters display for the second step of the configuration process.

Step 2: Configure Subscription

You can uniquely configure each subscription to meet the needs of your office. You need to consider and make selections for the following parameters for each subscription you configure:

- **Subscription name.** The default name is *HL7 Test Results* for an HL7 subscription, *Printable Test Results* for a PDF subscription, or *Clinical Document Upload* for a Clinical Document Upload subscription. You can change the name to something more meaningful to you if you want. For example, if you have multiple service providers from whom you are receiving results, you may want to identify the subscription by the service provider's name. An example might be *Quest Diagnostics HL7 Test Results*.
- **File Naming Mode.** There are two naming modes that you can select from, to indicate how HL7 and PDF files are named: *Standard* and *Enhanced*. The *Standard* naming mode uses a timestamp only to name the file, while the *Enhanced* mode adds a Provider ID, Message Control ID (MCID), and Document ID (PDF files only) to the file name to aid in matching an HL7 file to any corresponding PDF file(s).

Note: The *File Naming Mode* you select applies to **all** subscriptions you configure; that is, you only need to set it once. You do **not** need to select it separately for each subscription.

Examples of the Enhanced file formats are shown below:

- **HL7:** *Provider ID-MCID-timestamp.hl7*

- **PDF:** *Provider ID-MCID-Document ID-timestamp.pdf*

Enhanced file naming examples:

- **HL7:** 10088-10200001-1179842547381.h17
- **PDF:** 10088-10200001-87235-1179842547782.pdf

- **Print Order.** If you selected *Enhanced* file naming mode, you can choose the print order in which your results will be sorted. You can choose to sort results by *File Date*, or *File Name*.
- **Retrieval schedule.** The retrieval schedule is defined by your selections for both a *retrieval time* and a *result type*. Choose a retrieval time by selecting either a *specific time* or an *interval*. Examples include:
 - **Specific time.** You may want to receive results first thing in the morning and at the end of the day. To do this, you can select 8:00 A.M. and 6:00 P.M. as the *specific times* for receiving your results.

Note: When you select a specific time or interval, AutoReceive retrieves results within a range of nine minutes *prior* to nine minutes *after* the selected time.

- **Interval.** You may want to receive results every four hours. To do this, you can set an *interval* by selecting a duration, for example, every four hours, and a starting time, for example 8:00 A.M. The starting time is used to calculate each interval in a 24-hour period. For this example, results will save at 8:00 a.m, 12:00 P.M., 4:00 P.M., 8:00 P.M., 12:00 A.M., and 4:00 A.M.

Additionally, you can determine the result type by selecting either *Final Results Only* or *Partial and Final Results* for the specified retrieval time.

- **Final results only.** If you make this selection, you will receive results only when **all** the results are complete for a specific requisition. If you choose this option, you may want to place orders that require more than one day to complete on a separate requisition. This way, you do not delay the receipt of the patient's labs that have quicker turnaround time.
- **Partial and final results.** If you make this selection, you will receive the *latest* result at the time of retrieval, whether it is a partial or final result.
- **Disabled day(s) of the week.** You may want to disable result retrieval on days that your office is closed. To do this, select the day, or days of the week to disable the results retrieval. You cannot disable results retrieval for **all** the days of the week. To disable retrieval for more than 6 days, for example, if your office will be closed for a week, exit AutoReceive until you want to resume results retrieval again. See [“Starting and Exiting AutoReceive”](#) on page 61.
- **Save location.** Determine where you want to save and/or print your HL7 and PDF results. Due to the format of HL7 files, they cannot be printed; they can only be saved to a folder on your computer or network.

HL7 subscriptions have additional configuration options available such as filename extensions and sorting of saved results. For more information on the HL7 configuration options, see [“Configuring HL7 Test Results”](#) on page 16.

Notes:

- The starting time (for intervals) does not designate the first time the results will be saved. You will receive results at the next *scheduled* interval after you complete the configuration. For example, if the intervals are 8:00 A.M., 12:00 P.M., 4:00 P.M., 8:00 P.M., 12:00 A.M., and 4:00 A.M. (every four hours) and you are setting the configuration at 9:00 A.M., you will receive results for the first time at 12:00 P.M.
- If you shut your computer down (without exiting AutoReceive) in the evening and then restart it in the morning, new results will save at the next scheduled interval.

Step 3: Associate Account(s)

The final step of the configuration process is to associate a provider account, or accounts, to the new subscription. You can choose from the list of available accounts that displays on the *Associate Accounts* dialog box. If you want, you can select multiple accounts for an individual subscription, but each account can be associated with only one HL7 subscription and one PDF subscription.

Note: This step is not required for a Clinical Document Upload subscription.

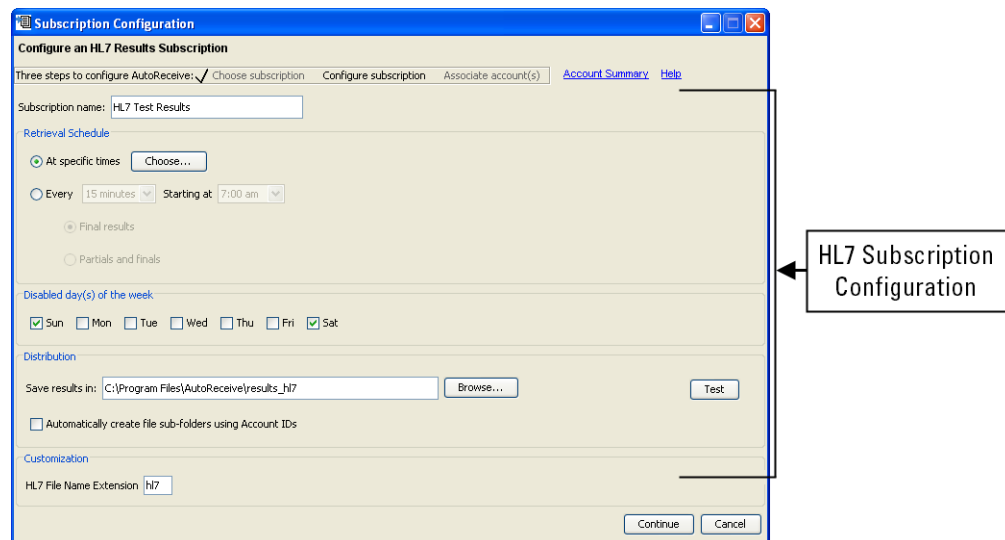
Once a subscription is saved, you can access it later to make any necessary modifications. See “[Managing Subscriptions](#)” on page 41 for more information on modifying existing subscriptions. To create a new HL7 subscription, see [Configuring HL7 Test Results](#) below. To create a new Printable subscription, see “[Configuring Printable Test Results](#)” on page 21.

Configuring HL7 Test Results

HL7 test result files are saved to a specified location on your computer or network where they can then be retrieved by your Electronic Medical Record (EMR) system or any other system that reads HL7 test results. Due to their format, HL7 files cannot be printed.

To review the detailed descriptions of subscription parameters, see “[Configuring Subscriptions](#)” on page 14. Two parameters that are specific to HL7 subscriptions are:

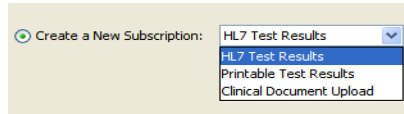
- **HL7 file extensions.** The default value for the HL7 file name extension is *hl7*. If your EMR system does not recognize files with an *.hl7* extension, type the HL7 filename extension that is appropriate for your receiving system (for example, *.res* or *.hll*).
- **Result sorting.** HL7 results can be sorted into sub-folders for each account that is associated to the subscription. If you want to sort your HL7 results in this manner, select the *Automatically create file sub-folders using Account IDs* option available in the Distribution area of the *AutoReceive Configuration* dialog box. See “[Configuring HL7 Test Results](#),” step 8 for more information.



Configure HL7 Test Results

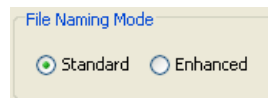
1. After a successful login, the *AutoReceive Configuration* dialog box automatically appears, allowing you to create a new subscription.

At *Subscription type*, click and select *HL7 Test Results*.



Note: If you would rather configure the Printable subscription first, see “[Configuring Printable Test Results](#)” on page 21.

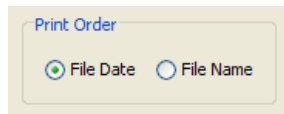
2. At *File Naming Mode*, select either *Standard* or *Enhanced* to indicate how result files are named. (For more information on the naming modes, see “[File Naming Mode](#)” under “[Step 2: Configure Subscription](#)” on page 14.)



Note: The *File Naming Mode* you select applies to **all** subscriptions you configure (including HL7 and Printable). If you have selected the mode previously, you do not need to select it again.

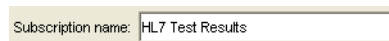
If you change the *File Naming Mode*, the setting takes effect immediately (that is, the next time results are downloaded).

3. At *Print Order*, select either *File Date* or *File Name* to indicate how results are sorted or printed.



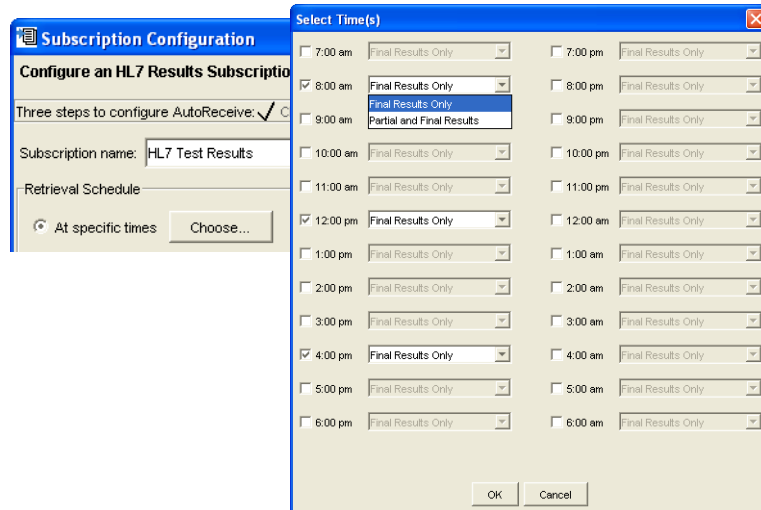
Note: In order to use this feature you must first select *Enhanced* as your *File Naming Mode*.

4. Click *Continue*.
5. At *Subscription Name*, type a subscription name for the HL7 results, if you do not want to use the default name *HL7 Test Results*.

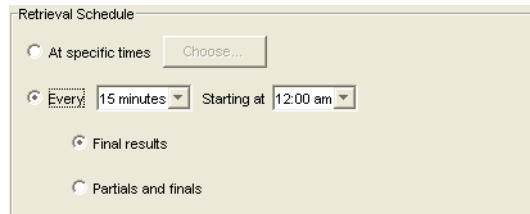


6. Set the retrieval schedule by selecting one of the following:

- To receive results at specific times, click *At specific times*, and then click *Choose*. At *Select Time(s)*, select the check box next to each desired retrieval time. For each selected time, specify whether you want to receive *Final Results only* or *Partial and Final Results*.

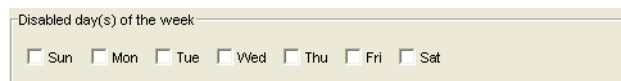


- To receive only final result reports, select *Final Results only*. All tests on the requisition must be complete to receive results.
- To receive the *latest* result, whether it is partial or final, select *Partial and Final Results*.
- When you are finished selecting the results type for each specific time, click *OK*.
- To receive results at regular intervals, click *Every*, and then click and select the interval duration and starting time.

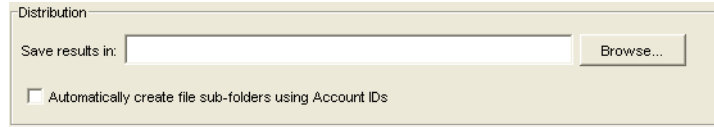


- To receive only final result reports, select *Final results*. All tests on the requisition must be complete to receive results.
- To receive the *latest* result, whether it is partial or final, select *Partials and finals*.

7. To disable retrieval for specific days of the week, click the appropriate day(s).



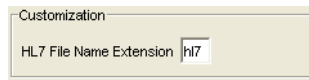
8. At *Save results in*, do one of the following to specify the location to save the HL7 results:



- Type the directory or network path in the space provided. For example, type `C:\AutoReceive HL7 Results`.
- To locate the directory or network path where you want to save the HL7 results, click *Browse*.

To sort the HL7 results into sub-folders by the account associated with this subscription, select the *Automatically create file sub-folders using Account IDs* check box.

9. At *HL7 File Name Extension*, type the appropriate file name extension used by your EMR system (if it is different from `hl7`).

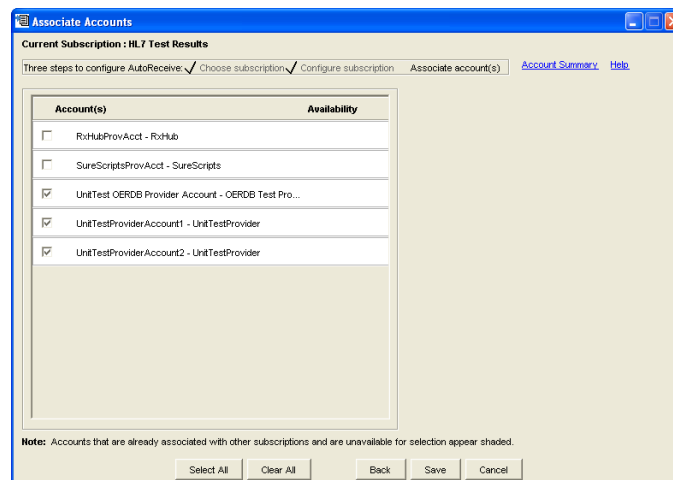


10. To test the configuration settings that you have made, click *Test*. A sample document (`test.hl7`) is downloaded and stored in the specified directory.

Note: If AutoReceive is running as a Windows service and you specified a network drive in step 8, the *Test* button may not accurately confirm the ability to save a results file; the account under which the service runs may not have the same access permissions as the current user. If you encounter problems saving files to a network drive, try saving to a local drive, or switch AutoReceive to Classic Mode instead of Service Mode. (For more information, see “[Switching Between Service Mode and Classic Mode](#)” on page 64.)

11. When you have finished configuring the HL7 subscription and have successfully tested it, click *Continue*.
12. At *Associate Accounts*, do one of the following to select the provider account(s) with which the subscription will be associated:
 - Individually click the checkbox(es) to select the service provider(s).
 - Click *Select All* to select all service providers.

If you want to clear the service providers, click *Clear All*, and then make your selections again.

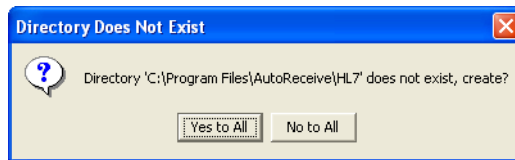


13. Do one of the following:
 - To return to the previous configuration screen to make changes prior to saving, click *Back*.
 - To save your selections and return to the first configuration screen, click *Save*.
If you are prompted to create a directory in which to save the results, click *Yes to all*. When you are finished configuring subscriptions, click *Close* from the configuration screen.
 - To exit the subscription configuration (without saving your changes) and return to the first configuration screen, click *Cancel*.

Tips:

- Accounts that appear shaded and display the status of *Pre-Assigned* are not available for selection; they are already associated with another subscription.
- If your accounts do not appear for selection on the *Associate Accounts* dialog box, contact Customer Support.

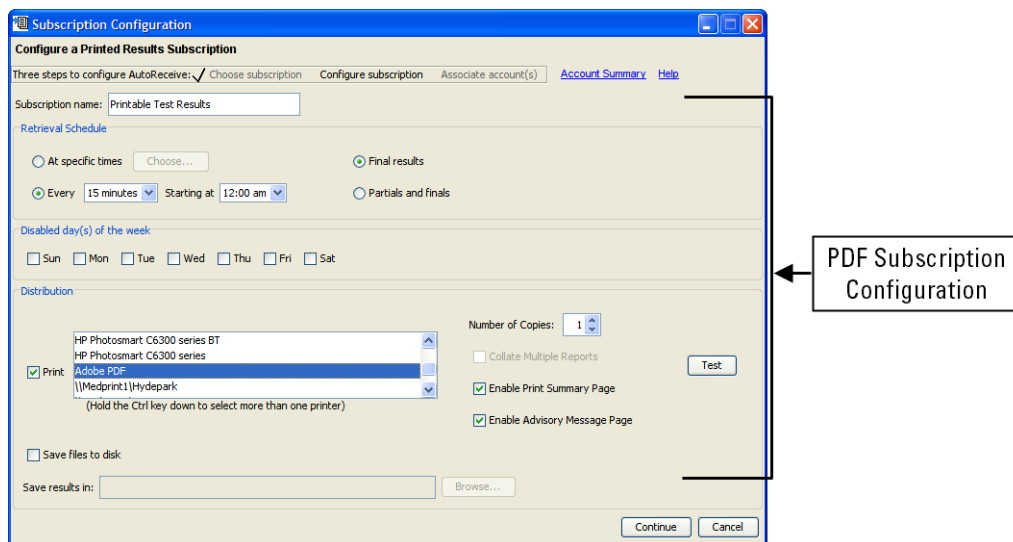
14. If you specified a directory (in step 8) that does not yet exist on your computer, you are prompted to create the new directory. To create the new directory, click *Yes to All*.



When you have completed the subscription, the *Manage Subscriptions* dialog box appears, displaying a summary of the subscription you created.

Configuring Printable Test Results

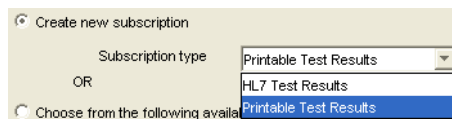
Printable (PDF) results can be saved to your computer or network drive, and can be printed automatically on a local or network printer. To review the detailed descriptions of subscription parameters, see “[Configuring Subscriptions](#)” on page 14.



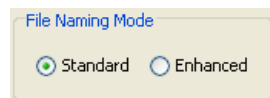
Configure Printable Test Results

1. After your first successful login, the *AutoReceive Configuration* dialog box automatically appears, allowing you to create a new subscription.

At *Subscription type*, click and select *Printable Test Results*.



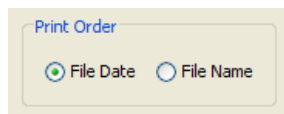
2. At *File Naming Mode*, select either *Standard* or *Enhanced* to indicate how result files are named. (For more information on the naming modes, see “[File Naming Mode](#)” under “[Step 2: Configure Subscription](#)” on page 14.)



Note: The *File Naming Mode* you select applies to **all** subscriptions you configure (including HL7 and Printable). If you have selected the mode previously, you do not need to select it again.

If you change the *File Naming Mode*, the setting takes effect immediately (that is, the next time results are downloaded).

3. At *Print Order*, select either *File Date* or *File Name* to indicate how results are sorted.

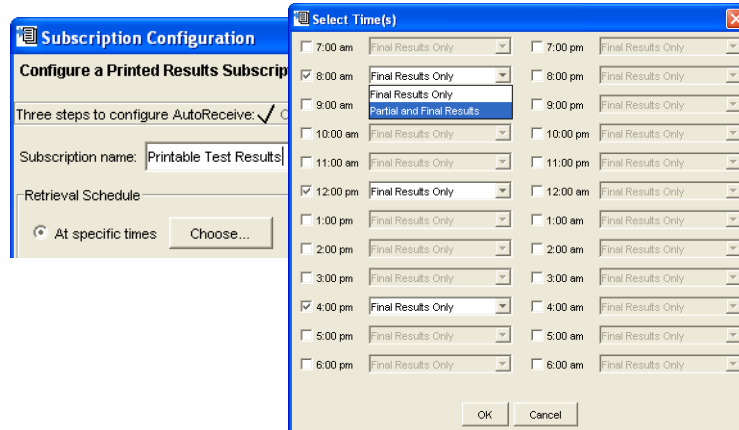


Note: In order to use this feature you must first select *Enhanced* as your *File Naming Mode*.

4. Click *Continue*.
5. At *Subscription Name*, type a subscription name for the PDF results, if you do not want to use the default name *Printable Test Results*.

Subscription name:

6. Set the retrieval schedule by selecting one of the following:
 - To receive results at specific times, click *At specific times*, and then click *Choose*. At *Select Time(s)*, select the check box next to each desired retrieval time. For each selected time, specify whether you want to receive *Final Results only* or *Partial and Final Results*.



- To receive only final result reports, select *Final Results only*. All tests on the requisition must be complete to receive results.
- To receive the *latest* result, whether it is partial or final, select *Partial and Final Results*.
- When you are finished selecting the results type for each specific time, click *OK*.
- To receive results at regular intervals, click *Every*, and then click and select the interval duration and starting time.

Retrieval schedule:

At specific times

Every Starting at

Final results

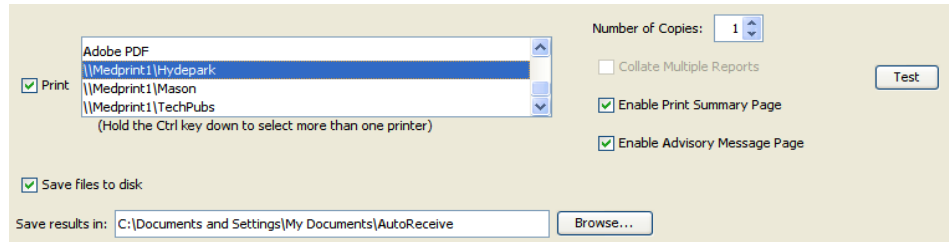
Partials and finals

- To receive only final result reports, select *Final results*. All tests on the requisition must be complete to receive results.
 - To receive the *latest* result, whether it is partial or final, select *Partials and finals*.
7. To disable retrieval for specific days of the week, select the appropriate day(s).

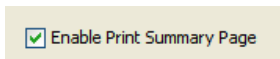
Disabled day(s) of the week:

Sun Mon Tue Wed Thu Fri Sat

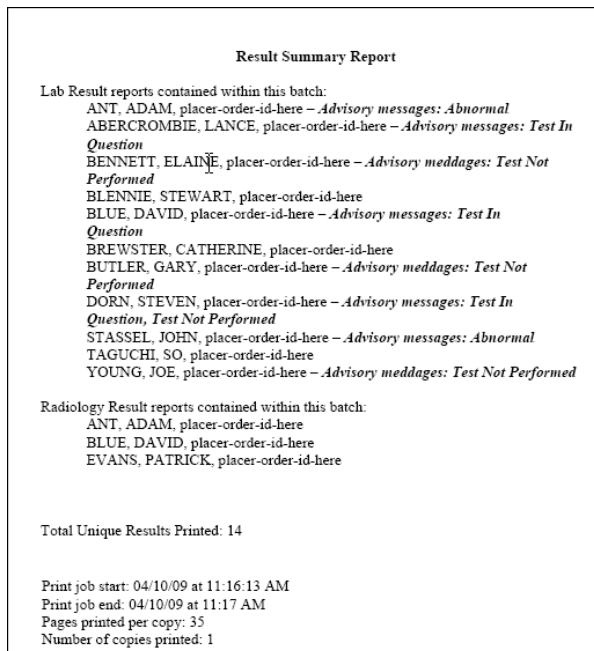
8. To configure one or more subscriptions to print and/or save the downloaded result documents, do one or more of the following:
 - If applicable, specify the *Number of copies* you want to print for each test result (maximum of 10 copies).
 - If you selected two or more copies for each test result, you can have your results collated by selecting the *Collate Multiple Reports* check box. If you are printing more than one test result, selecting *Collate Multiple Reports* will collate those results.



9. To automatically print test results, select the *Print* checkbox, and then click and select a local or network printer. To select more than one printer, hold down the Ctrl key while you select the printers.
 - To generate a summary of your printed test results, select the *Enable Print Summary Page* checkbox.



- An example of the *Result Summary Report* is shown below.



- The *Result Summary Report* displays a summary of printed Lab results contained within a batch including Test in Question (TIQ), Test Not Performed (TNP), and Abnormal results. The *Result Summary Report* also displays a summary of Radiology results contained within a batch listed separately from the Lab results.

- In the event there are no results for a result type (lab, radiology), only the section heading will display.

Result Summary Report

Lab Result reports contained within this batch:

Radiology Result reports contained within this batch:
 ANT, ADAM, placer-order-id-here
 BLUE, DAVID, placer-order-id-here
 EVANS, PATRICK, placer-order-id-here

Total Unique Results Printed: 3

Print job start: 04/10/09 at 11:16:13 AM
 Print job end: 04/10/09 at 11:17 AM
 Pages printed per copy: 35
 Number of copies printed: 1

- To generate an advisory message report alerting you that your batch contains Abnormal, Test in Question (TIQ), or Test Not Performed (TNP) results, select the *Enable Advisory Message Page* checkbox.

Enable Advisory Message Page

- An example of the *Advisory Message Report* is shown below.

Advisory Message Report

This page is being provided to you to highlight patient orders being received in this batch of reports that may require action on your part.

Test In Question-Please check the patient lab report for further details and contact the lab to resolve questions.
Due to potential specimen stability issues, please contact the lab as soon as possible.

ABERCROMBIE, FRED; place-order-id-here
 JONES, BILL; place-order-id-here
 SMITH, JOHN; place-order-id-here

Test Not Performed- Please check the patient lab report for further details.

BENNIS, ELAINE; place-order-id-here
 SMITH, JOHN; place-order-id-here
 YOUNG, JOE; place-order-id-here

- The *Advisory Message Report* highlights patient orders being requested in a batch that contain Test in Question (TIQ) and Test Not Performed (TNP) results.

Notes:

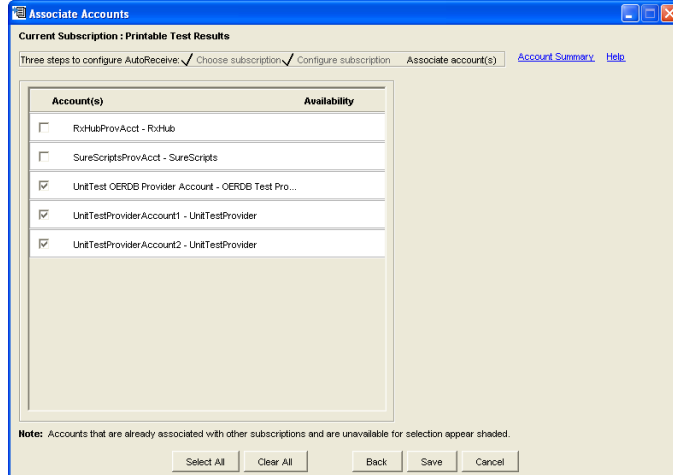
- The *Enable Print Summary Page* and *Enable Advisory Message Page* checkboxes are selected by default for new subscriptions.
 - When the *Print* checkbox is selected, the *Enable Print Summary Page* and *Enable Advisory Message Page* checkboxes will be enabled. When the *Print* checkbox is cleared, these checkboxes will be disabled.
 - If there are reports with an advisory message (TIQ, TNP), these will print before the rest of the results within the batch.
 - If you have requested advisory messages for a result category, and there are no messages for that category when the report is run, no corresponding heading for that category will appear in the *Advisory Message Report*.
- To save test results, select the *Save files to disk* checkbox, and then type the directory or network path where you want to save the files. For example, type `C:\AutoReceive Printable Results`.

To locate the directory or network path where you want to save the printable results, click *Browse*. To test your configuration settings, click *Test*. A sample document (test.pdf) is downloaded and printed and/or stored in the specified directory.

CAUTION! If AutoReceive is running as a Windows service and you specified a network drive in step 8, the *Test* button may not accurately confirm the ability to save a results file; the account under which the service runs may not have the same access permissions as the current user. If you encounter problems saving files to a network drive, try saving to a local drive, or switch AutoReceive to Classic Mode instead of Service Mode. (For more information, see [“Switching Between Service Mode and Classic Mode”](#) on page 64.)

10. When you have finished configuring the Printable subscription and have successfully tested it, click *Continue*.
11. At *Associate Accounts*, do one of the following to select the provider account(s) with which the subscription will be associated:
 - Individually select the service provider(s).
 - Click *Select All* to select all service providers.

If you want to clear the service providers, click *Clear All*, and then make your selections again.



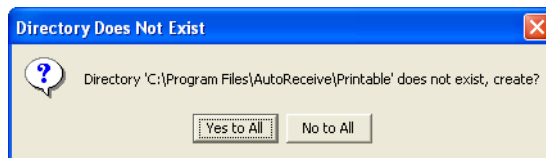
12. Do one of the following:

- To return to the previous configuration screen to make changes prior to saving, click *Back*.
- To save your selections and return to the first configuration screen, click *Save*.
If you are prompted to create a directory in which to save the results, click *Yes to all*. When you are finished configuring subscriptions, click *Close* from the configuration screen.
- To exit the subscription configuration (without saving your changes) and return to the first configuration screen, click *Cancel*.

Tips:

- If you want to clear the service providers, click *Clear All* and make your selections again.
- Accounts that appear shaded and display the status of *Pre-Assigned* are not available for selection; they are already associated with another subscription.
- If your accounts do not appear for selection on the *Associate Accounts* dialog box, contact Customer Support.

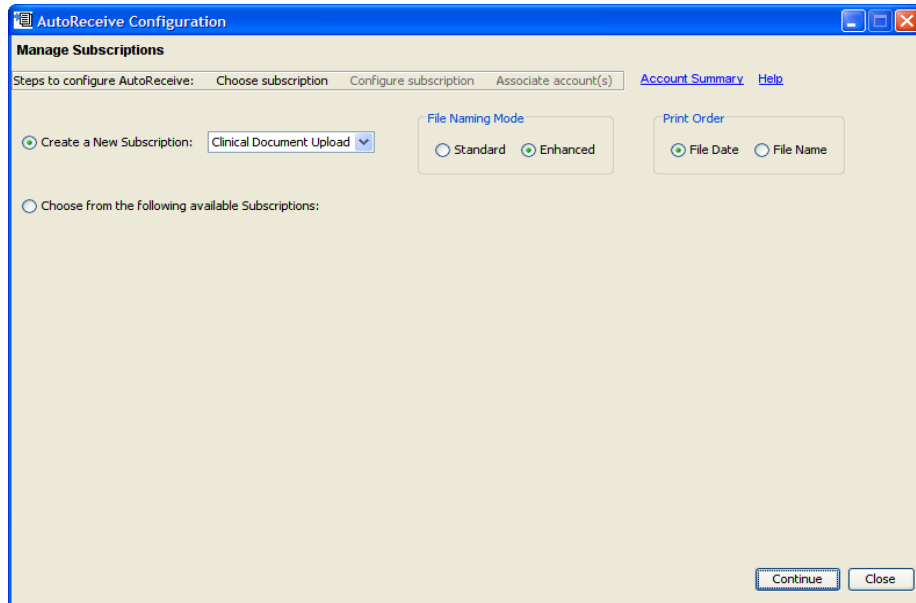
13. If you specified a directory (in step 8) that does not yet exist on your computer, you are prompted to create the new directory. To create the new directory, click *Yes to All*.



When you have completed the subscription, the *Manage Subscriptions* dialog box appears, displaying a summary of the subscription you created.

Configuring Clinical Document Uploading

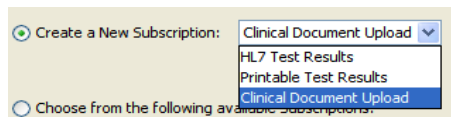
Non-electronic, clinically-relevant documents (scanned documents) can be uploaded to your computer or network drive, and transferred electronically into the Care360 EHR via the Hub. To review detailed descriptions of subscription parameters, see “Configuring Subscriptions” on page 14.



Configure Clinical Document Uploading

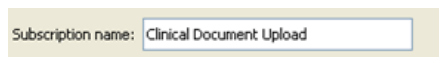
1. After your first successful login, the *AutoReceive Configuration* dialog box automatically appears, allowing you to create a new subscription.

At *Subscription type*, click and select *Clinical Document Upload*.

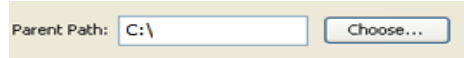


Note: This option will only be available if the Hub Account for this client has Document Upload service activated.

2. Click *Continue*.
3. At *Subscription Name*, type a subscription name for the Clinical Document Upload if you do not want to use the default name *Clinical Document Upload*.



- At *Parent Path*, click *Choose* to select the directory where AutoReceive will look for documents to be uploaded to the Hub.

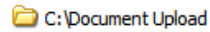


Parent Path:

Note: AutoReceive must be able to have an exclusive lock on a document before it can be uploaded. The folder selected as the Parent Path needs to have proper permissions set so AutoReceive can establish an exclusive lock on the documents.

You can only have one Parent Path per subscription.

- A folder named Document Upload is created within the selected parent path.

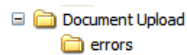


Files copied to this directory will be sent to the Hub.

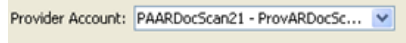
Note: The client will be responsible for ensuring documents are placed correctly in this directory.

To upload a file, AutoReceive must have the ability to gain exclusive access to the file. The Windows user that AutoReceive is running under must have write permissions to the directory involved. Also, the file cannot be marked as Read Only. The file must be copied completely to the directory before it can be uploaded to the Hub.

- A sub-folder named Errors is created inside the Document Upload folder. Files that cannot be processed because they are too large (larger than 5MB) are placed in this folder.



- Files that can't be processed because of communication failures or the inability to establish an exclusive lock will remain in the Document Upload folder and the system will try to re-send them.
 - Any folder within the Document Upload folder will not be processed.
- At *Provider Account*, select a *Provider Account* from the drop-down menu. This identifies the Org in Care360 where the documents are to be sent.



Provider Account:

Note: You can only have one Provider Account defined for a subscription.

When you have completed the subscription, the *Manage Subscriptions* dialog box appears, displaying a summary of the subscription you created.

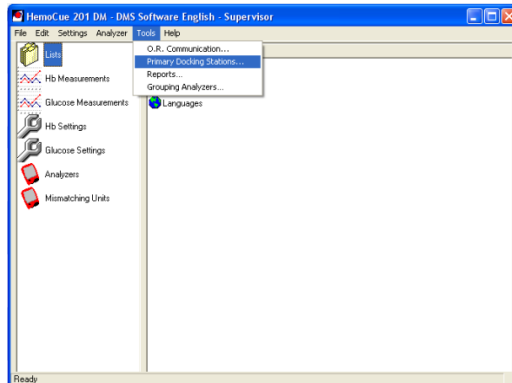
Configuring Point-of-Care Testing (POCT) Results

Point-of-Care Testing (POCT) results can be uploaded to AutoReceive using an external POCT device, for delivery through the Hub to Lab Orders and Results.

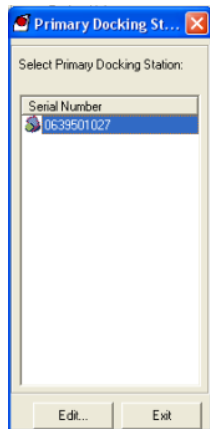
Note: For information on configuring and installing the software for a specific POCT device, refer to the device's User Manual.

Configure POCT Results

1. Start the POCT device software (refer to the device's User Manual for specific instructions).
2. Connect power to the POCT device's docking station.
3. Insert the USB cable from the external POCT device's docking station into a USB port on the computer that is running the device software (refer to the device's User Manual for specific instructions).
4. From the toolbar, select *Tools > Primary Docking Stations*.

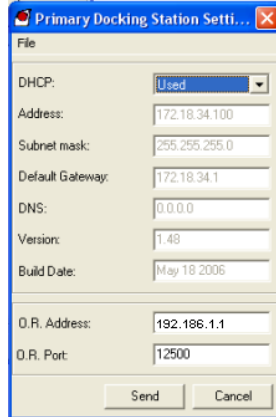


The *Primary Docking Station* dialog box appears.



5. Double-click the *Serial Number* of the docking station, or select the *Serial Number* and then click *Edit*. (The *Serial Number* is a 10-digit numeric number that can be found on the bottom of the docking station.)

The Primary Docking Station Settings dialog box appears.

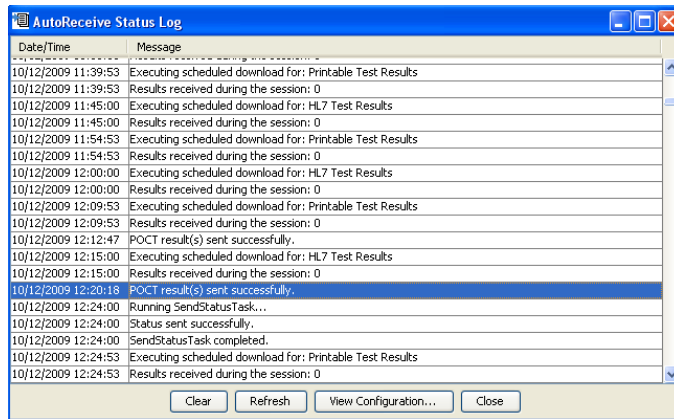


6. If *Not Used* is selected at *DHCP*, type the *Address*, *Subnet mask*, *Default Gateway*, and *DNS*, provided by the customer site in their respective fields.

The information in these fields is specified for the docking station, not the computer that is running AutoReceive. For example, if DHCP is not used, you will need an IP address assigned for the docking station. This IP address will go in the *Address* field.

7. At *O.R. Address*:, type the IP Address of the computer that is running AutoReceive.
8. At *O.R. Port*: type **12500**.
9. Click *Send*.
10. After clicking *Send*, perform the following steps:
 - a. Disconnect the USB cable from the computer.
 - b. Disconnect the power cable from the docking station.
 - c. Connect the Network cable to the docking station.
 - d. Re-connect the power cable to the docking station.
11. Use a POCT device to obtain a measurement so that the device has data to send. Then, insert the POCT device into the docking station. The results are uploaded to AutoReceive, and then automatically routed through the Hub, where they are queued for delivery.
12. Right-click on the AutoReceive Icon, and then click *View Status Log*.

The Status Log appears. If the results were delivered successfully, a status message will so state. If the delivery was unsuccessful, an error message will appear.



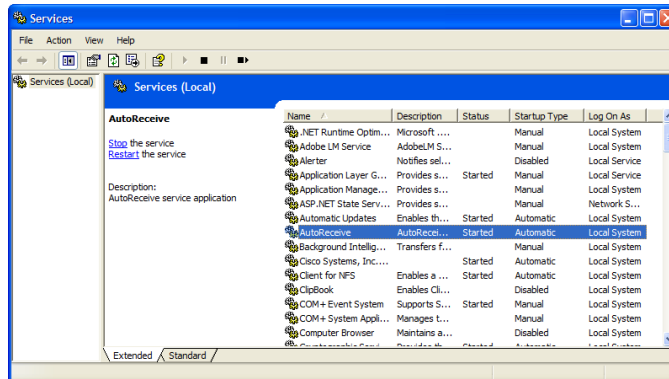
Configuring AutoReceive to Write to a Network Drive

By default, the AutoReceive service runs as the Local System account and does not have privileges to write to a network drive. In order to allow the AutoReceive Service to write to a network drive, the service must be re-configured to run using an account with the correct privileges.

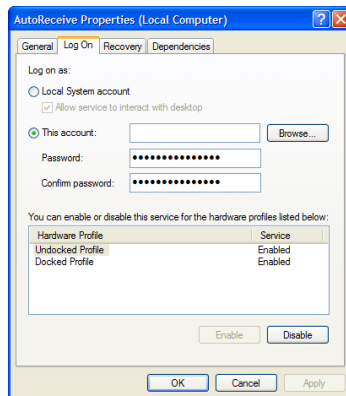
To re-configure the service, log into Windows as an Administrator and stop AutoReceive (both the UI and service if running in Service Mode). For more information, see “Starting and Exiting AutoReceive” on page 61.

Configure AutoReceive to Write to a Network Drive

1. From the Windows Start Menu, click *Settings > Control Panel > Administrative Tools > Services*.
2. From the *Services* dialog box, select *AutoReceive*.
3. Right-click on *AutoReceive*, and then click *Properties*.



- In the *AutoReceive Properties* dialog box, click the *Log On* tab.

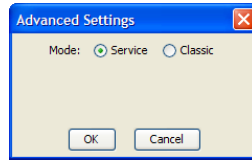


- Select the *This account* radio button.
- Confirm the account name and type the password. At *Confirm password*, type the password again.

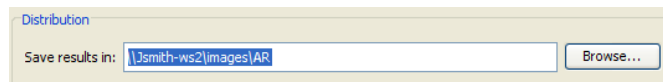
Note: Only accounts which have their "Logon as Service" permission set can be used to run a service.

4. Click *OK*.

5. Start AutoReceive. If AutoReceive is running in Classic Mode, set it to run as a Service. For information on setting AutoReceive to run as a Service, see See [“About Running AutoReceive as a Windows Service”](#) on page 4.
6. Right-click the *AutoReceive Icon* and choose *Advanced Settings* from the menu.



7. Choose the *Service* mode and click *OK*.
8. Right-click the *AutoReceive Tray Icon* and choose *Configure Subscription* from the menu.
9. Under *Distribution*, type the network path of the file in which you want to save your results.




Note: Uniform naming conventions should be used when selecting the network folder to save results to (for example, \\ComputerName\FolderName). The path should not contain a drive letter, and the folder should be accessible by the account configured above.

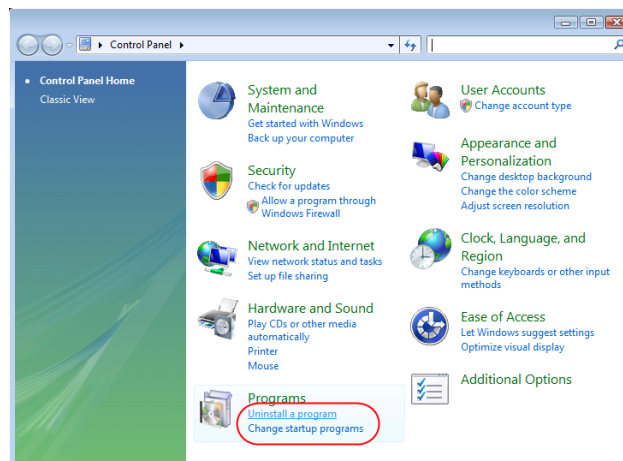
Uninstalling AutoReceive

If you need to uninstall AutoReceive, you can use the *Add/Remove Programs* option from the Windows *Control Panel*. You must exit the AutoReceive application before uninstalling. (For instructions on exiting, see “[Starting and Exiting AutoReceive \(Classic Mode\)](#)” on page 63.)

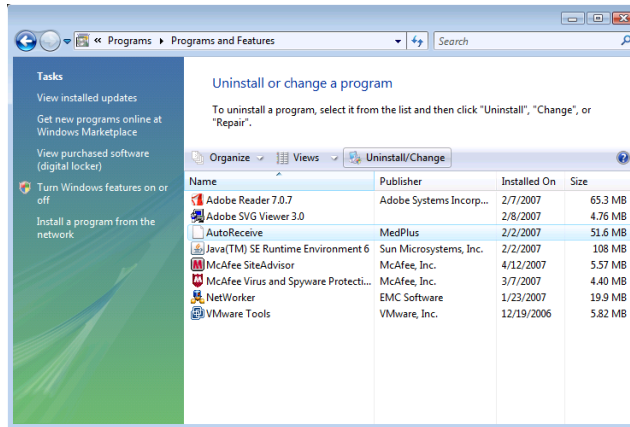
Note: You must have administrator privileges on a computer to uninstall AutoReceive from that computer.

Uninstall AutoReceive from Windows Vista, Windows 7, or Windows Server 2008

1. If AutoReceive is currently running, exit AutoReceive before you continue.
To do so, right-click the *AutoReceive* icon () in the notification area, and then click *Exit*.
2. If AutoReceive is running as a service, stop the service by doing the following:
 - a. From the Start menu, navigate to *Control Panel > Administrative Tools > Services*.
 - b. Right-click *AutoReceive*.
 - c. Click *Stop*.
3. Access the Windows *Control Panel* (for example, click *Start > Control Panel*).
4. From the *Control Panel*, under *Programs*, click *Uninstall a Program*, or double-click *Programs and Features* in Windows Server 2008.



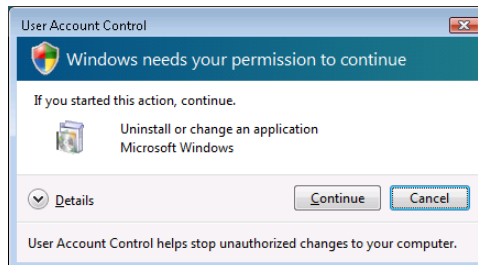
5. At *Uninstall or change a program*, select *AutoReceive* from the list of programs.



Note: If an earlier version of *AutoReceive* is installed to more than one Windows Vista, Windows 7, or Windows Server 2008 user account (on the same computer), only the first user can uninstall from the *Control Panel*. If *AutoReceive* does not appear in the list of programs, it may have been uninstalled previously from another user account. In this case, do the following:

1. Access the user's *AutoReceive* uninstall directory (for example, `C:\Users\username\AppData\Local\Program Files\AutoReceive\Uninstall_eMaxx_AutoReceive`).
2. Double-click *Uninstall eMaxx AutoReceive.exe*.
3. Continue with step 7.


6. Click *Uninstall/Change*.
7. At *User Account Control*, click *Continue* to verify that you want to uninstall *AutoReceive*.

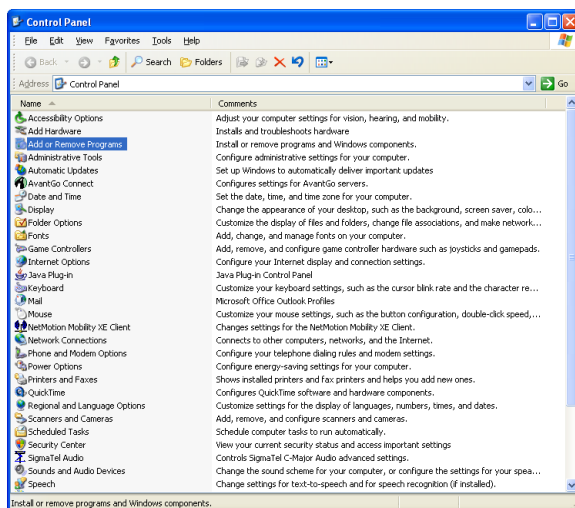


8. At *Uninstall AutoReceive*, click *Uninstall* to confirm that you want to uninstall *AutoReceive*.

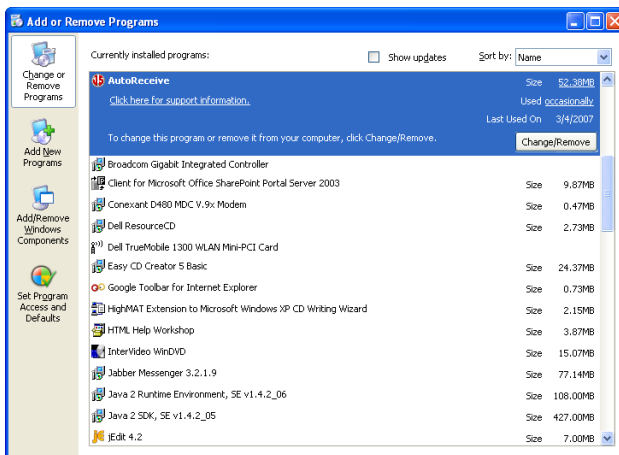


Uninstall AutoReceive from Windows XP, Windows 2000, or Windows Server 2003

1. If AutoReceive is currently running, exit AutoReceive before you continue.
To do so, right-click the *AutoReceive* icon () in the notification area, and then click *Exit*.
2. If AutoReceive is running as a service, stop the service by doing the following:
 - a. From the Start menu, navigate to *Control Panel > Administrative Tools > Services*.
 - b. Right-click *AutoReceive*.
 - c. Click *Stop*.
3. Access the Windows *Control Panel*.
For example, on Windows XP, click *Start > Control Panel*.
4. From the *Control Panel*, double-click *Add or Remove Programs*.

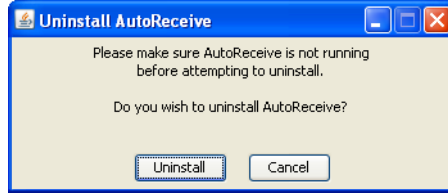


5. At *Add or Remove Programs*, select *AutoReceive* from the list of *Currently installed programs*.

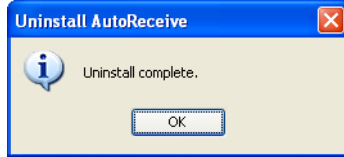


6. Click *Change/Remove*.

7. At *Uninstall AutoReceive*, click *Uninstall* to confirm that you want to uninstall AutoReceive.



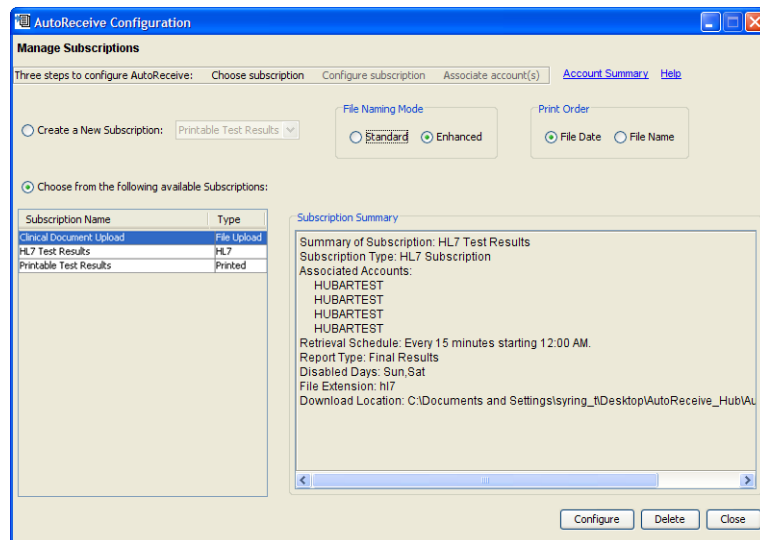
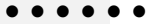
8. When the *Uninstall Complete* message appears, click *OK* to close the dialog box.



9. Close *Add or Remove Programs*.
10. Close the *Control Panel*.

Chapter 2

Using AutoReceive



In This Chapter:

- About Using AutoReceive 40
- Managing Subscriptions 41
- Changing Configuration Settings 47
- Responding to AutoReceive Connection Failures 51
- Downloading Results Manually 53
- Sending Status and Error Logs Manually 55
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- Viewing the Print Log 57
- Viewing the Status Log 58
- Viewing the Configuration Settings 60
- Starting and Exiting AutoReceive 61
- Switching Between Service Mode and Classic Mode 64



About Using AutoReceive

Once configured, AutoReceive runs automatically while your computer is on, requiring no further interaction. If you need to add, modify, or remove a subscription, or change your connection settings, you can access the AutoReceive menu options by right-clicking the *AutoReceive* icon (📧). The AutoReceive icon appears in the notification area, at the far right of the Windows taskbar.

Note: If AutoReceive is running as a Windows service, the AutoReceive icon may not appear in the notification area. To access the AutoReceive user interface, click *Start > All Programs > AutoReceive > AutoReceive*. For more information, see “[About Running AutoReceive as a Windows Service](#)” on page 4.

Managing Subscriptions


Subscriptions are usually configured following installation and remain active until you remove or modify them. You can also add new subscriptions to the document types if new accounts become available.

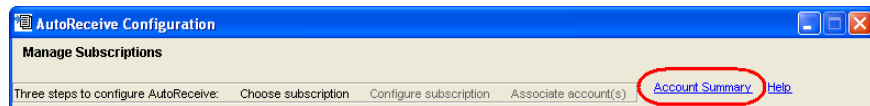
Accessing Subscription Summary Information

You can access and view subscriptions that are currently configured for your account in two locations:

- **Account Summary.** The *Account Summary* provides a brief summary of all subscriptions that are configured for each account. From the *Account Summary*, you can determine which type of subscription is configured for the account, for example, HL7 or PDF, as well as the subscription name as specified during configuration. You cannot edit the subscriptions from the *Account Summary*.
- **Subscription Summary.** The *Subscription Summary* provides a detailed view of the subscription's parameters that you specified during configuration. You can edit the parameters by selecting the appropriate subscription and selecting *Configure*. See “[Modifying a Subscription](#)” on page 44 for more information.

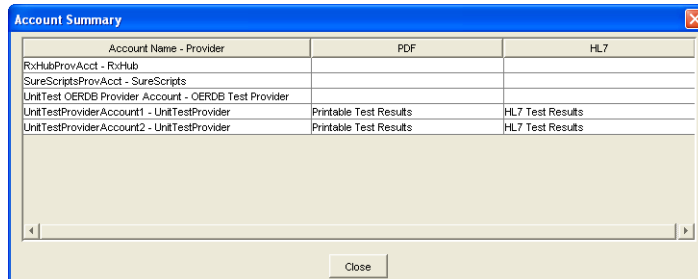
Access the Account Summary

1. Right-click the *AutoReceive* icon () in the notification area, and then click *Configure Subscriptions*.
2. At *Manage Subscriptions*, click the *Account Summary* link.



3. Review the *Account Summary*.

Subscriptions are listed by account. The name listed in the HL7 or PDF column reflects the name of the subscription as specified during configuration.




The screenshot shows a window titled "Account Summary" with a table of subscriptions. The table has three columns: "Account Name - Provider", "PDF", and "HL7".

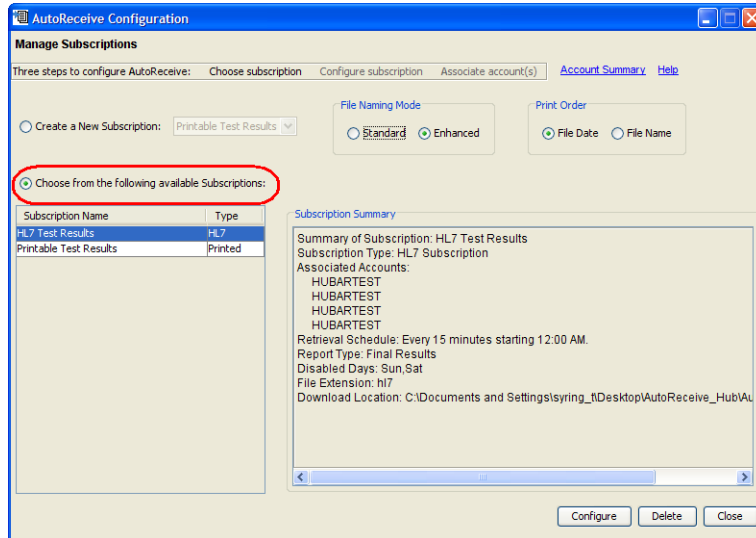
Account Name - Provider	PDF	HL7
RxHubProvAcct - RxHub		
SureScriptsProvAcct - SureScripts		
UnitTest_OERDB Provider Account - OERDB Test Provider		
UnitTestProviderAccount1 - UnitTestProvider	Printable Test Results	HL7 Test Results
UnitTestProviderAccount2 - UnitTestProvider	Printable Test Results	HL7 Test Results

Below the table is a "Close" button.

4. When you have finished reviewing the summary, click *Close*.

Access the Subscription Summary

1. Right-click the *AutoReceive* icon () in the notification area, and then click *Configure Subscriptions*.
2. At *Manage Subscriptions*, select *Choose from the following available subscriptions*.



3. From the list of available subscriptions, select the desired subscription.
4. To view and/or modify the configuration for the selected subscription, click *Configure*.


For additional information on modifying subscriptions, see “[Modifying a Subscription](#)” on page 44.

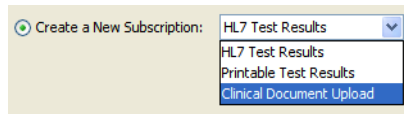
Adding a Subscription

You can add a new subscription any time there is an available provider account that is not yet associated to a subscription type (HL7 or PDF). Since HL7 and PDF subscriptions can each be associated with one or more provider accounts, you may need to configure only one HL7 subscription and one PDF subscription, so that all your specified delivery options apply across the board to each associated account. If you need to, you can configure multiple subscriptions, one HL7 and one PDF, for each provider account, specifying unique parameters such as print locations and result types.

Note: If you select a subscription type (HL7 or PDF) that is already assigned to the available account(s), you are notified that it is unavailable for configuration.

Add a Subscription

1. Right-click the *AutoReceive* icon () in the notification area, and then click *Configure Subscriptions*.
2. At *Manage Subscriptions*, select *Create new subscription*.
3. Click either *HL7 Test Results*, *Printable Test Results*, or *Clinical Document Upload*.




4. Click *Continue*.

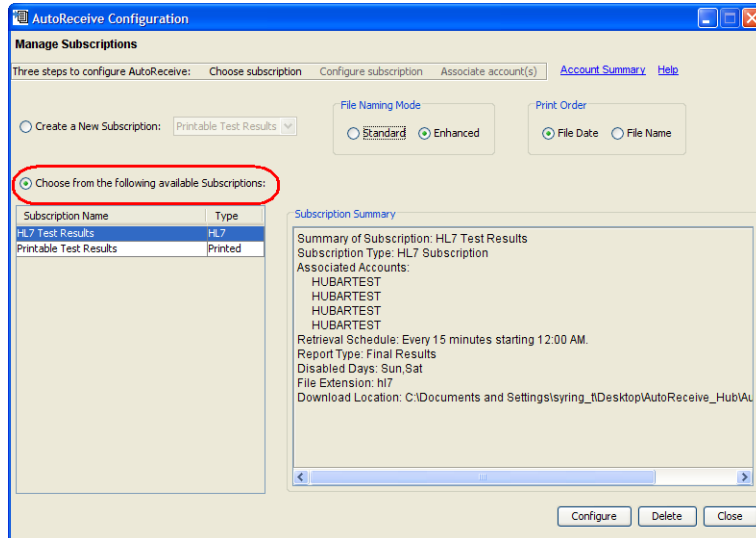
See “[Configuring HL7 Test Results](#)” on page 16, “[Configuring Printable Test Results](#)” on page 21, or “[Configuring Clinical Document Uploading](#)” on page 27 for more information on configuring document types and specifying subscription parameters.

Modifying a Subscription

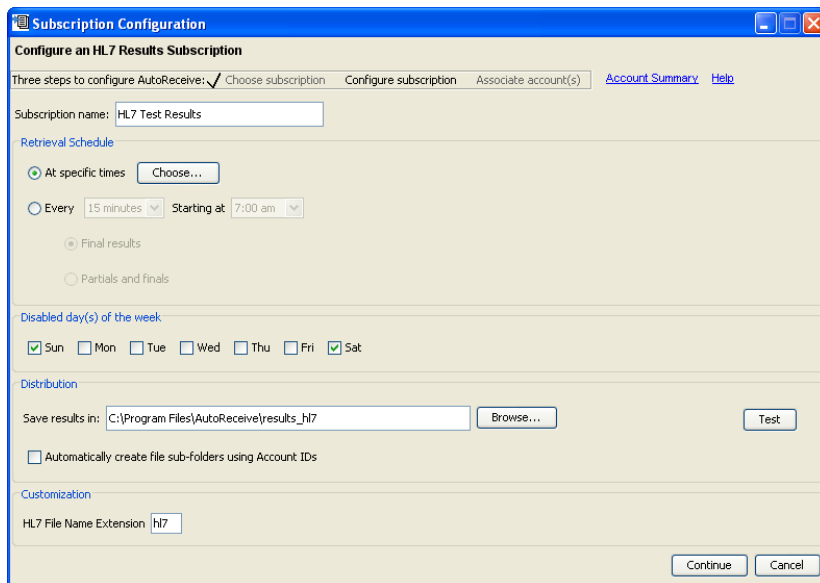
If you need to make changes to a subscription (for example, routing your results to a different printer), you can access the subscription's existing configuration and make the necessary changes. You can also adjust the interval at which you receive results, or change account associations.

Modify a Subscription

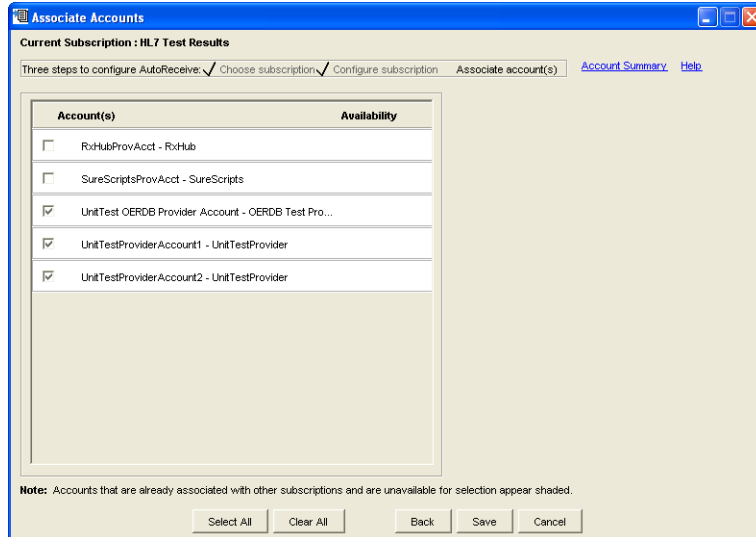
1. Right-click the *AutoReceive* icon () in the notification area, and then click *Configure Subscriptions*.
2. At *Manage Subscriptions*, select *Choose from the following available subscriptions*.



3. From the list of available subscriptions, select the subscription that you want to modify.
4. Click *Configure*.
5. Make any necessary changes to the configuration, and then click *Continue*.



6. At *Associate Accounts*, select or clear (as appropriate) the account(s) to which the modified subscription parameters should be applied.




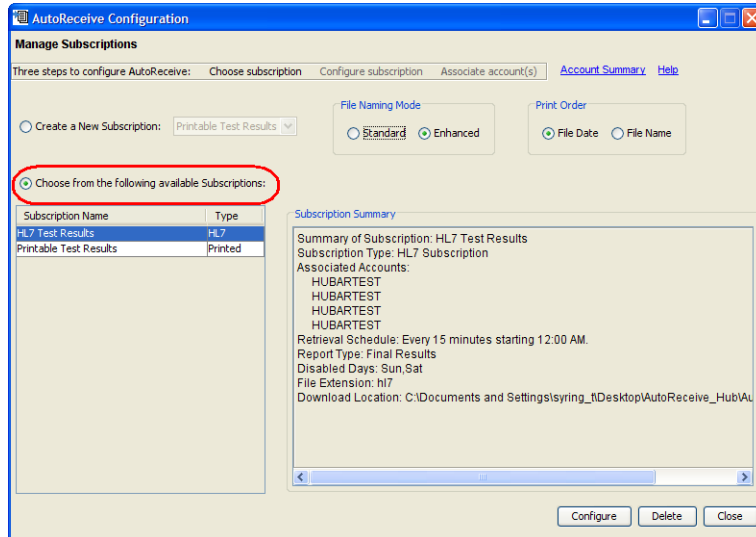
7. Do one of the following:
- To return to the previous configuration page to make changes prior to saving, click *Back*.
 - To save your selections and return to the *Manage Subscriptions* page, click *Save*. If you are finished configuring subscriptions, click *Close*.
 - To exit the subscription configuration without saving your changes and return to the *Manage Subscriptions* page, click *Cancel*.

Removing a Subscription

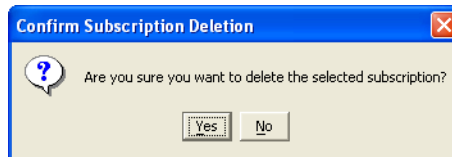
If you are no longer receiving results from a service provider, you can remove the associated subscription from AutoReceive. Also, if there are any connectivity problems with a particular service provider, you can remove the subscription to avoid gathering error messages in your *Status Log*, and then reconfigure the subscription again when the problem is resolved. See “[Viewing the Status Log](#)” on page 58 for more information.

Remove a Subscription


1. Right-click the *AutoReceive* icon () in the notification area, and then click *Configure Subscriptions*.
2. At *Manage Subscriptions*, select *Choose from the following available subscriptions*.



3. From the list of available subscriptions, select the subscription that you want to delete, and then click *Delete*.
4. When prompted, click *Yes* to confirm the deletion.



Changing Configuration Settings

Your login information and modem connection settings that you configured during installation and setup remain active until you change them. To change these settings manually, access the right-click menu from the *AutoReceive* icon () in the notification area.

Note: If you receive an authentication error (your login information is not accepted), contact your System Administrator to determine if changes have been made to your login credentials.

Changing Login Information


If you need to change your login information, call your System Administrator to get the appropriate *Username* and/or *Password* before accessing the menu options to make changes.

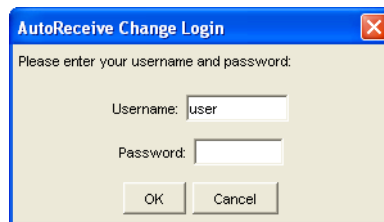
If you receive an authentication error (your login information is not accepted), contact your System Administrator to determine if changes have been made to your login credentials.

Notes:

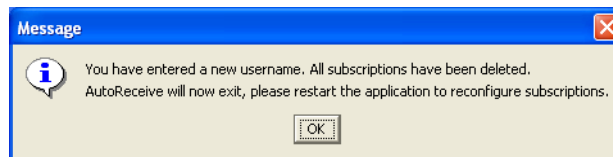
- If you change only your *Password*, your subscriptions are saved. If you change both your *Username* and *Password*, the subscriptions for the previous *Username* are deleted and you must reconfigure them.
- Your System Administrator can provide you with valid login information and make sure your new information is successfully accepted.

Change Login Information

1. Obtain the new login *Username* and/or *Password* from your System Administrator.
2. Right-click the *AutoReceive* icon () in the notification area, and then click *Change Login Information*.
3. Type the new account *Username* or *Password*, and then click *OK*.





A message box appears, indicating that the *Username* has been changed, and that all existing subscriptions will be deleted.



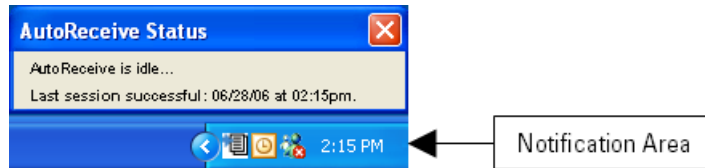
4. Click *OK* to close the message box.
5. Restart *AutoReceive*, and create one or more new subscriptions.

For information on starting *AutoReceive*, see “[Starting and Exiting AutoReceive](#)” on page 61.

Changing Notification Options

After you have logged into AutoReceive, it remains active, running in the background until you log off or close the application. The program icon () in the notification area indicates that AutoReceive is running. When an AutoReceive communication session is in progress, that is, when results are being downloaded or when the application is being automatically updated, the system icon changes to a communication icon () until the session ends, at which time it reverts to the normal icon.


In addition to the communication icon, you can monitor the status of communication sessions by choosing to display a small status window on your screen that provides information about the success or failure of communications activity such as connections, downloads, saves to disk, printing and system updates.

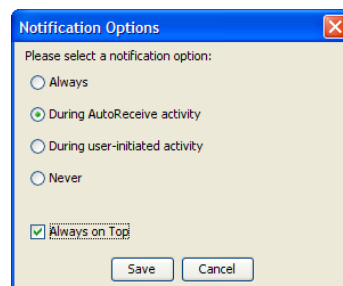


- The upper text line of *AutoReceive Status* displays the state of AutoReceive, or what action is occurring. *Idle* indicates that AutoReceive is connected, but no data is being received at this time.
- The lower text line displays the time and completion status of the last communication session. If a communication session is unsuccessful, an alert message displays in this location.
- You can drag the *AutoReceive Status* window from its default location above the notification area to any place on the screen. It remains in your preferred position until you change it.

You must have at least one subscription configured before you can set *Notification Options*. The option you set applies to all subscriptions; options for different subscription types cannot be separately configured.

Change Notification Options

1. Right-click the *AutoReceive* icon () in the notification area, and then click *Notification Options*.
2. Select one of the following options:



- **Always.** The status window appears after the startup process has completed, and remains visible until you exit AutoReceive.

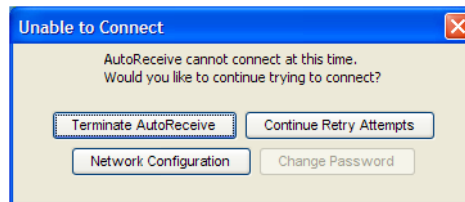
Responding to AutoReceive Connection Failures

AutoReceive opens and connects to the server each time you start your computer. If AutoReceive cannot connect to the server when it starts, either after a restart or when you initially turn on your computer, you are prompted to exit AutoReceive or let the system try to connect to the server. The system will make connection attempts every 10 minutes for a maximum of one hour, after which it will try to connect every 90 minutes for an indefinite period of time or until you close AutoReceive.

After 48 hours, if a connection has not been established, a dialog box appears from which you can either close AutoReceive or let the system continue trying to connect at 90-minute intervals. If you choose to let the system continue trying to connect, the dialog box reappears after another 48-hour interval of unsuccessful connection. Once AutoReceive begins retrying connection at 90-minute intervals, it continues to do so until connection is established—even if you have not responded to the dialog box prompts—or until you close it, which you can do at any time (see “Starting and Exiting AutoReceive” on page 61).

Respond to AutoReceive Connection Failures

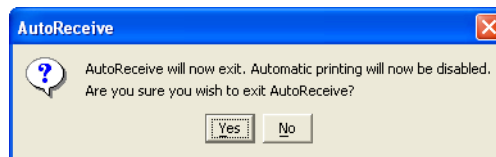
1. At *Unable to Connect*, do one of the following:



- To close the program and discontinue connection attempts, click *Terminate AutoReceive*.
- To close the dialog box and allow AutoReceive to continue trying to connect with the server, click *Continue Retry Attempts*.
- To update the network configuration settings, click *Network Configuration*. (For more information, see “Changing Connection Settings” on page 48.)
- To reset your password to match a new password that has been established for you by MedPlus Customer Support, click *Change Password*.

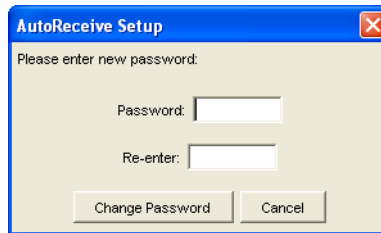
Note: The *Change Password* button appears only if the connection failure is due to a change in your password (for example, Customer Support may need to reset your password to resolve a connection issue). When your password changes, you are prompted to enter the new password the first time you attempt to log in after the change has been made.

2. Do one of the following, based on the selection you made in the previous step:
 - a. If you clicked *Terminate AutoReceive*, do one of the following to respond to the confirmation prompt:



- o To exit AutoReceive and terminate connection retry attempts, click *Yes*.

- To keep AutoReceive running, click *No*.
Connection attempts will be made every 10 minutes for the first hour, and then every 90 minutes thereafter, until you exit AutoReceive.
- b. If you clicked *Continue Retry Attempts*, but reconnection has been unsuccessful for approximately 48 hours, do one of the following when the message prompt appears:
 - To close AutoReceive, click *Terminate AutoReceive*.
 - To allow AutoReceive to continue attempting to connect, click *Continue Retry Attempts*.
- c. If you clicked *Change Password*, do the following:
 - At *AutoReceive Setup*, type (and then re-type) the new password, and then click *Change Password*.



- At *Change Password*, click *OK* to acknowledge the change.



- At *Unable to Connect*, click *Terminate AutoReceive*, and then restart AutoReceive using the new password.

Downloading Results Manually

Although AutoReceive is configured to receive results at the specific times or intervals you specify, you can request an immediate download or redownload of information.


Downloading Current Results

Instead of waiting for the automatic or timed download of results, you can manually request an immediate download of results at any time. This may be useful when you are seeing a patient whose lab results are ready but not yet received. A manual download retrieves only completed results that have not yet printed or saved. This ensures that you do not receive duplicate results.

After a manual download, the next scheduled download excludes the results you already requested (this also applies for scheduled downloads). For example, if AutoReceive is configured to download results every two hours, but you request a manual download after one hour, the next download will include only those results received during the 60 minutes after the manual download.

Note: You cannot manually download results during the subscription configuration process. You must either complete the subscription configuration or cancel out of the configuration screens prior to manually downloading results.

Download Current Results

Right-click the *AutoReceive* icon () in the notification area, and then click *Download Now*.


The results, if available, are retrieved and saved or printed according to your subscription configuration.

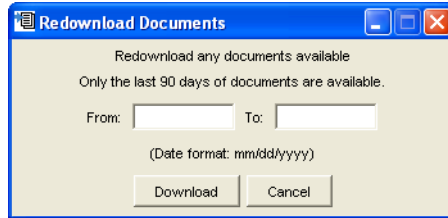
Redownloading Results

If you need to redownload results that have already been received, you can access the AutoReceive *Redownload* feature, enter the date parameters for the appropriate days, and download the results.

Note: If you are using the *Enhanced* file naming mode and need to redownload results, the redownloaded file names are generated using the current time. As a result, it is possible that there will be two identical files with different timestamps. You can determine which file to use by comparing the file names, and using the one with the latest timestamp. (For more information on the Enhanced naming mode, see “File Naming Mode” under “[Step 2: Configure Subscription](#)” on page 14.)

Redownload Results

1. Right-click the *AutoReceive* icon () in the notification area, and then click *Redownload Now*.
2. At *From* and *To*, type a date range for the redownloaded documents using the format mm/dd/yyyy.




Note: You cannot download results that are more than 90 days old.

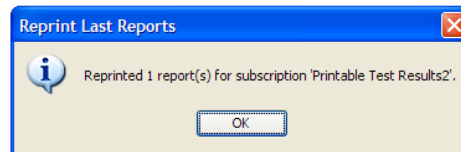
3. Click *Download*.

Reprint Last Reports

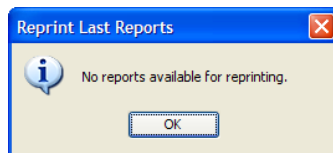
AutoReceive allows the most recent set (batch) of downloaded results to be reprinted. After a successful printable result download, the results are stored in a temporary directory within the AutoReceive install directory to allow reprinting if requested. The client can request a reprint of the last batch by right-clicking the *AutoReceive* icon and choosing *Reprint Last Reports* from the pop-up menu.

Reprint Last Reports

1. Right-click the *AutoReceive* icon () in the notification area, and then click *Reprint Last Reports*.
2. If reprinting is successful, a dialog appears informing you what was reprinted.



If no results are available for reprinting, a dialog appears informing you that no reports are available for reprinting.




Sending Status and Error Logs Manually

AutoReceive improves the process of resolving system problems and diagnosing critical errors that may occur by automatically collecting information about your configuration and use of AutoReceive. The collected information is stored in log files that are saved on your computer, and the information is periodically forwarded (automatically) to MedPlus Customer Support personnel. By default, AutoReceive sends status information every three days, and error information once a day, as needed. (If no errors occur on a particular day, then no error log is sent that day.)

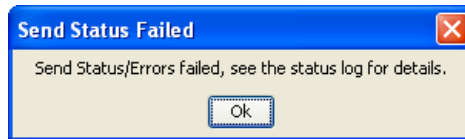
Though AutoReceive is configured to send the status and error data automatically, you can also request that the status and error information be sent immediately; for example, if you are working with Customer Support on a particular issue or error.

Send Status and Error Logs

Right-click the *AutoReceive* icon () in the notification area, and then click *Send Status/Errors*.

The latest status and error log files that are stored on your computer are sent immediately to MedPlus Customer Support. (To verify that the status and/or error logs were sent successfully, you can view the status log. For details, see [“Viewing the Status Log”](#) on page 58.)

If an error occurs when attempting to send status and error logs, a message appears, indicating the error condition.




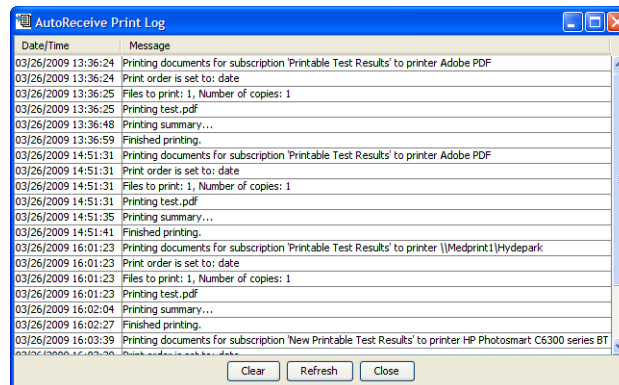
Viewing the Print Log

Any print jobs that are sent to the configured printer while AutoReceive is running are saved to a print log. You can periodically check the print log to determine whether or not the print jobs have been completed properly. If needed, you can redownload files using the date and time values from the *Status Log* to retrieve files that did not print or save. See [“Redownloading Results”](#) on page 53 for more information on re-downloading files.

Note: For instructions on configuring the printer that is used for automatic printing (for a Printable results subscription), see [“Configuring Printable Test Results”](#) on page 21.

View the Print Log

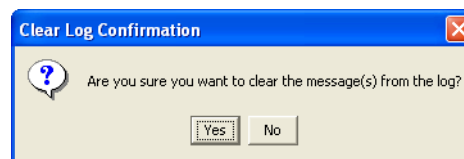
1. Right-click the *AutoReceive* icon () in the notification area, and then click *View Print Log*.
2. Review the print messages.



3. To refresh the print messages to ensure that you are viewing the latest information, click *Refresh*.
4. To clear **all** the messages, click *Clear*.

Note: You cannot clear print messages individually. If you click *Clear*, all messages are deleted from the *Print Log*.

5. When prompted, click *Yes* to confirm clearing the messages.



Viewing the Status Log

Any errors that occur while AutoReceive is running are saved to a status log. You can periodically check the status log to determine if any results retrievals have failed. If needed, you can redownload files using the date and time values from the *Status Log* to retrieve files that did not print or save. For more information, see “[Redownloading Results](#)” on page 53.

Additionally, the status log tracks when automatic and manual product updates are installed to your computer. Check the status log to see the product version that was installed and if there were any errors while attempting to update AutoReceive.


About the Error Messages

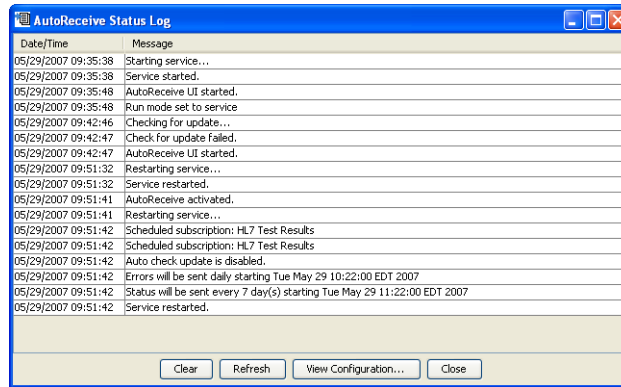
The following table includes some common error messages and their meanings.

Error	Description
Error while executing:<subscription name><message>	Problem with the subscription, service may be down.
A Remote error occurred while trying to contact the web service. Please try again later.	Service is down.
No Service Providers were found for this account.	Possible misconfiguration.
Authentication failure.	Bad credentials (for example, username or password).
Cannot retrieve document types, authentication failure.	Bad credentials.
Error printing PDF file: <message>	A corrupt PDF file or printer error. If corrupt file, contact your System Administrator.
An error occurred while retrieving document types.	Service could be down.
An error occurred while trying to contact the web service.	Service could be down.
Execution Exception: a SOAP Fault occurred while trying to contact the web service. Please try again later.	AutoReceive is having trouble connecting to the server either during startup or while trying to receive results.
Error while executing: HL7 Test Results A SOAP Fault occurred while trying to contact the web service.	The retrieval of results for an HL7 subscription that is scheduled at a particular time fails because of the SOAP fault.
Error while executing: Printable Test Results A SOAP Fault occurred while trying to contact the web service.	The retrieval of the results for a PDF subscription that is scheduled at a particular time fails because of the SOAP fault.

Note: For assistance understanding or resolving error messages, see your System Administrator.

View the Status Log

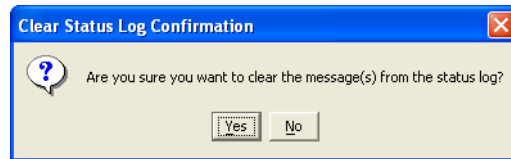
1. Right-click the *AutoReceive* icon () in the notification area, and then click *View Status Log*.
2. Review the error and/or system update messages.



3. To refresh the status messages to ensure that you are viewing the latest information, click *Refresh*.
4. To clear **all** the messages in the status log, click *Clear*.

Note: You cannot clear error messages individually. If you click *Clear*, all messages are deleted from the *AutoReceive Status Log* window.

When prompted, click *Yes* to confirm clearing the messages.




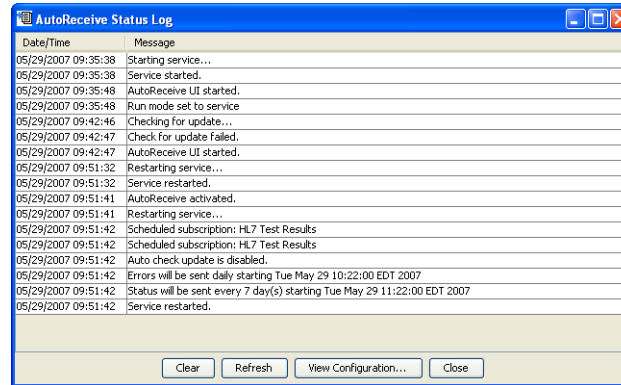
5. To close the *AutoReceive Status Log* window, click *Close*.

Viewing the Configuration Settings

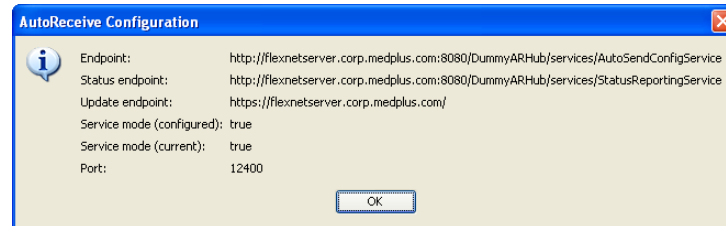
The *AutoReceive Configuration* dialog box, accessed from the *AutoReceive Status Log*, allows you to view the current *AutoReceive* configuration settings. The configuration settings are read-only, and are to be used primarily when working with Customer Support for troubleshooting purposes.

View the Configuration Settings

1. Right-click the *AutoReceive* icon () in the notification area, and then click *View Status Log*.
2. From the *AutoReceive Status Log*, click *View Configuration*.



3. View the *AutoReceive Configuration* settings.



4. To close the *AutoReceive Configuration* window, click *OK*.
5. To close the *AutoReceive Status Log* window, click *Close*.

Starting and Exiting AutoReceive

AutoReceive can run in one of the two following modes:

- As a Windows service (referred to as “Service Mode”)
- As a standard Windows application (referred to as “Classic Mode”)

Notes:

- To determine whether or not AutoReceive is running in Service Mode on your computer, you can view your current configuration settings. For instructions, see “[Viewing the Configuration Settings](#)” on page 60.
- You must run AutoReceive as an administrator under Windows Vista, Windows 7, and Windows Server 2008 (if you do not, service mode will not work correctly).

The mode in which AutoReceive runs determines how the application can be started and/or exited, as explained in this section. For instructions on starting and exiting AutoReceive in each mode, refer to the appropriate section below:

- If AutoReceive is running as a Windows service, see “[Starting and Exiting AutoReceive \(Service Mode\)](#)” on page 61.
- If AutoReceive is running as a standard Windows application, see “[Starting and Exiting AutoReceive \(Classic Mode\)](#)” on page 63.

Note: For more information about the two possible installation modes, see “[About Running AutoReceive as a Windows Service](#)” on page 4.

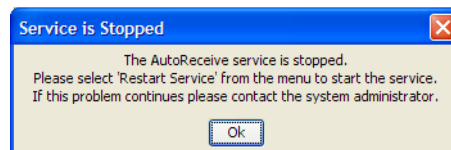
Starting and Exiting AutoReceive (Service Mode)


If AutoReceive is running as a Windows service, there are two separate components of AutoReceive, each of which is started and/or exited independently:

- **Application (Service).** The first component, the AutoReceive application (service), starts automatically each time the computer is restarted. The AutoReceive service operates in the background, and does not provide a method for stopping or exiting the service. However, if the service should unexpectedly stop running for any reason, it can be manually restarted.

You will be notified in two ways if the service is stopped:

- The following dialog box appears, informing you that the service has stopped:



- The *AutoReceive* icon in the notification area displays a red X ().

- **User Interface.** The second component, the *AutoReceive* user interface, is started via the *AutoReceive* option in your Windows *Startup* folder. The *AutoReceive* user interface starts automatically each time the computer is restarted. The *AutoReceive* user interface continues to run until you either exit it manually, or until you turn off your computer. Starting or exiting the *AutoReceive* user interface has no impact on the *AutoReceive* service, which continues to run regardless.

It is possible that the *AutoReceive* user interface may be running even if the service has been stopped. If you attempt to exit the *AutoReceive* user interface while the service is stopped (as described above), the following dialog box appears, informing you that you will **not** continue to receive subscription results until the service is restarted:




Start the *AutoReceive* User Interface (Service Mode)

Do one of the following:


- To restart the *AutoReceive* user interface manually, click *Start > All Programs > AutoReceive > AutoReceive*.
- To restart the *AutoReceive* user interface automatically (by restarting Windows), click *Start > Shut Down*, select *Restart*, and then click *OK*.

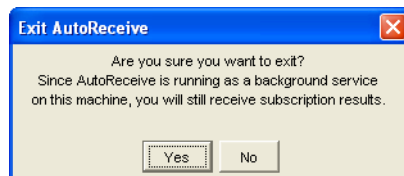
Note: Procedures may vary slightly based on your Windows operating system.

Restart the *AutoReceive* Service (Service Mode)

1. If the *AutoReceive* user interface is not currently running, start it by following the instructions in “[Start the *AutoReceive* User Interface \(Service Mode\)](#)” on page 62. Otherwise, proceed to step 2.
2. Right-click the *AutoReceive* icon () in the notification area, and then click *Restart Service*.

Exit the *AutoReceive* User Interface (Service Mode)

1. Right-click the *AutoReceive* icon () in the notification area, and then click *Exit*.
2. When prompted, click *Yes* to confirm that you want to exit the user interface.



The AutoReceive user interface closes, but the AutoReceive service continues to run in the background. Results will continue to be received and/or printed as normal.

Note: If the *AutoReceive* icon in the notification area displays a red X (🚫) (meaning the service has been stopped) when you exit the user interface, you will **not** continue to receive subscription results until the service is restarted.

Starting and Exiting AutoReceive (Classic Mode)

If AutoReceive is running as a standard Windows application on your computer, the application opens each time the computer is restarted. AutoReceive continues to run until you either exit the application manually, or until you turn off your computer.

If you need to manually exit AutoReceive due to printer, connectivity, or network issues, you must manually restart AutoReceive in order to resume receiving results. To discontinue receiving results without turning off your computer, you can exit AutoReceive manually.

Start AutoReceive (Classic Mode)

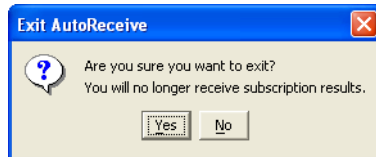
Do one of the following:

- To restart AutoReceive manually, click *Start > All Programs > AutoReceive > AutoReceive*.
- To restart AutoReceive automatically (by restarting Windows), click *Start > Shut Down*, select *Restart*, and then click *OK*.

Note: Procedures may vary slightly based on your Windows operating system.

Exit AutoReceive (Classic Mode)

1. Right-click the *AutoReceive* icon (📄) in the notification area, and then click *Exit*.
2. When prompted, click *Yes* to confirm that you want to exit the application.



AutoReceive closes, and the receipt of results is discontinued.

Note: To restart AutoReceive manually, see [Start AutoReceive \(Classic Mode\)](#) above.


Switching Between Service Mode and Classic Mode

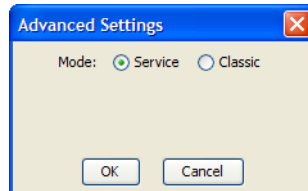
When you initially install AutoReceive, it is configured to run either as a Windows service or as a standard Windows application, depending on whether it is a new install, or is obtaining settings from a previous install of AutoReceive (for more information, see “[About Running AutoReceive as a Windows Service](#)” on page 4). Normally, once AutoReceive is successfully installed, it continues to run in its selected mode without interruption.

There are several environmental factors, however, that may impede AutoReceive’s ability to run successfully in Service Mode; for example, if you have configured a subscription to save results to a network drive, or if you are using a Windows firewall or anti-virus application that impedes AutoReceive’s communications. In these situations, it is possible to change AutoReceive’s operating mode from a Windows service to a standard Windows application to work around the issue. (It is also possible to change back to Service Mode, as needed; for example, if the impeding issue is corrected.)

Note: Refer to the AutoReceive Readme file for more information on the environmental issues that can impede AutoReceive’s Service Mode operation.

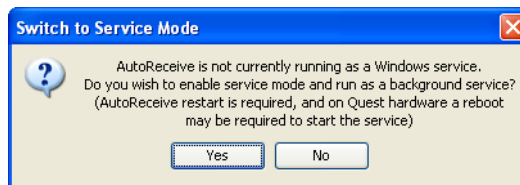
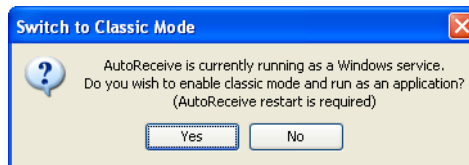
Switch Between Service Mode and Classic Mode

1. Right-click the *AutoReceive* icon () in the notification area, and then click *Advanced Settings*.
2. At *Mode*, click either *Service* or *Classic* to indicate the mode in which you want AutoReceive to operate.



Tip: The current operating mode is selected by default. To close the dialog box without making any changes, click *Cancel*.

3. When prompted, click *Yes* to confirm that you want to change AutoReceive’s operating mode. (Note that the message varies, depending on whether you are switching from Classic Mode to Service Mode, or vice versa).



4. When prompted, click *OK* to exit AutoReceive.



AutoReceive must be closed and restarted in order to run in the new mode.

5. To restart AutoReceive, click *Start > All Programs > AutoReceive > AutoReceive*.
For more information about starting AutoReceive in either mode, see [“Starting and Exiting AutoReceive”](#) on page 61.

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We'd Like to Hear From You

After you have had a chance to use the Manual and/or Help for this product, please take a moment to give us your comments. Respond to the questions below, and return this form (or send comments via e-mail) to MedPlus at your convenience. Thank you!

✓ What MedPlus product are you using? (Please provide version number)

✓ What documentation do you refer to most often?
___ Manual ___ Help

✓ What chapters or topics do you refer to most often?

✓ How often do you expect to refer to the Manual?
___ Often ___ Occasionally ___ Never
The Help?
___ Often ___ Occasionally ___ Never

✓ How is the level of detail in the Manual?
___ Too little ___ Just right ___ Too much
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✓ Does the documentation adequately explain how to get started using the product?
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