RevIntegrator Device Interface User’s Guide

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IMPORTANT NOTE: This User Manual is designed to provide practices all fundamental information required to perform the setup without assistance. However, if assistance is needed, we request that a call be scheduled with Customer Support. Due to the technical component and time required when assisting practices with device integration, a scheduled call will ensure that the appropriate Subject Matter Expert is available and has sufficient time to provide the help needed. To request a call with a Subject Matter Expert, please email customersupport@revolutionehr.com.

In addition, if you have a device rep coming onsite to help set up any new or existing equipment that will integrate with RevolutionEHR, be sure to email ahead if you believe you will need assistance from RevolutionEHR.
1. Overview

1.1 Introduction
This document is intended to provide a set of step-by-step instructions on how to install, configure, and enable the integration between the RevolutionEHR Integrator software and the various manufacturers and devices to which it connects.

This document will contain the information necessary for all of the manufacturers and devices that use the RevolutionEHR Integrator. For specific devices, search Insight by the manufacturer to get further device-specific details.

1.2 Contact Information

RevolutionEHR Customer Support
Phone: 1-877-REVEHR1 (1-877-738-3471)
Email: integrator@revolutionehr.com

Contact information for specific devices and manufacturers will be in their respective sections below.

2. RevolutionEHR Integrator

2.1 Introduction
The RevolutionEHR Integrator is software developed by RevolutionEHR that is installed on one or more computers in your office and acts as the bridge between the actual device/instrument and the RevolutionEHR servers. It will communicate with the selected device(s), read the data from the device, and then send the data to the RevolutionEHR database to the exam/patient selected by the user.

The RevolutionEHR Integrator now supports multiple languages: English and French.
2.2 System Requirements
As noted above, the RevolutionEHR Integrator is installed software, as opposed to being a web/browser based system on which the RevolutionEHR and RevolutionPHR platforms are based. As a result, there are requirements on which this software can be installed:

Supported Operating Systems
Windows 8 / 7 / Vista / XP

Memory Requirements
50M of RAM needs to be available for the application.

Hard Disk Requirements
10M of available disk space is required.

Communication (Com or Serial) Port Requirements
These requirements are specific to your device. See the specifications from your instrument vendor.

As with the Communication Port Requirements, your device/instrument vendor may have system requirements in addition to those listed above.

2.3 Installing the RevolutionEHR Integrator
The following is a list of the instructions for installing the RevolutionEHR Integrator:

1. Download the software to any of the computers that will be connected to devices at the following URL:
   http://insight.revolutionehr.com/?p=4352
2. Once the software has been downloaded, double-click on the downloaded file and you will see the following screen:

![RevolutionEHR Integrator](image)

RevolutionEHR Integrator

The installer will guide you through the steps required to install RevolutionEHR Integrator on your computer.
3. Press the Next button and the following screen will be displayed:
4. Press Next and the following screen is displayed:

```
Confirm Installation

The installer is ready to install RevolutionEHR Integrator on your computer.

Click "Next" to start the installation.
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5. Press Next and the following screen is displayed:

RevolutionEHR Integrator

Installation Complete

RevolutionEHR Integrator has been successfully installed.
Click "Close" to exit.

Please use Windows Update to check for any critical updates to the.NET Framework.

6. Press Close. The software has been installed and you should see a RevolutionEHR Integrator icon on your desktop.
2.4 Configuring the RevolutionEHR Integrator

Once the software has been installed, it is now time to configure it to communicate with the RevolutionEHR server and the appropriate device(s).

1. To configure, double-click on the RevolutionEHR Integrator icon on your desktop. The first time you run the Integrator, you will see the following screen (if you have already done through the setup/configuration, proceed to step 7):

   ![RevolutionEHR Integrator - Connection Settings](image)

   - **Environment**
     - US Production
     - US Sandbox
     - Canadian Production
     - Canadian Sandbox
     - Custom

   - **Username**
   - **Password**
   - **Location Id**

2. You will now need to enter values for the Username, Password, and Location Id fields above. To get the Username and Password values, you need to login to RevolutionEHR, go into Administration, then to General > Practice Preferences. On the Partner Integration tab, you will see a “Device Interfaces” section that will list the various device interfaces like this:
3. Select the RevEHR Integrator row and press the Enable button. It will then appear something like this:

You can then cut-n-paste the username and password fields from the grid into the Username and Password fields in the RevolutionEHR Integrator configuration/setup screen.

4. For the Location ID, you can find the location/office ID from the Administration screen under Locations, like this (ID is the first column):
5. Once you have those values, enter them into the RevolutionEHR Integrator setup screen as follows:

![RevolutionEHR Integrator - Connection Settings](image)

6. Test the configuration by pressing the Test Settings button. If there are issues, recheck the values that you’ve entered for Username, Password, and Location Id. If you continue to have issues, contact RevolutionEHR customer support.

7. When the connection succeeds, press the Save button and your entries will be saved for subsequent use.
8. You will now see the Login screen:

![RevolutionEHR Integrator - Login](image)

9. To Login, enter your **RevolutionEHR** username and password. Note this is NOT the username and password that you used in Step 4 above. This is the username and password that you use to log in to the main RevolutionEHR application.
10. The system will display the main RevolutionEHR Integrator screen like this:

![RevolutionEHR Integrator Screen](image)

The left side of the screen will display the list of patients who are currently in the office (the office/location you specified by the Location ID entered in the setup). The right side of the screen will list the devices currently configured to be connected to the computer.
2.5 Adding/Configuring Devices

In order to receive data from a device, you will first need to configure the interface to the device. Each device will most likely have its own configuration and setup requirements, and those will be addressed in the device specific pages below. In general, to configure a device, from the main Integrator screen, press the Settings menu option near the top of the screen. This will display the following:

The top part of the screen will list the devices that are currently configured on this computer. It should
contain only a list of the devices connected to the current computer. The above screen does not yet have any devices configured.

**Adding a Device**

To add a device that is connected to your computer, press the Add Device button. The system will display this:

![Add Device Screen](image)

The Device dropdown will list all of the devices/models currently supported by the RevolutionEHR Integrator. The name field is how you would like the device to appear on the screens. By default, the name will be the same as the device selection.
Once you’ve selected the device and optionally changed the Name, press Add Device. This device will now be listed as a device connected to your computer as follows:
Configuring a Device

With the device selected in the top section, you can then configure any connection specifics in the bottom part of the screen as necessary for the device. In general, we have tried to set normal defaults for connection-specific parameters when possible. The configurable parameters will be highlighted in bold, whereas the read-only parameters will appear disabled. Connection-specific parameters will be described in more detail in a separate device-specific guide.

Removing a Device

If a device is no longer connected to a computer configured for that device, you can remove the device by selecting it and then pressing the Remove Device button.
Creating a Desktop Shortcut

Users can also optionally create an additional desktop icon/shortcut for a specific device. To do this, select one of the configured devices listed in the top grid, type in a name that will be used for the desktop shortcut, and then press the Create Shortcut button. Here is an example:
By creating the desktop icon/shortcut, when a user double-clicks on the desktop icon/shortcut, RevolutionEHR Integrator will automatically select the corresponding device for data capture.

Repeat the steps above for all devices connected to the current computer. Also, repeat these steps (including the installation and configuration of RevolutionEHR Integrator) for all computers in the office that are connected to supported devices.

2.6 Capturing Device Data
Once your devices have been configured, both through the above steps and steps detailed in the device-specific configuration guide, you are now ready to capture data. As mentioned above, when you log into RevolutionEHR Integrator, the left side of the main screen will list patients who are currently in the office (i.e. encounter has been started but not yet completed). If a patient encounter has been started after you had already logged into RevolutionEHR Integrator, the patient may not be listed. You can refresh the patient list by pressing the green refresh button above the grid.

To capture data for a patient, select the patient for whom you are capturing data, select the device that you are currently using (from the device list on the right side), and press the Capture Data... button. RevolutionEHR Integrator will then wait for data to be send by the device. In many cases, the Integrator will wait for some action to be performed by a user on the specific device (whatever is needed to tell the device to “send” the data to the computer).

Once the Integrator has received the data, it displays a preview of the data in a human readable format. You can review the data to see whether the data is valid and reasonable and if so, press the “Send to Revolution” button, which will send the device data to the appropriate patient encounter and test as defined for each device. On the preview screen, you can also choose to Re-Capture the data to try again. Once the data is sent to Revolution, it can be viewed in the corresponding encounter and tests specific to that device. If you are on that screen in RevolutionEHR when the capture was performed, you will need to press the screen refresh button in RevolutionEHR to see the data that was captured.