



Integration for 3M CAC

Reference Guide

Includes:

Installation Guide

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OVERVIEW

Storage and Retrieval	1
Display Considerations	2
File Sizes	2
Overlays	2
Security and Encoding	2
Licensing	2
Simplified Licensing	3
Legacy Licensing	3

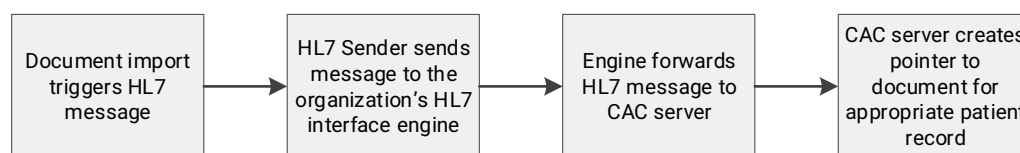
INSTALLATION GUIDE**INSTALLATION**

Requirements	5
Third-Party Software Requirements	5
Licensing	5
Before You Begin	5
Upgrade Considerations	5
Configuring the Service Account	5
Configuring the Application Server Web.config File	6
Configuring Document Types	6
Configuring HL7	7
Configuring the Export Destination	7
Configuring Message Templates	7
MSH - Message Header	7
PID - Patient Identification	8
PV1 - Patient Visit	9
TXA - Transcription Document Header	9
Configuring Message Triggers	10
New Documents	10
Updated Documents	11
Configuring the 3M 360 Encompass System	11
Mapping 3M Document Types	11
Providing Service Account Credentials	11
Contacting Support	11

The Integration for 3M CAC (Computer-Assisted Coding) exposes OnBase documents to coders through the 3M™ 360 Encompass™ System. This integration allows coders to code scanned and transcribed OnBase documents without leaving 3M 360 Encompass. Coders also can use the 3M 360 Encompass System's natural language processing engine to code OnBase documents.

Storage and Retrieval

When a new document is processed into OnBase (using scan queues, COLD, DIP, Workflow, or HL7), the OnBase HL7 module sends 3M 360 Encompass a message containing a pointer to the new document. The 3M 360 Encompass System stores the pointer and links it to the appropriate patient encounter, allowing the document to be retrieved from within 3M 360 Encompass.



When a user requests the OnBase document, 3M 360 Encompass passes the document's handle and a page range to the OnBase Application Server. The Application Server retrieves the latest revision of the document and sends it back to 3M 360 Encompass. Image documents are streamed back as individual page files to the 3M 360 Encompass System per the requested page range. Other file formats are streamed back in their entirety, as one file. Once the 3M 360 Encompass System receives the document, the application's viewer displays the document to the user.



If the document is updated within OnBase Workflow, then Workflow sends an HL7 message to notify the 3M 360 Encompass System of the update, provided the Workflow life cycle is configured to use the **Send HL7 Message** action. The next time the document is requested from within 3M 360 Encompass, the application requests a refreshed copy of the document from the OnBase Application Server.

Display Considerations

Documents retrieved using the CAC integration are displayed in the 3M 360 Encompass System viewer. For display considerations, see the following topics:

- [File Sizes on page 2](#)
- [Overlays on page 2](#)

File Sizes

Expect larger file sizes for documents scanned with higher DPIs and color depth. By default, the CAC integration supports color images and returns them in color. The integration can optionally be set to return images as black and white if disk space on the CAC servers is a concern. Contact your first line of support for assistance with enabling this option.

Overlays

If a document is configured to display an overlay when viewed, then the overlay is displayed when the document is viewed in the CAC application. Documents with overlays are sent to the CAC application as TIFFs.

Security and Encoding

For information about the security and encoding of documents transmitted using the CAC integration, see the following table:

Component	Security & Encoding Information
Application Server Requests	To encrypt transmitted documents, make sure the OnBase Application Server is configured to use an HTTPS connection.
HL7 Messages	HL7 messages sent from OnBase are encoded using MLLP encoding. The receiving HL7 system must be able to handle MLLP-encoded messages.
User Privileges	Coders do not require OnBase user accounts or privileges to retrieve OnBase documents from within the 3M 360 Encompass System. Access to OnBase documents is controlled by 3M security.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Integration for 3M CAC functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see [Simplified Licensing on page 3](#).

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see [Legacy Licensing on page 3](#).

Simplified Licensing

In addition to an enterprise base package license for standard OnBase functionality, one or more add-on package licenses are required to access the following functionalities:

- Integration for 3M CAC
- HL7 Listener or Basic HL7 Listener

For more information on the packages available to you, contact your account manager.

Legacy Licensing

The Integration for 3M CAC requires a valid Client license and the following licenses:

- Integration for 3M CAC
- HL7 Listener or Basic HL7 Listener



Integration for 3M CAC

Installation Guide

Requirements

Integration for 3M CAC requires the OnBase HL7 Module and the OnBase Application Server. See the requirements for these modules and others in the **Installation Requirements** manual.

Third-Party Software Requirements

Integration for 3M CAC requires the 3M 360 Encompass System (July 2013 SP2 or higher).

Contact your 3M support team to ensure your 3M 360 Encompass solution meets the requirements for the Integration for 3M CAC.

Licensing

See [Licensing on page 2](#) for licensing requirements.

Before You Begin

The OnBase Integration for 3M CAC requires the OnBase HL7 Module and the OnBase Application Server. For installation steps, see the **Application Server** and **HL7 Module** module reference guides.

Documents are displayed to 3M 360 Encompass users using the 3M 360 Encompass System's viewer. The coders' workstations do not need the OnBase document viewer installed.

Upgrade Considerations

Please refer to the **Application Server** and **HL7 Module** documentation for upgrade considerations that may affect this integration.

If your solution includes OnBase Workflow, please also refer to the upgrade considerations in the **Workflow** documentation.

Configuring the Service Account

The OnBase service account is required for the Application Server web service to retrieve OnBase documents for the 3M 360 Encompass System. When the 3M 360 Encompass System requests a document, it provides the Application Server with the service account's user name, password, and data source.

OnBase service accounts are configured in OnBase Configuration. For more information, see the section on configuring service accounts in the **System Administration** documentation.

Note: The 3M 360 Encompass System does not support special characters in the credentials for the OnBase service account. Make sure the user name and password include only letters and numbers.

Configuring the Application Server Web.config File

If the 3M 360 Encompass System will not provide a data source when requesting documents from OnBase, then the Application Server's **dmsdatasource** setting must be set to the appropriate data source. If the 3M 360 Encompass System does provide the data source, then the provided value overrides the **dmsdatasource** setting in the Application Server's web.config.

Note: To protect the security of requested documents, make sure the OnBase Application Server is configured to use the HTTPS protocol.

For information about configuring the OnBase Application Server, see the **Application Server** module reference guide.

Configuring Document Types

Documents retrieved through the 3M 360 Encompass System must be configured with the following Keyword Types (names may vary depending on your system's configuration):

- Visit/Admit Date
- Patient Account Number (for billing charges)—Optional, but recommended
- Date of Birth (DOB)—Optional, but recommended
- Patient First Name
- Patient Middle Initial—Optional, but recommended
- Patient Last Name
- Patient Medical Record Number (MRN)
- Patient Visit Number
- Gender—Acceptable values include **F**, **M**, **O**, **U**, **A**, and **N**.
- Patient Class—Acceptable values include **E**, **I**, **O**, **P**, **R**, **B**, and **U**.
- Department—Optional, but recommended
- Facility

When transmitted in an HL7 message, these values help 3M 360 Encompass identify the correct encounter for the document.

1. Make sure the applicable OnBase Document Types are configured with these Keyword Types.
2. At the Document Type level, designate these Keyword Types as required for new documents.

Configuring HL7

The OnBase HL7 Module is responsible for notifying 3M 360 Encompass when OnBase documents are created or modified. Make sure the following components are properly configured as described in the following topics:

- [Configuring the Export Destination on page 7](#)
- [Configuring Message Templates on page 7](#)
- [Configuring Message Triggers on page 10](#)

Note: The following sections provide HL7 requirements specific to Integration for 3M CAC. For detailed information about HL7 configuration, see the OnBase **HL7 Module** documentation.

Configuring the Export Destination

For OnBase to send HL7 messages to the 3M 360 Encompass System, the 3M 360 Encompass System must be configured as an HL7 Export Destination in OnBase Configuration.

Under **Medical | HL7 | Export Destination**, configure an HL7 Export Destination for the 3M 360 Encompass System.

Configuring Message Templates

To notify the 3M 360 Encompass System of new and updated OnBase documents, use the **MDM^T01** and **MDM^T11** HL7 message templates.

The following **MDM^T01** and **MDM^T11** segments must be configured to ensure the 3M 360 Encompass System can uniquely identify the document and associate it with the correct encounter:

- [MSH - Message Header on page 7](#)
- [PID - Patient Identification on page 8](#)
- [PV1 - Patient Visit on page 9](#)
- [TXA - Transcription Document Header on page 9](#)

MSH - Message Header

Make sure the **MSH Message Header** segment is configured with the following values:

Field ID	Field Name	Value Type	Value
MSH.1	Field Separator	Static Value	 • This value is not configurable.
MSH.2	Encoding Characters	Static Value	^~\&

Field ID	Field Name	Value Type	Value
MSH.3	Sending Application	Static Value	ONBASE • Optional, but recommended
MSH.4	Sending Facility	Keyword Type	Facility Keyword Type
MSH.5	Receiving Application	Static Value	3MCAE
MSH.6	Receiving Facility	Static Value	3MCAE
MSH.7	Date/Time of Message	Predefined Default Value	\$\$TIMESTAMP • Format: CCYYMMDDHHMMSS
MSH.9	Message Type	Predefined Default Value	\$\$MESSAGE TYPE • Format: <Message>^<Trigger>
MSH.10	Message Control ID	Predefined Default Value	\$\$CONTROLID
MSH.11	Processing ID	Predefined Default Value	\$\$PROCESSINGID
MSH.12	Version ID	Static Value	2.4

PID - Patient Identification

Make sure the **PID Patient Identification** segment is configured with the following values:

Field ID	Field Name	Value Type	Value
PID.1	Set ID		
PID.3	Internal Patient ID	Keyword Type	Patient Medical Record Number Keyword Type
PID.5.1	Patient Name	Keyword Type	Patient Last Name Keyword Type
PID.5.2	Patient Name	Keyword Type	Patient First Name Keyword Type
PID.5.3	Patient Name	Keyword Type	Patient Middle Initial Keyword Type • Optional, but recommended
PID.7	Date of Birth	Keyword Type	Date of Birth Keyword Type • Format: YYYYMMDD

Field ID	Field Name	Value Type	Value
PID.8	Sex	Keyword Type	Gender Keyword Type
PID.18	Patient Account Number	Keyword Type	HAR Keyword Type (Epic) Patient Account Number Keyword Type (other EMR platforms) <ul style="list-style-type: none"> Optional—If this field is not populated, then PV1.19 is required.

PV1 - Patient Visit

Make sure the **PV1 Patient Visit** segment is configured with the following values:

Field ID	Field Name	Value Type	Value
PV1.1	Set ID		
PV1.2	Patient Class	Keyword Type	Patient Class Keyword Type
PV1.3.1	Patient Location	Keyword Type	Department Keyword Type
PV1.3.4	Patient Location	Keyword Type	Facility Keyword Type
PV1.19	Visit Number ID	Keyword Type	CSN Keyword Type (Epic) Patient Visit Number Keyword Type (other EMR platforms) <ul style="list-style-type: none"> Required if the PID.18 field is not populated.

TXA - Transcription Document Header

Make sure the **TXA Transcription Document Header** segment is configured with the following values:

Field ID	Field Name	Value Type	Value
TXA.1	Set ID		
TXA.2.1	Document Type	Keyword Type	\$\$DOCTYPE
TXA.4	Activity Date/Time	Keyword Type	Visit/Admit Date Keyword Type
TXA.5	Primary Activity Provider	Keyword Type	Physician ID Keyword Type <ul style="list-style-type: none"> Optional, but recommended

Field ID	Field Name	Value Type	Value
TXA.6	Origination Date/Time	Keyword Type	\$\$DOCSTORETIMESTAMP
TXA.12.1	Unique Document Number	Keyword Type	\$\$DOCNUMBER
TXA.14	Place Order Number	Keyword Type	Order Number Keyword Type • Optional, but recommended
TXA.17	Document Completion	Static Value	AU
TXA.19	Document Availability Status	Static Value	AV Note: For MDM^T11, send UN .
TXA.22.1	Authentication Person	Keyword Type	Physician ID Keyword Type • Optional, but recommended
TXA.22.2		Keyword Type	Physician Last Name Keyword Type • Optional, but recommended
TXA.22.3		Keyword Type	Physician First Name Keyword Type • Optional, but recommended
TXA.22.15		Keyword Type	\$\$TIMESTAMP

Configuring Message Triggers

For information about configuring OnBase to generate HL7 messages, see the following topics in the OnBase **HL7** documentation:

- COLD, DIP or Scan Queue Configuration for Sending HL7 Messages
- Workflow Configuration for Sending HL7 Messages

New Documents

Depending on how new documents are created, you must configure OnBase to generate HL7 messages containing the documents' information. The HL7 Sender will then send these messages to the 3M 360 Encompass System. You can configure OnBase to generate HL7 messages for new documents at the following levels:

- Scan Queue
- Document Import Processing Format
- COLD Processing Format
- Workflow (**Send HL7 Message** action)

Updated Documents

For documents updated or corrected through OnBase Workflow, you must configure the Workflow life cycle to notify the 3M 360 Encompass System of the updated content using the **Send HL7 Message** action.

Configuring the 3M 360 Encompass System

To ensure the 3M 360 Encompass System is correctly configured, see the following topics:

- [Mapping 3M Document Types on page 11](#)
- [Providing Service Account Credentials on page 11](#)

Mapping 3M Document Types

When OnBase HL7 notifies the 3M 360 Encompass System of new or updated documents, the HL7 messages include the OnBase Document Type name.

You must provide the 3M 360 Encompass System administrator with a list of OnBase Document Type names. The administrator can use this list to map OnBase Document Types to their counterparts within the 3M 360 Encompass System, or the administrator may work with the customer's interface team to translate the appropriate values in the interface engine.

Providing Service Account Credentials

The 3M 360 Encompass System must be configured to supply the correct credentials and data source for the OnBase service account. For information about the OnBase service account, see [Configuring the Service Account on page 5](#).

For information about configuring the 3M 360 Encompass System, please refer to the documentation provided by 3M.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.

- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.