Exa® PACS/RIS 1.4.30_P1

Includes topics on Exa Billing, Exa Mammo, and Exa Trans

User's Manual

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Introduction

Symbols

The following symbols may appear in the product documentation or on the product.

Symbol	Symbol Name	Symbol Description	Standard Number and Name	Symbol Reference Number
	Manufacturer	Indicates the name and address of the manufacturer	ISO 15223-1:2016	5.1.1
EC REP	Authorized Representative in the European Economic Area (EEA)	Indicates the Authorized Representative, responsible for the device in the European Economic Area (EEA).	ISO 15223-1:2016	5.1.2
	Date of Manufacture	Indicates the date when the device was manufactured.	ISO 15223-1:2016	5.1.3
⚠	Caution	Indicates information that is important for preventing loss of data or misuse of the software.	ISO 15223-1:2016	5.4.4
LOT	Batch Code	Indicates the full Software Release / Version number	ISO 15233-1:2016	5.1.5
SN	Serial number	Indicates the manufacturer's serial number so that a specific medical device can be identified	ISO 15233-1:2016	5.1.7
REF	Catalogue Number	Indicates the manufacturer's catalogue number so that the device can be identified	ISO 15233-1:2016	5.1.6
	Consults instructions for use	Indicates the need for the user to consult the instructions for use	ISO 15233-1:2016	5.4.3
Rx only	Prescription Device	Caution: Federal law restricts this device to sale by or on the order of a licensed healthcare practitioner	21 CFR 801.109(b)(1) Prescription Devices	N/A

ISO 15223-1:2016 Medical devices - Symbols to be used with medical devices labels, labeling, and information to be supplied - Part 1: General requirements

Indications for use

EXA™ is a software device that receives digital images and data from various sources (i.e. CT scanners, MR scanners, ultrasound systems, R/F Units, computed & direct radiographic devices, secondary capture devices, scanners, imaging gateways or other imaging sources). Images and data can be stored, communicated, processed, and displayed within the system and or across computer networks at distributed locations. Lossy compressed mammographic images are not intended for diagnostic review. Mammographic images should only be viewed with a monitor cleared by FDA for viewing mammographic images. For primary diagnosis, post process DICOM "for presentation" images must be used. Typical users of this system are trained professionals, nurses, and technicians.

Training

Users of this software must have received adequate training on its safe and effective use before attempting to operate the product described in this Instructions for Use. Users must make sure they receive adequate training in accordance with local laws or regulations.

Regulatory and compliance

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System requirements

The following are the minimum system requirements for clients of Exa PACS/RIS. The workstation requirements are based on typical usage scenarios. For the recommended requirements of your specific implementation, contact your Konica Minolta representative.

⚠️

RECOMMENDED: To avoid loss of functionality and data during a power loss, connect an uninterruptible power supply. When running the system by the UPS alone, always save data immediately after modifying.

REQUIRED: Install anti-virus software on the server and each client.

Server

Component	Specification
Processor	Intel® Xeon® Gold 5120 CPU @ 2.20GHz
Cores	14
Memory	32 GB
Archive Storage	1 TB partition DAS 7,200 RPM hard disk drive
OS	Microsoft Server 2012 R2 (64-bit) C:/ 250 GB SAS mirrored OS drive
Cache	500 GB SSD
Database	500 GB SSD
NIC	Single 1000 MB/s

Workstation - User

Component	Specification
CPU	Intel® Core™ i5 or later
RAM	8 GB or more
NIC	Single 1000 MB/s
Storage	HDD, 500 GB or more
OS	Windows 10 Pro, 64-bit
Monitor	20 inch, 1600 × 1200

Workstation – Reading Radiologist

Component	Specification
CPU	Intel Xeon® E-2176G (3.70 GHz, 12 MB) or later
Graphics Cards	2 NVIDIA® Quadro® P1000 cards
RAM	32 GB or more
NIC	Single 1000 MB/s
Storage	SDD, 500 GB or more
OS	Windows 10 Pro, 64-bit
Monitor	Diagnostic displays

Calibration and measurement accuracy

Measurement accuracy partially depends on image quality, which is subject to various factors including the skill of the technologist, the precision of the modalities, and image resolution. However, clinical users of Exa PACS/RIS can help ensure diagnostic image quality and accurate measurements by using appropriate viewer settings (such as window/level and zoom) and by calibrating monitors (see "Calibrate monitors").

The clinical user is responsible to judge the accuracy of the measurements based on the image quality and based on the accuracy of placed measurement points. For a table of measurement accuracies, see "Measurement Accuracy Limits" in the appendix.

New in version 1.4.30_P1

The following is a partial list of new or updated major features in version 1.4.30_P1. For more information, see the release notes.

- Ontario: Exa PACS/RIS now sets the billing class and status of claims to 'Manual review indicator' when required.
- Dispatched exams can now be grouped by dispatch ID for easier order management and billing.
- In the exam screen for technologists, users can now select to apply Tech Start, Tech End, Pause, or Unread status to all studies of the current modality within the current order.
- To prevent scheduling conflicts, selecting a time slot in a Find Slots or Available Slots dialog box now immediately reserves that time slot.
- Canada: Added columns for PHN/ULI, alternate account number, and other information to the claims and studies screens.
- When creating a patient chart, users can now choose to open the Find Slots screen immediately after saving.
- MG Tomos and other restricted SOP classes are no longer DICOM-sent to Alberta Health and other AEs.

Getting started

Configure your working environment

Internal and external setup

Configure the language in Chrome

You must configure the browser language of your client computer as follows.

1. In Chrome, click the customize ⋮ button, and then click **Settings**.
2. At the bottom of the **Settings** screen, click **Advanced**.
3. Under **Languages**, expand the **Language** row.
4. If the local language and culture is not already installed, click **Add languages** and add the language.
   Note: The culture must be correct. For example, in Canada, ensure that English (Canada) is installed.
5. Click the more actions ⋮ button for the local language, and then select the **Display Google Chrome in this language** check box.
6. Click the more actions ⋮ button again, and then click **Move to Top**.
7. Click **Relaunch**.

Sign in to the Exa platform

You can sign in to the main application, the patient portal, the physicians' portal, or the ordering facility portal. If using two-factor authentication, see "About two-factor authentication" and "Sign in using two-factor authentication."
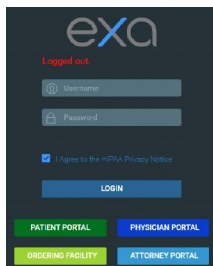
1. In Chrome, go to the URL given to you by your Konica Minolta representative.
2. Enter your sign-in credentials.
3. Select the **I agree to HIPAA Privacy Notice** check box.
4. Do one of the following:
   - To sign in to Exa PACS/RIS, click **LOGIN**.
   - To sign in to a portal, click a portal button.

About two-factor authentication

If your facility purchased two-factor authentication (2FA), administrators can use it to increase security by requiring an additional sign-in procedure. During sign-in, Exa PACS/RIS sends a character string called an *authentication token* to your email address, or one is generated by a mobile app called Google Authenticator. You can then enter that authentication token on the Exa PACS/RIS sign-in screen to finish signing in. Administrators: To make two-factor authentication available for a user, you must configure the user's email address (see "Create a user" and "Edit your user profile").

Sign in using 2FA with email

If your administrator enabled two-factor authentication, you will receive an email from the server with a verification code. Using that code, follow the steps below.

1. Sign in to Exa PACS/RIS in the usual manner (see "Sign in to the Exa platform").
2. In the **EMAIL VERIFICATION PENDING** box, paste the verification code and click **VERIFY**. Exa PACS/RIS signs you out.

3. Sign back in to Exa PACS/RIS, click **REQUEST TOKEN**, type the token sent to the email address, and then click **LOGIN**.
   Note: Every time you sign in in the future, you must repeat this step, using a different token each time.

Sign in using 2FA with Google Authenticator

After you have signed in using 2FA the first time, you have the option of using Google Authenticator rather than an email token. To use Google Authenticator to sign in, follow these steps.

1. Download the Google Authenticator app onto your mobile device.
2. In Exa PACS/RIS, on the burger menu, click the blue Konica-Minolta globe.
3. In the **My Profile** dialog box, in the **Two Factor Authentication** box, type your sign-in password and press the **Enter** key.
4. Click **SHOW QR CODE**.
5. In Google Authenticator, tap **Scan a QR Code**, and then scan the QR code displayed by Exa PACS/RIS.
6. In Exa PACS/RIS, in the **One-Time Password** box, enter the code from your new Google Authenticator profile, and then click **VERIFY**.

Reset your password

If you forgot your password, contact your Exa PACS/RIS administrator for instructions on how to reset your password.

Change your password

You can change your sign-in password.

1. Click the burger button.
2. At the top of the burger menu, click the blue Konica Minolta globe:

 or (user avatar).

3. In the **My Profile** dialog box, click **CHANGE PASSWORD**.
   Enter current and new credentials, and then click
   SAVE PASSWORD.

Add an avatar

An avatar is an image such as a photo that represents you in various parts of the program.
Prerequisites: Prepare a PNG image to use as the avatar.

1. At the top of the burger menu, click the blue Konica Minolta globe.
2. In the **My Profile** dialog box, click **Choose File**.
3. Browse for and select your avatar image, and then click **Open**.
4. Click **SAVE**.

Edit your user profile

Each user of Exa PACS/RIS has a profile with sign-in credentials and other information. After signing in, you can view and edit your information.

1. Click the burger button.
2. At the top of the burger menu, click the blue Konica Minolta globe or user's avatar:

or (user avatar).

3. In the **My Profile** dialog box, enter the following settings.

Setting	Description
User Name	Type a user name for sign-in purposes.
Name	Type your true name.
Mobile Phone/Email	Type your mobile phone number and/or email address. An email address is required for two-factor authentication.
Default Device	[Unused]
Auto Open Dictation on Device	[Unused]
Default Location	Select a facility as your default location. When you sign in, this facility appears in various parts of the program by default. You must configure the facilities that you want to make available in this list.
Always Open Schedule Book in a New Tab	Select to cause the program to open a new browser tab for the schedule book automatically when you open it.
Rows to Display	Select how many rows to display on the worklist.
Themes	Select a default theme of Bright (default) or Dark.
Culture	Select the language/culture of the user interface.
Pin Burger Menu	Select to keep the burger menu open in the left pane of the screen.
Hide Worklist Icons	Hides the lower toolbar and study row buttons on the worklist. Hidden functions remain available in shortcut menus and other controls.
Hide Order Menu	Hides the navigation menu within the edit study screen.
Bandwidth	Select the expected speed of the network on which your client installation runs. This helps to optimize performance in your networking environment.
Session Interval	Type the number of minutes to elapse before the program times out and returns to the sign-in screen.
Default Scheduling/Radiology	[Unused]

4. Click **SAVE**.

View version information

You can view version information about the application, host system, services, and external tools.

1. Click the burger ☰ button.
2. At the bottom of the burger menu, click the white Konica Minolta globe.

Create a shortcut for Exa PACS/RIS

You can create a shortcut for the local Windows user to Exa PACS/RIS and place it on the desktop.

1. In Chrome, go to the Exa PACS/RIS sign-in page.

2. In the address bar, drag the lock 🔒 icon onto the desktop.
   The Exa Login shortcut appears.
3. Optional. To change the shortcut icon:
     * Right-click the shortcut and then select **Properties**.
     * Click **Change Icon**, and then browse for and select an icon.
     * Click **OK**.

Calibrate monitors

Especially after a new installation or upgrade, you can use Exa PACS/RIS to calibrate your monitors to ensure accuracy of length and other measurements. If all images you work with contain pixel spacing information, you can skip this procedure.

Prerequisite: Enter **Calibration Width** and **Calibration Height** settings for your monitors (see "Set up connected displays").

1. Open an image in the viewer.
2. Optional: For higher accuracy, on the image shortcut menu, click **View**, and then in the submenu, click **Actual Image Size**.
3. Point to the upper-right corner of a frame, right-click the menu icon ☰, and then click **Recalibrate**.
4. Click two points on the image.
5. In the **Dialog** dialog box, type the length between the points and then click **OK**.
   Note: If prompted to apply calibration to the series, click **OK**.
   Results
     * The calipers are modified.
     * Previously annotated measurements are redrawn.
     * Future measurements will appear according to the new calibration values.

Work with the hamburger menu

The hamburger (burger) menu is the main menu of the program. To open it, click the burger menu button shown in the red circle below.
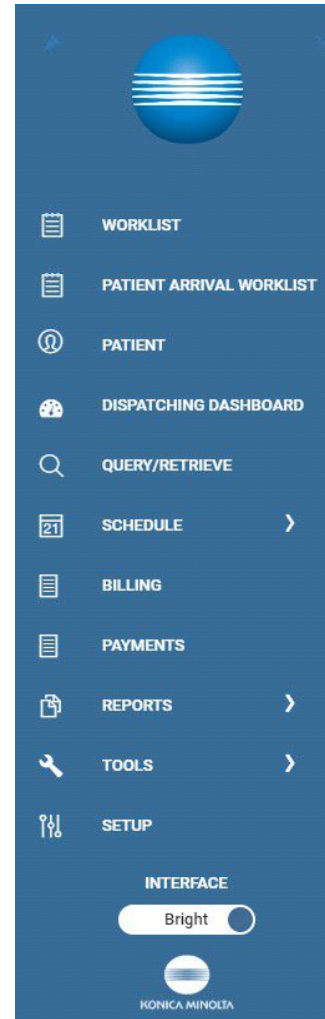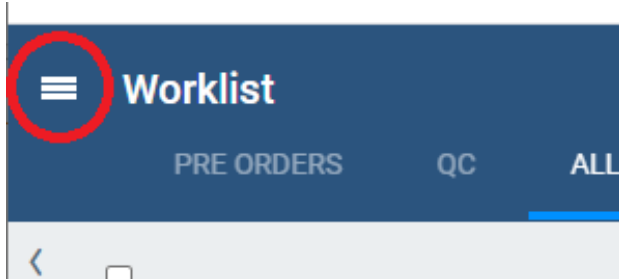
The burger menu button...

...and menu

Setup: Configure Exa PACS/RIS

Before using Exa PACS/RIS, you must configure settings and information used in various parts of the program. This section helps with the most common areas of basic configuration. For help with other detailed settings, contact your Konica Minolta representative.

Configure your company

Company settings include basic information such as name and address, but also include a range of preset options for items such as: sex, body parts, and ethnicity; patient alerts, critical findings, and cancellation reasons; MRN and accession number formats; passwords; and billing modifiers. To configure your company:

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, enter the following settings.

Setting	Description
Code	Type your internal code for your institution.
Name	Type the name of your institution.
Timezone	Select the time zone used by your institution.
Enable LDAP	If your institution uses an LDAP or Active Directory server, select this option to display the LDAP CONFIG sub-tab, and then see "Configure all LDAP settings."
Enable RCopia Service	Select to turn on the RCopia service, if available, and display the RCOPIA CONFIG sub-tab. Enter settings in the sub-tab, and then click **SAVE**.
Enable Payment Gateway	Select to turn on the Payment Gateway service, if available, and display the PAYMENT GATEWAY sub-tab. Enter settings in the sub-tab, and then click **SAVE.**
Trigger Routing on Study Flag Changed	Select to reprocess routing (DICOM transactions) automatically when a user changes a study flag.

4. Click **SAVE**.
5. Enter additional information as needed by following the steps in the subsections below.
   Note: When finished, click **SAVE** again at the top of the screen on the right side of the **Trigger Routing on Study Flag Changed** check box.

Configure general settings

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, on the **GENERAL** sub-tab, enter the following settings.

Setting	Description	
Contact Information	Enter the company address and contact information.	
Scheduling	Highlight new Patient exams on ScheduleBook	Select to highlight new patient appointments on the schedule book for easier identification.

Setting	Description	
	Highlight Color	Select the color to use to highlight new exams on the schedule book.
	Default Distance from ZIP Code	Select the default distance for finding facilities near patients.
	Enable schedule rule reason	Select to require users to select a schedule reason when creating a schedule block.
	Enable reschedule reason	Select to prompt for a reason when rescheduling an appointment.
	Enable pause reason	Select to prompt for a reason when a technologist pauses an exam.
Billing Information	Corporate Office Type	Select Person for an individual practice. Otherwise, select Non-Person Entity.
	NPI No.	Type your national provider identifier.
	Taxonomy Code	Type your NPI taxonomy code.
	Tax ID	Type your national tax ID.
	EDI Submitter ID	If using an EDI service, type your submitter ID.
	EDI Receiver ID	If using an EDI service, type your receiver ID.
	Modifiers in Order	Forces the user to enter modifiers before creating an order.
	ICD9 to ICD10	Select to automatically convert diagnostic codes from the ICD9 to ICD10 standard.
Documents	File Store	Select a file store for scanned documents at your company. This is separate from the file store used by AEs to store images.
Security	Account Lockout Threshold	Set the maximum number of sign-in attempts.
Viewer	Viewer Titlebar Text	Select to display the patient name or the accession number on the title bar when opening a study in the viewer.
Peer Review	Schedule (how often studies are assigned to be peer-reviewed)	Select the frequency of assignment. To customize, select **Custom settings**, and then type the following in the boxes: seconds, minutes, hours, day of the month, month, and day of the week.
	Peer Review Percentage of yearly approvals	Type the percentage of studies to be assigned annually for peer review.

Setting	Description	
	Cron Custom Settings	Type a custom frequency for assigning peer reviews.
	Studies per draw amount	Type how many studies to assign per reviewer, per draw.
	Cutoff period	The number of days in the past from which Peer Review will draw studies.
	Interval	Type how often to run the peer review background service.
Email Information	Server Address	Type the address of your outgoing SMTP/mail server.
	Port	Type the mail server port number.
	User Name	Type the account administrator user name (or email address).
	Password	Type the email administrator password.
	Sender Address	Type the default sender address.
	Email Subject	Type a default email subject.

4. Click **SAVE ALL INFO**.

Configure settings

Settings here means presets that appear as options in other parts of the program.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, on the **SETTINGS** sub-tab, in the list on the left side of the screen, select one of the settings in the table below.
4. At the bottom of the screen, in the **Description** box, type a setting, and then click **SAVE**.

Setting	Description
User Titles	User prefixes, such as Mr., Mrs., and Dr.
Marital Status	Patient marital statuses, such as Single, Married, and Divorced.
Sex	Patient sexes.
Body Parts	Patient body parts under examination.
Employee Status	Statuses of employees at your institution.
Credentials	Physician credentials, such as Ph.D. and M.D.
Racial Identity	Patients' self-identified races.
Ethnicity	Patients' self-identified ethnicities.
Relationship	Relationships of people to patients (including self).
Priorities	Priorities that can be assigned to studies in the worklist. These are separate from STAT levels.

Setting	Description
Sources	Sources of patient arrivals, such as clinic referral, attorney office, hospital transfer, or emergency room.
Orientation	Lateralities as they pertain to the study.
Languages	Patients' preferred languages.
Specialties	Healthcare worker specialties such as oncology or sports medicine.
Communication Preferences	Patients' preferred methods of communication, such as cell phone or email.
Administration Site	Immunization modes.
Regions	Geographical regions, such as for grouping markets.
Units of Measure	Units of measure, such as for doses of medication or contrast material.
Needle Gauge	Available needle gauges.

Configure app settings

Settings here means presets that appear as options in other parts of the program.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, click the **APP SETTINGS** sub-tab.
4. In the list on the left side of the screen, select one of the settings in the table below.
5. At the bottom of the screen, in the **Description** box, type a setting and click **SAVE**.

Setting	Description
States	States, provinces, prefectures, or other regions.
Scan Document Types	Descriptions to assign to documents to be scanned, such as "Photo ID" or "Explanation of Benefits."
Stat Levels	Descriptions for each of the STAT levels (0–5). You can also assign a background color and text color to easily identify the STAT level on the worklist and elsewhere.
TAT	Descriptions of each TAT. Click the edit icon of a TAT to modify its description, text color, and background color. You can set the max TAT for a facility under Setup > Office > Facility.
Patient Arrival Wait Times	Color-coded descriptions corresponding to lengths of time that a patient waits upon arrival. These bands of time appear in the wait time monitor at the top of the Patient Arrival Worklist.
Access Reasons	Reasons for accessing confidential patient records when using the Break the Glass function.
Ordering Facility Types	Descriptions such as "Assisted Living" or "Prison."

Configure reason codes

Reason codes are text strings that identify reasons for taking various actions such as cancellations, follow-ups, and rescheduling. You can pre-configure them for use in various parts of the program.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, on the **REASON CODES** sub-tab, select a category.
4. Optional. If configuring a **Pause** reason (reason for technologist pausing an exam), select the **Required** check box to require the technologist to select a reason.
5. In the dialog box, click **ADD**, type a reason code, and click the save button.
6. Click anywhere outside of the dialog box to close it.

Configure the MRN format

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, on the **MRN INFORMATION** sub-tab, enter the following settings and then click **SAVE**.

Setting	Description
MRN Type	Select Default to use the default format included with Exa PACS/RIS, or Custom to define your own format.
Prefix	Type a prefix to prepend to the MRN. To be able to modify the prefix, select Can Edit.
Suffix	Type a suffix to append to the MRN.
Allow Duplicates	Select to allow duplicate MRNs.
Prefix/Suffix Max.	Select Fixed Length (above), and then type or select the maximum length of the MRN prefix and suffix.
Fixed Length	Select to specify a maximum length of the MRN.

Configure the accession number format

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, on the **ACCESSION INFORMATION** sub-tab, enter the following settings and then click **SAVE**.

Setting	Description
Prefix	Type a prefix to prepend to the accession number.
Suffix	Type a suffix to append to the accession number.

Configure AE filters

Use these settings to restrict the AE titles, IP addresses, and institutions that are associated with your company in other parts of the program.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, on the **AE FILTER** sub-tab, in each box, type an item and then click the plus ➕ button.

Setting	Description
AE Title	Add an AE title.
IP	Add an IP address.
Institution	Add an institution.

Configure a payment gateway

If you selected "Enable Payment Gateway" above, on the **Payment Gateway** sub-tab, enter settings to enable a payment gateway, such as PayPal.

Configure LDAP

If you selected **Enable LDAP** above, click the **LDAP Config**. sub-tab, and then see "Configure all LDAP settings."

Configure RCopia

If you selected **Enable RCopia Service** above, click the **RCopia Config**. sub-tab, and then enter RCopia service details.

Configure HL7 filters

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, on the **HL7** sub-tab, enter the following settings and then click **SAVE**.

Setting	Description
Receiving Facilities	Add a facility that can receive HL7 messages, and then click **ADD.**
Send Ack	Select to send an acknowledgment upon receipt of an HL7 message.

Configure password options

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, on the **PASSWORD MGT**. sub-tab, enter the following settings and then click **SAVE**.

Setting	Description	
Password Must Be between…	Type a minimum and maximum number of characters that passwords can contain.	
Passwords Must Contain …	Uppercase Letters	Exa PACS/RIS validates passwords based on these selections.
	Lowercase Letters	
	Numbers	
	Symbols or Special Characters	
'User Must Change Password Next Login' Is Checked by Default	Select or clear to assign the default state of the setting.	

Setting	Description
Force Users to Reset Their Password on a Set Schedule	Select to require password resets of a specified interval.

Configure modifiers

Modifiers are codes that provide additional detail to billing transactions.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, on the **MODIFIERS** sub-tab, scroll to the bottom of the screen, enter the following settings, and then click **SAVE**.

Setting	Description
Code	Type the CPT modifier, or other modifier code.
Description	Type the description for the code.
Fee Level	Select the fee level in the list.
Fee Override	Type the fee override code which takes precedence over any modifier created previously. To configure an override amount: In the first list select an operator (+ or -), in the box type an amount, and then in the last list select Value or %.
M1–M4	Select the modifier number to which to assign the code.
Display on Schedule Book and Print Order	Select or clear to control visibility of modifiers.

Add a market

You can add regional markets for use in other parts of the program, such as for assigning facilities.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **MARKET** tab, click **ADD**, and then enter the following settings.

Setting	Description
Code	Type your internal code for the market.
Name	Type the name of the market.
Region	Select the geographical region in which the market is located.

4. Click **SAVE**.

Add a facility

You must add at least one facility to your institution.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **FACILITY** tab, click **ADD**.
4. Enter the following settings for the facility.

Setting	Description
Code	Type your internal code for the facility (up to eight characters).
Name	Type the name of your facility.
Market	Select the market that the facility serves.
Contact No.	Type the phone number of the primary contact person at the facility.
Fax No.	Type the fax number for receiving approved reports.
Send Reports to Fax No.	Select to automatically send reports to the fax number you entered above.
Email	Type the email address of the primary contact at the facility.
Email Report Link	Select to automatically send an email when a report is created to the email address entered earlier that contains a link to view the reports on the ReportLink service.
Report Password	Type the password needed to view reports on ReportLink.
Email Attachment	Select to receive reports by attachment.
Timezone	Select the time zone used by your facility.
Mammo License ID	Type the facility's mammography license ID.
Max TAT	Type the maximum allowed turnaround time, in minutes, before a breach of contract occurs.
Enable Alt. Acc. No.	Select to use of more than one account number for a patient.
Required SSN	Select to require a social security number to provide treatment.
Require Primary Phys.	Select to require a primary physician's information to provide treatment.
PokitDok Response	[Unused]
Updox Account ID	Type your ID for signing in to Updox.
Upload Logo	Click **Choose File**, browse for and select a logo file for the facility, and then click **Open**. Logo files can be in JPEG or PNG format.
Remove Logo	To remove the current logo, click **REMOVE LOGO**.
[Address]	Type the address of the facility.
Modality Display Width	Type the column width for each modality room, in numbers of pixels.
File Store	Select the default file store to use at the facility.
Associate all appointment types to this facility	Select to automatically associate all appointment types to this facility. Clear to associate only appointment types that are themselves configured to apply to all facilities.

Setting	Description
Show Patient Alerts	Select to show a patient alert window when scheduling in the schedule book.
Show Recent Schedules	Select to display the recent schedules dialog box when: 1) scheduling a pre-order; and 2) double-clicking a patient in the Patient tab of the New Appointment screen. Days: Type the number of days in the past and future to control which exams appear in the recent schedule screen.
Enable Veterinary Registration	Select to be able to register veterinarians as physicians.
Mobile Rad Dispatching Address	Type the address of the office that dispatches mobile radiology.
Do Not Allow Overlapping Procedures to Be Scheduled	Select to prevent users from scheduling more than one procedure in the same time slot in the schedule book.
Import Documents into Study as DICOMs	Select to automatically convert documents to DICOM images before importing. If not selected, the user can select whether to convert at the time of import.
Global Auto-Print	Select to automatically send radiology reports to printer that is configured on the Exa server.
Abbreviated Receipt	Select to use an abbreviated format for payment receipts.
Custom Receipt	Select to use a custom receipt for payments, such as co-pays.
Exclude from all Portals	Select to exclude all studies associated with the facility from all portals, including when "breaking the glass."
Required Fields at Scheduling	Select fields to specify as mandatory when scheduling an exam.
Required Fields for Creating a Preorder	Select fields to specify as mandatory when creating a pre-order.
Study Status When Patient Arrives	Select the status to assign to the study when the patient arrives at check-in.
Study Status When Patient in Room	Select the status to assign to the study when the patient arrives in the exam room.
Report Delay to Patient Portal	Type the number of days to wait before making reports available on the patient portal.
Formal Name	Type the formal name of the facility, if different from the commonly used name.
Facility Notes	Type additional notes for the facility if needed.
MRN Information: Inherit	Select to copy the MRN from the EMR of origin.
Other MRN settings	See "Configure the MRN format."
The following settings become available after you save.	

Setting	Description
NPI No.	Type the national provider identifier of the facility.
Enable Insurance Eligibility	[Unused]
Federal Tax ID	Type the tax ID of the facility.
Enable Insurance Claims	[Unused]
Default Billing Provider	If using Exa Billing, select the default billing provider (the provider issuing invoices for treatment).
Service Facility	The facility providing treatment.
POS Type	Select the place of service code for the facility. To use this value as the default for all facilities, select the **Always set POS to This Value** check box.
Fee Schedule	Select the fee schedule for the facility.
Rendering Provider	The primary radiologist at the facility.

5. Click **SAVE & CLOSE**.

Add modalities

You must set up each modality available to your facility or institution in Exa PACS/RIS. In particular, you must add modalities before entering DICOM settings.

⚠ Do not add non-DICOM modalities, as this could result in problems sending studies to external PACS.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **MODALITY** tab, click **ADD**.
4. In the add/edit modality screen, enter the following settings.

Setting	Description
Code	Type the standard DICOM modality code. For example, for ultrasound, type US.
Name	Type a unique name for the modality.
Hidden on Physician Portal	Select to hide the modality name on the physician portal to prevent unwanted scheduling. Useful for hiding non-scheduled modalities such as SR.

5. Click **SAVE**.
6. In the list of modalities, click the ⊙ ⊙ buttons to order the new modality.
   Note: During modality-related tasks, Exa PACS/RIS matches modalities by the order in the list. Therefore, for example, you should list MG before SR.

Add modality rooms

Modality rooms are named locations where modalities are used for exams. You can add modality rooms for your institution for use in scheduling exams.

Prerequisite: Configure at least one modality, facility, and DICOM modality worklist.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **MODALITY ROOM** tab, click **ADD**.
4. Enter the following settings.

Setting	Description
Code	Type your internal code or name for the modality room.
Facility	Select the facility where the modality room is located.
Name	Type a name for the modality room.
From Date/To Date	Select the dates of operation.
Color Code	Click in the box, and then select a color from the picker to assign to the modality room. The color appears in a bar below the name of the modality room in the schedule book.
Display Order	Type a number to determine the horizontal display position of the modality room in the schedule book. Lower numbers appear on the left side of higher numbers.
Modalities	Select all modalities that are in use in the modality room.
DMWL	Select the AEs in the room to which to serve the worklist. Only the selected AEs will receive orders for that room.

5. On the **MODALITYTIMES** sub-tab, enter settings as needed.
6. On the **LINKED RESOURCES** sub-tab, select which treatment resource is associated with the modality room (Technologist or mobile rad Vehicle), and then type or select the name of the resource.
7. Click **SAVE**.

Add a group chat room

In a screen outside of Exa Chat, you can create group chat rooms, manage members of the rooms, and specify who can find the group chat rooms in order to join them.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **CHAT GROUP ROOM** tab, click **ADD**.

Setting	Description
Room Name	Type a name for the room.
Users	Select the members of the group chat room.
Available to	Select users that can find the group chat room when searching for a room to join.

Add a notification

You can add preset notifications that appear on the dashboard and the physician portal sign-in page under "Organizational News."

Prerequisite: Add at least one facility.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **NOTIFICATION** tab, click **ADD**.
4. Enter the following settings.

Setting	Description
Title	Type a title for the notification.
Show on Provider Portal Login	Select to display the notification on the sign-in page of the physician portal.
Show on Attorney Portal Login	Select to display the notification on the sign-in page of the attorney portal.
Description	Type the body of the notification.
Office Location	Select one or more facilities to which to send the notification.

5. Click **SAVE**.

Add tasks

Administrators can add tasks for marketing representatives, such as "Tell referring physician offices that we will start offering 3D mammography in January."

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **TASKS** tab, click **ADD.**
4. Enter the following settings.

Setting	Description
Title	Type a title for the task.
Description	Type a description of the task.
Due Date	Select a due date for the task.
Completed	Select when the task is completed.

5. Click **SAVE.**

What are authorization and eligibility?

Insurance companies and other providers may require authorization and verification of eligibility. *Authorization* involves contacting the insurance company about a procedure, providing proof of medical necessity, and obtaining permission for the procedure in the form of an authorization number. Verification of *eligibility* involves checking whether a patient's insurance policies cover the needed procedures. Eligibility verification is performed electronically with a clearinghouse through PokitDok or other verification services. If the verification service is not able to determine eligibility, it can be determined by clinical staff.

Add authorization rules

Authorization rules prevent you from scheduling an exam on a date sooner than the amount of time required to obtain insurance authorization. Adding a rule automatically adds a warning (red star) to studies on the worklist that are awaiting authorization. See also, "Manually authorize an exam."
Prerequisite: Configure at least one procedure code and insurance provider.

1. Optional. To filter the list of rules, in the **Facility** list, select a facility.
2. On the burger ▤ menu, click **SETUP**.
3. Next to the burger button, click the word in all caps, and then click **Office**.
4. On the **EXAM AUTHORIZATION** tab, click **ADD.**
5. In the **Add Authorization Rule** dialog box, configure the following settings.

Setting	Description
Facility	All facilities are selected by default. To select individual facilities, select **Choose facilities**, and then select one or more facilities in the list.
Modality	Select one or more modalities to which to apply the authorization rule.
Days	Type the minimum number of days before an exam that it must be scheduled.
Allow Scheduling	Select to allow users to schedule exams that are currently unauthorized, but that can be authorized in the future. Gives the user the option to schedule the exam, create a pre-order instead, or cancel.
Procedure Codes	Click NONE SELECTED, and then use the search bar to find and select one or more procedure codes. The authorization rule only applies to the procedures you select.
Insurance Providers	Click NONE SELECTED, and then use the search bar to find and select one or more insurance providers. The authorization rule only applies to the providers you select.

6. Click **SAVE.**

Create a study flag

You can create a study flag that users can apply to studies and orders on the worklist. Sorting the worklist by flags is one way for users to easily find groups of studies or orders to work on. You can also use them to trigger routing rules. When you create a study flag, you specify its scope of availability by institution, facility, modality, and other parameters.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **STUDY FLAG** tab, click **ADD.**
4. In the **Description** box, type a name for the flag.
5. Enter the following settings.

Setting	Description
Available in Portal	Select to make the flag available in the physicians' portal. If selected, all other settings become unavailable.

Setting	Description
Color Code	Click the box, and then select a color in the picker. This color appears in the Study Flag column in the worklist.
Institutions	Select the institutions for which the study flag is available.
Facilities	Select the facilities for which the study flag is available.
Modalities	Select the modalities for which the study flag is available.

6. Click **SAVE.**

Set monthly goals

You can set monthly goals for the number of studies to perform, for example.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **MONTHLY GOALS** tab, click **ADD.**
4. Enter the following settings.

Setting	Description
Modality	Select the modality for which to set a goal.
Goal Period	Select the month for the goal.
Monthly Goal	Type the target number of studies to perform with the selected modality.
Working Days per Month	Type the number of days in the selected month.

5. Click **SAVE.**

Configure macro notes

Macro notes are pre-configured blocks of text and metadata that you can add as notes to items in various parts of the program such as studies, schedules, and claims. Configuring macro notes ahead of time saves you from having to re-enter the same notes on multiple occasions.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **MACRO NOTES** tab, click **ADD.**
4. Enter the following settings.

Setting	Description
Description	Type a short description for the macro note to appear as the selectable option when adding notes in other parts of the program.
Macro Types	Select the context in which the macro note is available.
Facilities	Select the facilities where the macro note is available.
Modalities	Select the modality with which the macro note is available.

Setting	Description
Edit Appointment Types	Click to add or remove the appointment types for which the macro note is available.
Macro Text	Type the text of the macro note.

5. Click **SAVE**.

Configure portal links

You can add up to two custom links to the patient, provider, or attorney portal. For example, you could add a link to the patient portal that sends your patients to your company's payment website.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **PORTAL CONFIGURATIONS** tab, click a portal sub-tab, and then enter the following settings.

Setting	Description
Label	Type the link text that appears to the user. For example, `Pay Now`.
Link	Type the URL. For example, `https:\ \www.ourcompname.com\customer_payment_site`

4. Click **SAVE**.

Manage life cycles

To automatically purge aging images from the database (such as for legal or efficiency issues), you can create life cycle management (LCM) rules.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **LIFE CYCLE MANAGEMENT** tab, click **ADD**.
4. In the **LCM Rule Name** box, type a name for the rule.
5. Enter the following settings.

Setting	Description
Facility/Modality	Select the facilities and modalities whose data is subject to purging by the rule.
Data to Purge	Select one or more types of data to purge.
When to Purge	Age of Study: Select the check box, and then specify the number and category of days.
	Age of Patient: Select the check box, and then specify the age of the patient.
	Verify image instance before removing: Select the check box, and then specify the databases from which to purge the images.

5. Click **SAVE**.

Configure all LDAP settings

Enable LDAP

You can set up a connection to an Active Directory/LDAP server and synchronize users between the Exa PACS/RIS database and the LDAP server.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **Company** tab, select **Enable LDAP**.
4. On the **LDAP CONFIG**. sub-tab, under **Active Directory Server**, type the server address and other settings.
5. Under **Credentials**, type user credentials to sign in to the **LDAP server**.
6. Under **User Synchronization**, specify whether and how often to synchronize the Exa PACS/RIS database with the LDAP server.
7. Optional: To confirm your connection settings, click **CHECK CONNECTION**.
8. Optional: To synchronize servers manually, click **SYNCHRONIZE**.
9. Click **SAVE LDAP CONFIGURATION**.

About AD synchronization

Synchronize AD users and groups to ensure that the Exa PACS/RIS server has the same AD users and groups as the LDAP server. With regard to groups, a user can only be a member of one Exa PACS/RIS–related AD group at a time. The following examples illustrate how group synchronization works.

Example 1

Before synchronization	Change	After synchronization
User 1 in LDAP group A User 1 not in LDAP group B	Add user 1 to LDAP group B	User now in LDAP group B
User 1 in Exa PACS/RIS group A Exa PACS/RIS has no group B	-none-	No change

Example 2

Before synchronization	Change	After synchronization
User 1 in LDAP group A User 1 not in LDAP group B	Move user 1 from LDAP group A to LDAP group B	User now in LDAP group B
User 1 in Exa PACS/RIS group A Exa PACS/RIS has no group B	-none-	User is removed from group Exa PACS/RIS group A, but can be added back.

Synchronize AD groups

To synchronize AD groups with the LDAP server:

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **AD GROUPS** tab, click **SYNC. AD GROUPS**.
4. In the left pane, select the groups that you want to synchronize (add to the server).
5. Click **CREATE SELECTED GROUPS**.

Synchronize AD users

To synchronize AD users with the LDAP server:

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **AD USERS** tab, click **SYNC. AD USERS**.
4. In the left pane, select the users that you want to synchronize (add to the server).
5. Click **CREATE SELECTED USERS**.

Optimize LDAP for large numbers of query results

By default, windows returns a maximum of 1000 objects in response to an LDAP query, but you can increase this number. This can be useful when importing bulk accounts or other objects from Active Directory by using Adobe Connect or other means.

Find the fully qualified domain name (FQDN)

1. On the LDAP server, click **Start** > **Programs** > **Administrative Tools** > **Active Directory Domains and Trusts**.
2. In the left pane of the **Active Directory Domains and Trusts** dialog box, under **Active Directory Domains and Trusts**, find the FQDN for the computer or computers.
3. Keep this information for use in the next procedure.

Set parameters

1. On your LDAP domain controller, at the command prompt, sign in as the domain administrator.
2. Type `NTDSUTIL`, and then press **ENTER**.
3. At the `ntdsutil:` prompt, type `ldap policies`.
4. At the `ldap policy:` prompt, type `connections`.
5. At the `server connections:` prompt, type `connect to server <FQDN of domain controller>`.
6. When the connection is open, type `q`.
7. At the `ldap policy:` prompt, type show values to view the current MaxPageSize value.
8. To change the value, type: `set MaxPageSize to 30000`.
9. Optional. To confirm your in-progress change, type: `Show Changes`.
10. To commit the change, type: `commit changes`.

Configure providers and resources

You can set up individual healthcare providers, their groups and facilities, and provider pay schedules.

Configure an ordering facility

You can configure an ordering facility at your institution to be able to submit electronic orders for exams. The orders submitted appear on the PRE ORDERS tab of the worklist for scheduling.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Providers & Resources**.
3. On the **ORDERING FACILITY** tab, click **ADD**, and then enter the following information.

Setting	Description
Code	Type your internal facility code.
Name	Type the name of the facility.
Market	Select the market served by the facility.

Setting	Description
[Address]	Type or select the address and country or region of the facility.
Phone/Fax/Email	Type the contact information for the facility.
Send Fax/Email	Select the check boxes to indicate whether and how to receive approved reports.
Report Password	Type the password that the ordering facility must use to view reports generated from exams that they ordered.
Default POS Map	Select a map to the place of service, such as Google Maps.
Medicare Provider No.	Type the Medicare provider number of the facility.
CLIA No.	Type the clinical laboratory improvement amendments number of the facility.
Notes	For mobile billing, type notes to the ordering facility, and format them by using the word processing tools provided.
NPI No.	Type the national provider identifier of the facility.
Provider Agreement Code	Select the Medicare provider agreement code of the facility.
Entity Identifier Code	Select the entity identifier code of the facility (refer to the USHIK).
EIN	Type the employer identification number of the facility.
State License No.	Type the state medical license number of the facility.
ETIN	Type the ETIN to be able to use electronic transfers.
Federal Tax ID	Type the federal tax ID of the facility.
Medicaid Provider No.	Type the Medicaid provider number.
Taxonomy Code	The Medicare/Medicaid taxonomy code (refer to CMS.gov).
Medicare UPIN	If there is only one healthcare provider at the facility, and the provider has no NPI, type the unique physician identification number of the provider.
SSN	If there is only one healthcare provider at the facility, type the social security number of the provider, if available.
Contract Start Date	The start date of any mobile billing contract made with the ordering facility.
Fee Schedule	Select a fee schedule from the list. To add fee schedules, see "Configure a fee schedule."
Locations/Contacts	Select a provider associated with the ordering facility, and then click the plus [+] button.

4. Click **SAVE.**
5. Enter the following settings on the sub-tabs that appear.

Locations/Contacts

See "Add a location or contact to an ordering facility."

Providers

To view the providers at the ordering facility, click the **PROVIDERS** sub-tab.

Setting	Description
[None]	Lists providers added to the ordering facility.

Summary

To generate summaries of patients and studies at the ordering facility, click the **SUMMARY** sub-tab.

Setting	Description
Patients/Study	Select whether display patients or studies in the ordering facility summary report.
From Date/To Date	Enter a date range for the summary report.

*   Click **GO** to view the summary report.

Marketing Rep

To configure a marketing rep. for the ordering facility, click the **MARKETING REP**. sub-tab.

Setting	Description
Marketing Rep.	Select the marketing representative for the facility.
Inherited From	If inherited, enter the contact information of the origin.

1. Click **SAVE**.
2. In the **Notes**, **Follow-Ups/Tasks**, and **Contracts** areas, click **ADD** to add the corresponding items to the marketing rep.
3. In the **Patient Documents** area, click **UPLOAD** to upload documents.

Login Details

You can link users who can sign in to the ordering facility portal, and assign sign-in credentials.
1. Select a user and then click **LINK USER**.
2. Optional. To add a new user, enter credentials and click **CREATE USER**.

Credentialed Technologists

You can link technologists to ordering facilities to which they are credentialed. This ensures that mobile sites do not assign non-credentialed technologists. If no technologists are linked, all technologists are available to assign.
1. On the **CREDENTIALED TECHNOLOGISTS** sub-tab, select one or more technologists in the list.

Credentialed Radiologists

You can link radiologists to ordering facilities to which they are credentialed. Only linked radiologists can read studies of the ordering facility. If no radiologists are linked, all radiologists can read studies of the ordering facility.
1. On the **CREDENTIALED RADIOLOGISTS** sub-tab, select one or more radiologists in the list.

Linked Resources

To link technologist or vehicle resources to the ordering facility, click the **LINKED RESOURCES** sub-tab.

Setting	Description
Technologist	Select a technologist to link.
Vehicle	Select a vehicle to link.

Import an ordering facility

If you obtain exported facility information you can import those facilities.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Providers & Resources**.
3. On the **ORDERING FACILITY** tab, click **IMPORT**.
4. Click **Choose File**, browse for and select the file to import, and then click **Open**.
5. Optional. To overwrite existing facilities, select the **Update Existing** check box.
6. Click **IMPORT**.

Add a location or contact to an ordering facility

Ordering facilities can have multiple locations. For example, skilled nursing facilities (SNFs) can have different halls, each with different nurse stations or fax lines. To address this, you can add locations or contacts to an ordering facility.

1. On the burger ▤ menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then select **Providers & Resources**.
3. On the **ORDERING FACILITY** tab, open an ordering facility to edit, and then click the **LOCATIONS/CONTACTS** sub-tab.
   Note: If new fields do not appear, scroll down.
4. Click **NEW CONTACT**, and then enter the following settings.

Setting	Description
Location Name	Type the name of the location.
Phone/Fax	Type the phone number and fax number of the location.
Ordering Facility Type	Select the type of ordering facility for the location.
POS Type	Select the place of service code for the location.
Primary Contact	Select if this location is the primary contact for the ordering facility.
Billing Type	Select the billing type of the location. See "What is a billing type?"

5. Click **SAVE CONTACT**.
6. Click **SAVE & CLOSE**.

What is a billing type?

The billing type is a setting for ordering facility locations that determines how their claims are created. The following describes the available billing types.

Type	Claims	Charges	Respons. Payer	Modifier	POS	Description (or Result When Census Updated)
Global	1	Global fees	Primary insurance	None	Ordering facility location	Studies change to Billed status and are removed from the Census screen.
Split	2	Technical charges	Ordering facility	TC saved in M1 or next available.	None	• Box 20 is checked "Yes," total claim amount filled into the charges box to the right of box 20 • Box 32 filled in with rendering provider's name, address, and NPI number. • Claims change to Billed status and are removed from the Census screen. **Note:** • When there are no technical charges, the claim is created but has zero bill fees for those charges • When there are no professional charges, the claim is created but has zero bill fees for those charges • When there are only global charges, the claims is created but has zero bill fees for those charges
		Professional charges	Primary insurance	26 saved in M1 or next available.		
Facility	Any	Global fees	Ordering facility	None	Ordering facility location	Studies do not appear in the Census screen.
Census						Studies appear in the Census screen for delayed claim creation. Use this billing type for skilled nursing facilities and other locations that need to wait to determine the claim payer type.

Add a provider organization

A provider organization is a parent entity for provider groups and locations.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Providers & Resources**.
3. On the **PROVIDER ORGANIZATIONS** tab, click **Add**, and then enter the following settings.

Setting	Description
Code	Type your internal code for the organization.
Name	Type the name of the organization.
Provider Groups	Select groups that belong to the organization.

4. Click **SAVE & CLOSE**.

Add a provider group or location

If your institution works with a provider group, add it to the system.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Providers & Resources**.
3. On the **PROVIDER GROUP / LOCATION** tab, click **Add**, and then enter the following settings.

Setting	Description
Code	Type your internal code for the group.
Name	Type the name of the group.
Provider Organization	Select the provider organization to which the provider group or location belongs.
[Address]	Type and select the address and country or region of the group.
Phone/Fax No.	Type the primary contact information for the group.
Email	Type the email address of the primary contact at the group.
Report Password	Type the password that the provider group must use to view reports generated from exams that they ordered.

4. Click **SAVE**.
5. Use the **PROVIDERS** sub-tab to view or edit the list of configured providers.
6. Use the **MARKETING REP** sub-tab to add a marketing rep to the provider group.

Add a resource

A *resource* is an attorney, nurse, provider, laboratory, radiologist, technologist, or referring provider. You can add individual resources and add them to one or more provider groups. See also "Add a technologist resource."

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Providers & Resources**.
3. On the **RESOURCE** tab, click **Add**, and then enter the following settings.
   Note: The settings available differ depending on your selection in the **Type** list.

Tab/Sub-tab	Setting	Description
RESOURCE	Type	Select an Exa PACS/RIS provider type.
	Code	Type your internal code for the provider.
	Name	Type the name of the provider.
	Modality	Select the technologist's allowed modalities (see "Add a technologist resource").
	Title	Type the academic credentials of the provider (e.g. MD)
	NPI No.	Type the national provider identifier of the facility.
	Taxonomy Code	The Medicare/Medicaid taxonomy code (refer to CMS.gov).

Tab/Sub-tab	Setting	Description
	Dr. Office Name	Type the business name of the provider's office.
	SSN	Type the social security number of the provider.
	Federal Tax ID	Type the federal tax ID of the provider.
	EIN No.	Type the employer identification number of the provider.
	ETIN No.	Type the ETIN to be able to use electronic transfers.
	Medicare UPIN	If the provider has no NPI, type the unique physician identification number of the provider.
	Market	Select the market that the resource serves. All facilities in the Facilities field (below) that are associated with the selected market become selected.
	Facilities	Select all facilities with which the provider is associated.
	Specialty	Select the specialties of the provider.
	License No.	Type the state medical license number of the provider.
	Medicare Provider No.	Type the Medicare provider number of the provider.
	Medicaid Provider No.	Type the Medicaid provider number of the provider.
	Prov. Agreement Code	Type the code for the legal provider agreement code.
	POS Type	Displayed when Referring Provider is selected as the provider type.
	Fee Schedule	Displayed when Referring Provider is selected as the provider type.
	Max TAT	Assign a maximum turnaround time for the provider, in minutes. Exa PACS/RIS divides this time into 4 segments on the TAT monitor on the worklist.
Locations / Contacts	Code	Type your internal code for the provider.
	Organization	Select the provider organization of the provider.
	Group	Select the provider group to which the provider belongs.
	Email	Type the email address of the provider. This is required to receive email reports, notifications, or attachments.

Tab/Sub-tab	Setting	Description
	Contact Name	Type a contact name, such as the name of the administrative assistant of the provider.
	[Address]	Type or select the country or region and address of the provider.
	Provider Alerts	Type any alerts for the provider, such as "only takes referrals."
	Office Phone/Fax	Type the contact information for the provider's office.
	Mobile/Pager No.	Type the mobile and/or pager number of the provider.
	Phone No.	Type the personal phone number of the provider.
	Fax No.	Type the personal fax number of the provider.
	Primary Contact	Select to send reports to the referring provider only.
Reports to Me/Contact Information	Email Report Link Email Attachment Postal Mail Fax Office Fax	Select to send reports only to the individual provider, and select which methods to use. **Note**: If you select **Email Report Link** and/or **Email Attachment**, you must enter the recipient email address in the **Contact Information** area.
Reports to Group	Email ReportLink Email Attachment Postal Mail Fax Office Fax	Select to send reports to all members of the group, and select which methods to use. Provider groups have their own fields for email and fax.
Report Password	--	If you selected Email Report Link above, type the password that the provider must use to view reports generated from exams that they ordered.
Reports to Patient Portal	Delay	Type the number of days to wait before posting reports on the patient portal.
Image Delivery Options	CD Film Paper	Select which media to use to deliver images.
Notification Settings	Email	Select to receive notifications by email and/or fax.
	Receive When Added as CC Provider	Select to have the provider receive notifications by email if they are added as a CC (carbon copy) provider.

4. Click **SAVE & CLOSE**.

Add a technologist resource

When you add a technologist resource, you can specify which appointment types the technologist is allowed to perform. You can also assign schedule rules to the technologist, which prevents scheduling them for an appointment that they are not allowed to perform.

1. Follow the steps in "Add a resource" to add a resource of type Technologist, but do not click **SAVE & CLOSE**.
2. On the **ALLOWED APPOINTMENTS** sub-tab, click **ADD**.
3. In the **Edit Appointment Types** dialog box, select the check boxes for all appointments that the technologist is allowed to perform, and then click **SAVE**.
4. Optional. On the **SCHEDULE RULES** sub-tab, click an edit button to modify a schedule rule.
5. Click **SAVE & CLOSE**.

Configure a provider pay schedule

To help with billing, you can configure a pay schedule for each organization that provides radiology reading services. The schedule defines the charges by procedure, modality, and radiologist.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Providers & Resources**.
3. On the **PROVIDER PAY SCHEDULE** tab, click **ADD**, and then enter the following settings.

Setting	Description
Pay Schedule Name	Type a name for the pay schedule. Typically, this is the name or organization of the radiologist.
Start/End Date	Select a date range during which the pay schedule is valid.
Provider	Select a radiologist to assign to the providing organization, and then click the plus ✚ button. You can add multiple radiologists.
Modalities/Fee	Select one or more modalities to which to assign a fee. Type the fee to charge when using the selected modality during an exam, and then click the plus ✚ button. Add all modality/fee combinations that the provider offers.
Appointment Types/Fee	Select one or more appointment (exam) types to which to assign a fee. Type the fee for the selected exam, and then click the plus ✚ button. Add all appointment type/fee combinations that the provider offers.

4. Click **SAVE.**

Configure scheduling and codes

You can set up information related to scheduling exams, including fees, body parts, appointment types, diagnostic and procedure codes, and various kinds of templates.

About fee schedules

Fee schedules define what your healthcare institution charges for procedures. There are three types of fee schedule. The *billing fee schedule* is the primary type of fee schedule, and lists the global fees before any other considerations. The *allowed fee schedule* is the contract rate agreed upon with insurance

companies, and is used for reference purposes. The *self-pay schedule* reflects discounts for cash payments made by individual patients.

Configure a fee schedule

You can configure fee schedules by following the procedure below.

Prerequisites: Configure procedure codes.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **FEE SCHEDULE** tab, click **ADD**, and then enter the following settings.

Setting	Description
Fee Schedule Name	Type a name for the fee schedule.
From Date/To Date	Select a date range during which the fee schedule is valid. The From date must be the current day or earlier.
Type	Select a type from the list (see "About fee schedules").

4. Click **SAVE.**
5. On the **FEE SCHEDULE** tab, find the schedule you just added, and then double-click to open it.
6. Click **ADD PROCEDURE**, select one or more procedures in the list, and then click **SAVE.**
   Note. To find procedures to add, enter one or more of the following search criteria, and then click **SEARCH**.

Setting	Description
Add To	Shows the name of the current fee schedule.
Facilities	Select the facilities that provide the procedure.
Code	Type the code for the procedure.
Short Description	Type one or more characters in the description of the procedure.
Modalities	Select the modalities used in the procedure.
Ref. Code	Type the reference code for the procedure. In most cases this can be the CPT or LOINC code.
NDC Code	Type the national drug code associated with the procedure.
Service Type	Select a service type in the list.

7. On the **FEE SCHEDULE** tab, click **SAVE.**

Import or export a fee schedule

You can import a fee schedule from another Exa PACS/RIS installation, or export a fee schedule from your current installation.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **FACILITY FEE SCHEDULE** tab, double-click an existing fee schedule to open it.
4. To import a fee schedule:
   a) Click **IMPORT FEE SCHEDULE**.
   b) Click **Choose File**, browse for and select a file to import, and then click **Open**.

     c) Click **IMPORT**.

5. To export the current fee schedule to your Windows Downloads folder, click **EXPORT FEE SCHEDULE**.

Configure a facility fee schedule

It can be useful to configure individual facility fee schedules: if your fees differ by facility; for teleradiology; of if you generate the Fees by Facility or Fees by Modality report.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **FACILITY FEE SCHEDULE** tab, click **ADD.**
4. Enter the following settings.

Setting	Description
Fee Name	Type a name for the facility fee schedule.
Start Date/End Date	Select a date range during which the schedule is valid.
Facilities	Select one or more facilities to which the schedule applies.
Modalities	Select one or more modalities to which the fee applies.
Modality Fee	Type the fee for the modality, and then click the plus ➕ button. You can add multiple modality/fee combinations.

5. Click **SAVE.**

Configure body parts

You can define body parts for use in other parts of the program.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **BODY PARTS** tab, click **ADD.**
4. Type the name and alternative name for the body part, and then click **SAVE.**

Configure diagnostic codes

You can enter SNOMED, ICD, or LOINC codes for use in other parts of the program.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **DIAGNOSTIC CODES** tab, click **ADD.**
4. Enter the following settings.
   Code – Type the code to enter.
   Description – Type the code's diagnosis description.
   Code Type – Select the code standard to which the code belongs.
5. Click **SAVE.**

Import diagnostic codes

If you obtain exported diagnostic codes, such as from the CMS or AMA, you can import them.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **DIAGNOSTIC CODES** tab, click **IMPORT**.
4. Click **Choose File**, browse for and select the file to import, and click **Open**.
5. Optional. To overwrite existing facilities, select the **Update Existing** check box.

6. Click **IMPORT**.

About procedure codes, appointment types, and appointment type procedures

A *procedure code* (or *CPT code*) is an internal code that identifies a medical procedure. You enter procedure codes in Exa PACS/RIS primarily *for purposes of billing*.

An *appointment type* is a separate entry that you associate with a procedure code *for purposes of scheduling and medical examinations* (by the front desk, radiologists, and technologists). You work with either a procedure code or an appointment type depending on which part of the program you are using. The appointment type code can be anything, but we recommend using the same code as the associated procedure code.

An appointment type must include at least one *appointment type procedure*, which is simply the original procedure code. In summary, the following example shows a procedure code and description for a hand X-ray, and two associated appointment types, one for the right hand and one for the left hand.

Procedure (Code/Description)	Appointment Types	Appt. Type Procedure
73120 RAD RADEX HAND 2 VIEWS	XR RIGHT HAND (73120)	73120 RAD RADEX HAND 2 VIEWS
	XR LEFT HAND (73120)	

When *scheduling* the exam, the scheduler uses one of the appointment types. When *reading* the exam, the radiologist also uses the appointment type. When *billing* the exam, the biller uses the procedure code.

Configure procedure codes

A *procedure code* is an internal code that identifies a medical procedure. Additionally, procedure code entries serve as detailed sets of information about procedures that Exa PACS/RIS uses for billing, ordering, and other functions.

When you configure a procedure code, you can add (associate) NDCs from which future technologists can select when performing the exam. This makes the process of searching for and adding the appropriate contrast material and other medications more efficient and accurate.

Prerequisites: For adding NDCs to a procedure code, complete the steps in "Configure NDCs."
1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **PROCEDURE CODES** tab, click **ADD**.
4. Enter the following settings.

Setting	Description
Single/Empty Code	[Unused]
Facilities	Select one or more facilities that perform the procedure.
Code	Type your code for the procedure.
Short Description	Type a short description for the procedure.
Description	Type a full description of the procedure.
Service Type	Select the service type to which the procedure belongs.

Setting	Description
Ref. Code	Type the reference code of the procedure. In most cases this can be the CPT or LOINC code.
NDC Code	Type the national drug code associated with the procedure, if any. For a more advanced NDC function, see later steps in this topic.
NDC Measure	Type the unit of measure for contrast and/or liquid medications. The value for this is usually UN.
Color Code	Click in the box, and then select a color in the picker to assign to the procedure.
SDE Study	Select the check box if the procedure is associated with echo ultrasound.

5. Click **SAVE**.
6. Optional. On the **GENERAL** sub-tab, enter the settings described below, and then click **SAVE**.

Setting	Description
Body Part	Select the body part associated with the procedure.
Non-Transcribable	Select if the procedure cannot be transcribed.
Require Copay	Select if the procedure requires a copayment.
Require Physician	Select if the procedure must be performed by a physician.
Require Waiting Time	Select if the procedure requires a waiting time before beginning (such as drinking Barium some number of hours before a procedure).
Notes	Type notes for the procedure as needed.
Duration	Type the expected duration of the procedure.
Default Units	Type the number of procedure units.
RVU	Type or select the relative value units of the procedure for Medicare reimbursement.
Level	The provider level code that determines the pay rate to the radiologist.
Modalities	Select one or more modalities used in the procedure.

7. Optional. To add NDCs to the procedure code, do the following.
    a. On the **NDC** sub-tab, click **Add**.
    b. Search for a code by entering criteria in the search boxes at the top and pressing **Enter**.
    c. Select the check boxes of the NDCs to add, and then click **SAVE**.
8. Optional. For **EXAM PREP. INSTRUCTIONS**, see "Configure exam prep instructions".
9. Optional. To add diagnostic codes (other than standard ones already on your system), on the **DIAGNOSTIC CODES** sub-tab, select codes from the list.
10. Optional. To associate a diagnostic code with the procedure code, on the **DIAGNOSTIC CODES** sub-tab, select a code.

11. Optional. To specify a report template to be used for the procedure, on the **DEFAULT REPORT TEMPLATE** sub-tab, do one of the following.
    - In the **Template** List, select an existing template.
    - Click **NEW TEMPLATE**, type a template name, create a template in the word processing area, and then click **SAVE TEMPLATE**.
12. Click **SAVE & CLOSE**.

Import specimen catalogs

If you obtain specimen catalogs in CSV format, you can import them.
1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **PROCEDURE CODES** tab, click **SPECIMEN CATALOG**.
4. Click **Choose File**, browse for and select the file to import, and click **Open**.
5. Optional. To overwrite existing facilities, select the **Update Existing** check box.
6. Click **IMPORT**.

Import procedure codes

If you obtain exported procedure (CPT) codes, such as from the AMA or third-party billing companies, you can import them.
1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **PROCEDURE CODES** tab, click **IMPORT CPT**.
4. Click **Choose File**, browse for and select the file to import, and click **Open**.
5. Optional. To overwrite existing facilities, select the **Update Existing** check box.
6. Click **IMPORT**.

Configure NDCs

You add an NDC (national drug code) for use elsewhere in the program. You add NDCs either manually or by importing them.

Add an NDC manually

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **NDC CODES** tab, click **ADD.**
4. Enter the following settings.

Setting	Description
Proprietary Name	Type the trade name, or the name of the drug chosen by the labeler.
Non Proprietary Name	Type the generic name or the active ingredient in the drug
NDC Package Code	Type the code from the manufacturer.
Package Description	Type the description of the package from the manufacturer.
Strength	Type the strength of the active ingredient, then select the units of strength in the list.
Labeler Name	Type the name of company corresponding to the labeler code segment in the Product NDC.

Setting	Description
Product NDC	Type the labeler code and product code segments of the NDC number, separated by a hyphen.
Route	Select the administration method for the drug.

5. Click **SAVE**.

Import NDCs

Hint: Click the Help button to view a list of the column names and their order.
1. Obtain a CSV file of NDCs that include the same fields in the table above.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **NDC CODES** tab, click **IMPORT.**
4. Click **Choose File**, browse for and select the CSV file, and then click **Open**.
5. Optional: To append (and not overwrite) the CSV file to existing NDCs, select the **Update Existing** check box.
6. Click **IMPORT**.

Configure schedule blocks

You can reserve blocks of time on the schedule book for modality rooms at selected facilities, and you can specify whether to be able to schedule exams during the block. Each block is given a *reason* (such as a specific patient's name), so that if scheduling is allowed, the scheduler knows what exams they can order during the block (such as ones needed by that specific patient).

To create a schedule block, you create a schedule rule within a schedule template and select the "Display as a block on schedule book" option. See "Configure a schedule template."

About schedule templates and schedule rules

A *schedule template* contains one or more schedule rules for scheduling appointments. The schedule template links to one or more appointment types and one or more modality rooms.

A *schedule rule* determines when appointment types and modality rooms can be scheduled. Think of schedule rules as the "office hours" for exams. When working in the schedule book, Exa PACS/RIS prevents you from scheduling an exam that breaks any rule you configure, such as by hiding modality rooms on specified days, or by warning you with a message.

Relationship between schedule rules and time slot availability

1. If **no rule** applies to a slot, the slot is always available
2. If an **exclusion rule** applies to a slot, the slot is not available
3. If an **inclusion rule** applies to a slot, regardless of time:
   - All other slots are unavailable
   - A priority is set for the inclusion rules in the following order: Specific date, yearly, monthly, weekly, daily.

   For example:
   - If a specific date and a daily inclusion rule apply, the specific date rule is applied and the daily rule is ignored.
   - If two equal priority rules exist (such as two daily rules), they both apply (they "stack").
   - Inclusion and exclusion rules can apply together, such as a weekly inclusion rule and a daily exclusion rule.

Configure a schedule template and schedule rules

For information on schedule templates, see "About schedule templates and schedule rules." To configure a schedule template:

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **SCHEDULE TEMPLATES** tab, click **ADD TEMPLATE**.
4. Type a name and description for the template and then click **SAVE**.
5. Under **Schedule Rules**, click **ADD**.
6. In the schedule rule screen, enter the following settings.

Setting	Description
Template Name	Select the template to which to add the schedule rule.
Rule Name	Select **Predefined** or **Free Text**, and then type or select a name for the schedule rule.
Modality Rooms Appointment Types Resource	Select a combination of these items along with dates and times to define the rule. For example, your rule could specify that: "Resource A can perform appointment type B in modality room C."
Type	Select **Repeating** if you want the schedule rule to recur, or **Date/Time** if not.
Not Available	Select **Not Available** to make the corresponding block a *hard block* (prevent overlapping by other blocks). Clear the check box to create a *soft block* (allow overlapping by other blocks).
Display as a block on schedule book	Select if this rule defines a schedule block on the schedule book. Use the color picker to assign a color.
Ignore rule in scheduling engine (use only for displaying text/color label)	This setting becomes available when you select Display as a block on schedule book. Select this **Ignore rule...** check box to display the block on the schedule book, without the program taking it into account when finding slots.
Autoblocking	If you select a technologist resource for the rule, and the technologist is available to work in two modality rooms at the same time, select Autoblocking to prevent double-booking that technologist.

7. Do one of the following
   - To save the current rule and add another rule, click **SAVE**.
   - Click **SAVE & CLOSE**.

Configure a schedule filter

You can create a filter that controls what appears in the schedule book. For example, a filter could specify to only show two modalities over four days.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **SCHEDULE FILTER** tab, click **ADD.**
4. Enter the following settings.

Setting	Description
Filter Name	Type a name for the filter.
No. of Days	Type the number of days to display on a single page of the schedule book. If the content of the page exceeds the available display width, a scroll bar appears.
Modality Display Width	Type the column width for each modality room, in numbers of pixels.
Locations	Select a facility in the list. The modality rooms at the selected facility appear in the Modality Rooms list.
Modality Rooms	Select one or more modalities in the list, and then click the right arrow ❯ button to add them to the Selected Rooms list. These are the only modality rooms that will appear in the schedule book when you apply the filter.

5. Click **SAVE.**

Configure study statuses

Workflows in Exa PACS/RIS are status-driven. To create or tailor workflows, you can create a set of study statuses, and then configure how studies move from status to status (see "Configure study flow"). To add statuses:

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **STUDY STATUS** tab, on the **STUDY STATUS** sub-tab, in the **Facility** list, select a facility, and then click **ADD.**
4. Enter the following settings.

Group	Setting	Description
General Information	Status Code	Type your internal code for the status.
	Add to Study Shortcut Menu on Worklist	Select to add the status to the study shortcut menu.
	Status Description	Type the name of the status.
	MobileRad Related	Select if the status is for MobileRad. For use with the MobileRad app.
	Color Code	Click in the box, and then select a color from the picker to color code the status.
	Order Related	Select if the status is related to orders only.
	Max Wait Time	Type the number of minutes to complete check-in. If the time is exceeded, the "Exceeds maximum time limit" count at the bottom of the worklist increments.
Things to Validate	Always Show Validation Window	Reserved for encounters.

Group	Setting	Description
	[Other check boxes]	Select the items that Exa PACS/RIS validates (checks for inclusion) before moving the study to the next status.
	Document Review	Select to require document review to advance to the next status in the study flow. Select the documents for which to require review in the list. See also "Require document review."
Notification Settings	Email/Fax Template	Select templates that determine whether and to whom notification is made when a study arrives at the status.

5. Click **SAVE.**

Configure study flow

Exa PACS/RIS provides a graphical representation of the flow of studies from status to status at each facility. You can define these flows, and also apply routing rules to control whether data can move to the next status in the flow. You do not need to apply routing rules for manual DICOM send operations. **CAUTION**: Changing the study flow incorrectly can "orphan" studies, leaving them unable to move to the next status in the workflow.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **STUDY STATUS** tab, click the **STUDY FLOW** tab.
4. In the **Facility** list, select a facility.
5. The flow diagram appears, with arrows indicating the direction of flow.
6. To add a flow, drag the orange bar in a node to another node.
7. To add a routing rule to a flow, click the triangle on an arrow connecting status nodes, select a routing rule, and then click **OK**.
8. Click **SAVE.**

Add a transcription template

You can add a template for use during transcription. A *transcription template* is for streamlining transcription, whereas a *report template* is for final formatting of approved reports.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **TRANSCRIPTION TEMPLATE** tab, click **ADD.**
4. Enter the following settings.

Setting	Description
Template Name	Type a name for the template.
Global	Select to make the template available to all users.
Macro Keyword	Type a macro keywords that can be voice-recognized to open a template.
User	You can restrict availability of the template by assigning users to it. Select a user in the list and then click the plus ➕ button. You can assign the template to multiple users.

Setting	Description
Appointment Types	Restricts availability of the template to studies of the selected CPT code.
Require ALL Match	Restricts availability of the template to users and studies who match all criteria entered in these settings.
Facilities	Select one or more facilities to which to assign the template.
Modality	Restricts availability of the template for use with one or more modalities.
Body Part	Restricts availability to the template for use with one or more body parts.
Study Description	Restricts availability of the template to studies with the entered study description.
Institution	Select one or more institution to which to assign the template.

5. Click **SAVE.**
6. In the template editor, type and format text for the template, and then click **SAVE & CLOSE**.
7. Optional. To paste items onto the template that you copied from outside of Exa PACS/RIS, on the **HOME** tab, click **Paste**, and then in the button shortcut menu, click **Paste**.

About report templates

A *report template* is for final formatting of approved reports, whereas a *transcription template* is for streamlining transcription. You can create report templates and enhance them with logos, tables, and merge fields. When you prepare a report based on your template, Exa PACS/RIS substitutes merge fields with study and patient information.

Add a report template

Add a report template by following the steps below, and then continue to the next procedure to edit the header or footer.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **REPORT TEMPLATE** tab, do one of the following.
   - To base the new template on an existing one, click the copy 🖺 button of the existing template.
   - To start a new template from scratch, click **ADD**.

Setting	Description
Template Name	Type a name for the template.
Market	Optional. Select the market to associate with the template. All facilities in the selected market become selected in the Facilities field below.
Facilities	Select all facilities that use the template.
Institution	Select institutions that use the template.
Modality	Select all modalities to which the template can apply.

Setting	Description
Summary	Type explanatory information about the template.
Study Description	Type study descriptions for the templates to be applied. For example, US Abdomen could have a different template than MRI Abdomen.

4. Click **SAVE**.
5. Follow the procedures below as needed.

Configure the header and footer of a report template

You can configure the header and footer of a report template, or edit existing ones.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **REPORT TEMPLATE** tab, double-click a template.
4. At the bottom of the page, click the **PAGE HEADER/FOOTER** sub-tab.
5. The word processor appears (it may take a few moments).
6. On the **INSERT** tab, click Header, and then in the button shortcut menu, click **Edit Header**.
7. Type information for the header.
8. Perform similar steps to add a footer.
9. Optional. To add logos, merge fields, and other design elements, see topics below.
10. Click **SAVE.**

Configure a report template signature

You can configure a standardized signature on your report templates to add to reports.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **REPORT TEMPLATE** tab, double-click a template.
4. At the bottom of the page, click the **REPORT SIGNATURE** sub-tab.
5. Type information for the signature.
6. Optional. To add merge fields, see "Add merge fields."
7. Click **SAVE**.

Add a logo

1. Prepare a bitmap image and save it in the following folder.
   [drive]:/EXA/WebImages
2. Place the cursor in the header or footer where you want to place the logo.
   Note: It may be helpful to add carriage returns to make room for the logo.
3. On the **INSERT** tab, click **Image**, and then in the button shortcut menu, click **Image**.
4. In the **Open File** dialog box, type the name of the bitmap image and then click **Open**.
5. In the image shortcut menu, click **Format**.
6. In the **Image Attributes** dialog box, under Wrapping Style, click **In Line**, and then click **OK**.
7. Optional. On the **HOME** tab, click the text alignment tools, or drag the image to position it.
8. Click **Save**.

Add a table

1. On the **INSERT** tab, click **Table**.
2. In the **Insert Table** dialog box, enter table settings and then click **OK**.
3. Type information in the table as needed.
4. Optional. Add merge fields to the table.
5. Click **Save**.

Add merge fields

1. Place the cursor in the header or footer where you want to add the merge field.
2. On the **REPORTS** tab, click **Merge Field**.
3. On the **Merge Field** button shortcut menu, point to a category, and the select a field in the submenu.
4. Click **Save**.

Configure functional and cognitive statuses

Functional and cognitive statuses are preset descriptions of a patient's level of physical and mental functioning that can be used in other parts of the program.

1. On the burger menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **FUNCTIONAL STATUS** tab, in the **Description** box, type a functional status and then click **SAVE.**
4. On the **COGNITIVE STATUS** tab, in the **Description** box, type a cognitive status and then click **SAVE.**

What are lead time and expected arrival time?

The *lead time* is the number of minutes prior to the appointment time that the scheduler wants the patient to arrive. The program calculates an expected patient arrival date and time (the *expected arrival time*) by subtracting the lead time from the appointment time. The scheduler may find it convenient to inform the patient of this expected arrival time rather than the formal start time of the appointment.

If an appointment contains multiple exams, the program calculates the expected arrival time based on the lead time of the first exam. If the first exam has no lead time, it uses that of the second exam, and so on. If no exams have lead times, the expected arrival time is simply the time of the first exam.

Configure appointment types

An appointment type defines a set of procedures to perform during an exam. You can configure appointment types for use in scheduling and other parts of the program.

1. On the burger menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. On the **APPOINTMENT TYPES** tab, click **ADD.**
4. Enter the following settings.

Setting	Description
Code	Type your internal code for the appointment type.
Ref. Code	Type the reference code.
Name	Type a name for the appointment type.
Description	Type a description for the appointment type.
Duration	Type the expected duration of the appointment type.
Additional Time	Type the number of additional time needed beyond the default duration.
Lead Time	Type the number of minutes to arrive before the exam begins.
Exam Count	Type the number of exams to be included.

Setting	Description
Grouped Appointment	Select for grouped appointments (see "Configure grouped appointments").
Facilities	Select one or more facilities where the appointment type is available.
Modality	Select one or more modalities to use for the appointment type.
Modality Room	Select one or more modality rooms where the appointment type can be scheduled.
Keywords	To make the appointment type easier to find during scheduling, type a keyword and click the plus button. Add as many keywords as needed.

5. On the **APPOINTMENT TYPE PROCEDURES** sub-tab, click **ADD.**
6. In the **Appointment Procedure** dialog box, select a procedure and any applicable modifiers, and then click **SAVE.**
7. On the **EXAM PREP/ROOM LEVEL CONFIG** sub-tab, add or edit exam prep instructions as needed. See "Configure exam prep instructions."
8. Click **SAVE.**

Configure exam prep instructions

For each appointment type you can assign exam and room preparation instructions. The instructions are linked to modality rooms so that if an exam is rescheduled to a different room, the instructions change accordingly. To configure exam prep instructions, start by following the procedure in "Configure appointment types," and then:

1. On the **Setup** > **Scheduling and Codes**, open a type to edit.
2. On the **EXAM PREP/ROOM LEVEL CONFIG** sub-tab, click **ADD**, and then enter the following settings.

Setting	Description
Modality Room	Select the modality room to which to apply the prep instructions.
Duration	Type the estimated duration of the exam.
Additional Time	Type the number of additional time needed beyond the default duration.
Lead Time	Type the number of minutes to arrive before the exam begins.
Prep Instructions	Type the exam and room preparation instructions.

3. Click **SAVE**.

Configure grouped appointments

A *grouped appointment* is an appointment type that contains more than one billable procedure. Grouped appointments make it easy to schedule more than one procedure or exam to perform during a single patient appointment. To configure a grouped appointment:

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Scheduling & Codes**.
3. On the **APPOINTMENT TYPES** tab, click **ADD.**

4. Select the **Grouped Appointments** check box.
5. Enter the following settings.

Setting	Description
Code	Type a unique code for the grouped appointment. The code does not need to match an existing procedure code.
Ref. Code	Type the reference code, if any.
Name	Type a name for the grouped appointment type.
Description	Type a description for the appointment type (it can be the same as the name).
Duration	Type the total expected duration of all procedures in the grouped appointment.
Lead Time	(Will be determined automatically)
Exam Count	Type the number of procedures to be included.
Grouped Appointment	(Already selected).
Facilities	Select one or more facilities where the appointment type is available.
Keywords	To make the appointment type easier to find during scheduling, type a keyword and then click the plus button. Add as many keywords as needed.

6. Click **SAVE**, and then in the message box, click **YES**.
7. In the **Appointment Types** dialog box, in the **Appointment Type** list, select an appointment type to add to the grouped appointment.
8. Optional. In the **Minutes to wait after exam** box, type the expected minutes the patient must wait between appointment types.
9. Click **SAVE**, and then in the message box, click **YES**.
10. Repeat steps 6–8 until all appointment types are added to the grouped appointment.
11. On the **APPOINTMENT TYPES** tab, click **SAVE**.

View locked slots

Exa PACS/RIS "locks" timeslots as soon as a scheduler selects them. The prevents other schedulers from simultaneously double-booking in the same slot. You can view which slots are currently locked with the following steps.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Scheduling & Codes**.
3. Select the **LOCKED SLOTS** tab.

Configure DICOM settings

You can configure DICOM settings such as by configuring AEs, setting up file stores, and defining receiver and routing rules.

Note: The default AE title for Exa PACS/RIS is EXA_SCP, or EXA_MWL when acting as a worklist source. These titles are configured elsewhere in the program by a Konica Minolta installation engineer.

Configure application entities

In Exa PACS/RIS, an *application entity* (*AE*) *title* is a named configuration for a DICOM application that includes information such as its type, host machine, and port number. You must set up AE titles for Modality Worklist, send, receive/store, print, query/retrieve, and other functions to make them available on Exa PACS/RIS. To configure an AE, use the following procedure and then continue to "Configure a DICOM printer."

Failure to correctly configure application entities can cause general failure of DICOM communication between Exa PACS/RIS and those entities.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **DICOM**.
3. On the **AE TITLE** tab, click **ADD.**
4. Enter the following settings, and then click **SAVE.**
   Note: Depending on the AE type, not all of the following settings are available.

Setting	Description
AE Type	Select one or more transactions that Exa PACS/RIS makes with the AE.
AE Title (Remote)	Type the title of the AE. If an AE title is pre-configured on the device hosting the AE, use the same title.
Ignore Scan Docs (Send)	Select to prevent sending of scanned documents to the AE (only DICOM studies are sent).
My AE Title	Type a title to set the identity of Exa PACS/RIS individually for each DICOM node. In most cases, leave blank to use the default (EXA_SCP for PACS/RIS functions, and EXA_MWL for modality worklist functions).
Host Name	Type the host name or IP address of the AE.
Description	Type a description for easy identification of the AE.
Disable QC2LIVE	Select to disable the automatic transfer of studies from QC to live.
Retries	Type the number of times the system attempts to reconnect with the AE after a communication failure.
Send Single Instance per Study	Select to send one image per study.
Max Concurrent	Type the maximum number of concurrent threads that the system can use for the transaction.
Facility	Select the facility to associate with the AE.
Send Annotations as	Select how to process annotations for sending. **Burned in**: "Flattens" the image and overlay into a single image. **DICOM Overlay**: Converts the annotations to a DICOM overlay and sends along with the study.

Setting	Description
	GSPS/PR Object: Converts the annotations to a presentation state and sends along with the study.
Send Unique Image UID from Viewer	Select to generate a new UID for each image (rather than just for the series or study).
DMWL Modalities	Select to which modalities to serve a modality worklist.
DMWL Facilities	Select to which facility to serve a modality worklist.
Issuer Type	Select the type of issuer of PID: **None** - DICOM receive and query/retrieve takes place as if no issuer was configured. **Static** - Select a pre-configured issuer (see "Issuer" below). **Dynamic** - Automatically define the issuer based on retrieved results, and allow multiple issuer/alternate ID combinations.
Issuer	When you select an issuer type of **Static**, select the entity that issues the patient's PID, MRN, or account number. This enables tracking and correct assignment of account numbers for sending and receiving studies when more than one are available.
AE Flag	Select one of the following services to use to send studies. **DICOM**: C-MOVE **DICOM SSL**: C-MOVE, secured **HL7**: Standard HL7 protocols. **OPAL**: The Opal Transfer service.
Institution	Type the name of the institution for easier identification.
File Store	Select a file store for storing received data.
Port	Type the port number through which the AE can connect to Exa PACS/RIS (the Exa PACS/RIS listening port).
Require SSL	Select this check box if: 1) you selected the **DICOM SSL** AE flag; and 2) the port number requires an SSL certificate.
Transfer Syntax (Send)	Select the transfer syntax for sending.
Transfer Syntax (Receive)	Select the transfer syntax for storing and receiving.
Vehicle	Select vehicles to which to assign received studies.
SDE Modality	Select if the AE is a dedicated echo ultrasound.
Include Approved Reports	Select to include approved reports in transactions.

Configure a DICOM printer

Configure and save AE with AE type of "Print," and then perform the following procedure.

1. On the **AE TITLE** tab, double-click your printer.
2. Under **Extra Printer Options**, enter the following settings.

Setting	Description
ARTIM Timeout	Type the number of minutes to wait for an acceptance or rejection response to an association request before timing out.
Read Timeout	Type the number of minutes the printer waits to receive data before timing out.
Write Timeout	Type the number of minutes the printer waits to send data before timing out.
Max PDU Length	Type the maximum number of bytes of a protocol data unit that the printer can receive.
Border Margins	[Unused]
True Size	[Unused]

3. Open the printer AE that you just configured.
4. Click **ADD CONFIGURATION**.
5. In the **Configuration** dialog box, enter the following settings.

Setting	Description
Name	Type a name for the printer.
Medium	Select the printer medium.
Film Size	Select the film size for the printer.
Border Density	Select a border density of Black or White.
Memory Allocation (KB)	For most printers, accept the default of **Auto**. Otherwise, type the amount of memory in kilobytes to allocate for a print session.
Film Destination	Select the destination for exposed film.
Film Orientation	Select the orientation of the film.
Magnification	Select a magnification factor for printing images.
Empty Density	Select the density of the image box area on the film that contains no image.

6. Click **SAVE**.

Configure a file store

File stores are directories on servers that Exa PACS/RIS uses to store files received in a DICOM transaction, such as images from a modality.

CAUTION: Changing an existing file store can prevent the study from opening.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **DICOM**.
3. On the **FILE STORE** tab, click **ADD.**
4. Type the server name, root directory, and notes, and then click **SAVE.**

Configure routing rules

With routing rules, you can define how certain types of data flow between Exa PACS/RIS and other AEs. For example, you could create a routing rule that tells Exa PACS/RIS to automatically send all data that it receives from ultrasound modalities to another PACS. You can also add criteria to your rule for more precise control. For example, you could specify to only send ultrasound data coming from a specific facility.

Use the following procedure to configure a routing rule, and then apply the rule by following the steps in "Configure study flow." It is not necessary to apply routing rules for manual DICOM send operations.

1. On the burger 🍔 menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **DICOM**.
3. On the **ROUTING RULES** tab, click **ADD.**
4. Enter the following settings. Not all settings are available depending on the type you select.

Setting	Description
Rule Name	Type a name for the rule.
Type	Select the transaction to perform with the AE (for example, SEND).
Interface/Trigger Name	Select an interface and/or trigger for HL7 send actions.
AE Title	Select the AE with which to perform the transaction (for example, select Remote_Hospital to send to that AE).
Priority	Type a number to indicate which rules to evaluate first. Lower numbers take higher priority. Refer to your current list of rules on the ROUTING RULES tab to determine the priority to use for the rule you are adding.
Attempts	Type the number of attempts the program should make to apply the rule.
Priors	Type the number of priors to retrieve. Type 0 (zero) to specify all priors.
Modality	Select an option to filter which priors to retrieve.
Number of Priors to Send	Type the number of priors to send along with the study.
Auto Send Priors	Select to send any priors found in the system along with the current study, and to enable functionality of the Relevant Priors check box. • The system sends as many priors as it can find, up to the number you specify above. • The system sends the most recent priors first.
Relevant Priors	Select to send relevant priors when auto-sending, and then enter criteria to define what is relevant. Selecting this check box enables the functionality of the Force Relevant Only check box below. • If you do not specify criteria, the system considers relevant priors to be studies of the same modality and/or body part.

Setting	Description
	• The system sends as many relevant priors as it can find, up to the number you specify above. • If the system finds fewer relevant priors than the number specified, it adds non-relevant priors up to the number specified.
Force Relevant Only	Select to prevent sending of non-relevant priors. • If the system finds fewer relevant priors than the number specified above, it does not send any additional priors.

5. Optional. Configure a criterion for the rule:
6. In the **Field** list, select an argument
   For example, *Modality*.
7. In the entry field that appears, select a matching value for the argument.
   For example, in the *Modality* list, select *MG*.
8. Click **ADD TO RULES**.
   Result: In this example, when Exa PACS/RIS receives an MG study, it automatically sends it to the AE named Remote_Hospital.
9. Optional. Add more criteria.
10. Click **SAVE.**

Configure AE scripts

You can write scripts that modify DICOM tags when carrying out a DICOM-related transaction such as sending, printing, or receiving.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **DICOM**.
3. On the **AE SCRIPTS** tab, click **ADD.**
4. Enter the following settings.

Setting	Description
AE Type AE Title	Select a transaction and node. The script runs when Exa makes the selected transaction with the selected node.
All	Select all AEs of the selected AE Type.
Script Description	Type a description of the script.
Asynchronous	Select to run the script asynchronously.

5. In the **Script** area, type the script to run when the previous conditions are true.
   Note: For syntax, click the help ? button.
6. Click **COMPILE**, and correct any errors that occur.
7. When the script is free of errors, click **SAVE.**

Understanding receiver rules

A *receiver rule* is a detailed set of criteria and instructions that tells Exa PACS/RIS where to place studies that it receives, and what status to assign them. For example, you can configure a receiver rule such that studies with unrecognized account numbers are placed on the QC tab to await reconciliation by the user before going live.

Note: Receiver rules also have an important role in accelerating the processing of incoming data. Exa PACS/RIS processes each receiver rule in order on a given machine. Therefore, to improve speed, you can apply different rules on different machines.

To understand how receiver rules are evaluated and applied, it is helpful to imagine a 4-step process that Exa PACS/RIS performs for each incoming study.

Find a receiver rule that matches the study.
Validate the study against existing PACS studies and/or match it to existing RIS orders.
Process the successes (studies that passed validation and/or matched orders).
Process the failures (studies that failed validation or did not match an order).

A detailed explanation of each of these steps follows.

Step 1 – Find a matching receiver rule

When Exa PACS/RIS receives a DICOM study, it evaluates the study against each receiver rule on the RECEIVER RULES tab in order of "Priority" (starting from the top) until it finds one that matches.

From top…   …to bottom

If no user-defined rule matches, Exa PACS/RIS uses a "default" rule that has a minimum number of criteria to ensure that all legitimate studies match at least one rule. (If a study did not match any rule, Exa PACS/RIS would not receive it.)

To evaluate whether a study matches a rule, Exa PACS/RIS compares the settings you enter under **Rule Info and Filter** (in the green box in the figure below) to the information in the study. If all relevant criteria match, the rule becomes active, and the process continues to step 2.

Rule info and Filter

Rule Name *	[ ] ☐ Inactive
AE Title	All ▼
Facility	All ▼
Modality	All ▼
Institution	[ ]
Status	Unread ▼
Interval (Sec) *	120
Trigger RoutingRules	☐

Step 2 – Validate and match against PACS and/or RIS

A "rule" is actually not a single rule, but rather a combination of the "Rule Info and Filter" above, plus one of four possible preset "Applied Rules," such as in the figure below.

Applied Rules

- Reconciliation Mode: Pacs only site
- Emit Live Update
- Precache Study
- Precache Priors
- No. of. priors: **3**
- Pick study description from DICOM
- Patient
  - Account #/Dicom Patient ID
  - Last name
  - Date of Birth
  - Move Anyway (Even in exception)
  - Move to live when there is no-match
- Study
  - Study UID
  - Move to live when there is no-match

Figure: Applied rules in the PACS ONLY preset.

Exa PACS/RIS compares the items in the green boxes from the incoming study against PACS, RIS, or both, depending on the reconciliation mode (the first bullet item in the figure). The items under Patient (such as "Last name" in the figure) and Study ("Study UID") must match a patient in PACS and/or a RIS order. Exa PACS/RIS stores the result of the match (success or failure) in this step, and then evaluation continues to step 3 or 4.

Step 3 – Process successes

If matching succeeded, Exa PACS/RIS waits the number of seconds specified in the **Interval** setting from step 1, moves the study from the QC tab to the ALL STUDIES tab (the study "goes live"), and assigns to the study the status selected in the **Status** list from step 1. At the same time, it performs the actions and applies the options in the blue box below.

Applied Rules

- Reconciliation Mode: Pacs only site
- Emit Live Update
- Precache Study
- Precache Priors
- No. of. priors: **3**
- Pick study description from DICOM
  - Patient
    - Account #/Dicom Patient ID
    - Last name
    - Date of Birth
    - Move Anyway (Even in exception)
    - Move to live when there is no-match
  - Study
    - Study UID
    - Move to live when there is no-match

Step 4 – Process failures

If matching failed, the study initially remains on the QC tab with a status of *Conflicts* to await reconciliation by the user. However, there is one more set of evaluations left to make, based on the items in the orange boxes in the figure below.

Applied Rules

- Reconciliation Mode: Pacs only site
- Emit Live Update
- Precache Study
- Precache Priors
- No. of. priors: **3**
- Pick study description from DICOM
- Patient
  - Account #/Dicom Patient ID
  - Last name
  - Date of Birth
  - Move Anyway (Even in exception)
  - Move to live when there is no-match
- Study
  - Study UID
  - Move to live when there is no-match

If any of these items are present, the study status is set to *Completed* in the QC tab. Additionally, each item results in the following.

Move Anyway (Even in exception)

If duplicate matching demographics are found, or if at least one matching criterion fails, the study also appears on the ALL STUDIES tab with a status of "FIX_."

Patient: Move to live when there is no-match
The study moves to the ALL STUDIES tab even if patient demographic validation fails. Generally, this is used only when no modality worklist is available.

Study: Move to live when there is no-match
The study moves to the ALL STUDIES tab, even if no matching order is found.

> **Note**: If "Move to live when there is no-match" is present both under Patient and Study, Exa PACS/RIS processes the study as a success.

Configure a receiver rule

You can configure receiver rules to tell Exa PACS/RIS where to place studies that it receives, and what status to assign to them. For more information, see "Understanding receiver rules."

1. On the burger 🍔 menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **DICOM**.
3. On the **RECEIVER RULES** tab, click **ADD.**
4. Under **Rule Information and Filter**, enter the following settings as needed.

Setting	Description
Rule Name	Type a name for the rule.
AE Title	Use these settings as filtering criteria. For example, to evaluate the rule only against mammography studies, on the Modality list, select MG. To evaluate the rule only if the study comes from a specific AE, select one under **AE Title**.
Facility	
Modality	
Institution	
Status	Select the status to assign the study if it matches the rule.
Interval	Select a number of seconds to wait before moving the study from the QC tab to the ALL STUDIES tab (go live).
Trigger Routing Rules	Select to force evaluation of matching studies against routing rules.
Issuer of Alternate Account Number	Select to enable alternate account functionality. See "Use alternate account numbers."

5. Click one of the following preset buttons to assign a reconciliation mode and to add "applied rules" (matching criteria and actions to perform) to your receiver rule.

Preset Button	Reconciliation Mode	Description
PACS ONLY	PACS	Validate patient and study items against existing PACS records.
PACS/RIS	PACS + RIS	Validate patient and study items against existing PACS records and/or RIS orders.
PACS/DMWL	PACS + RIS	--same--
MIGRATION	PACS	Use when migrating data from another PACS. Allows everything to be received.

6. Click **SAVE.**

Configure matching rules
See "Work with Display Management."

Configure hanging protocols
See "Work with Display Management."

Manage jobs in the transfer queue
DICOM studies that you send appear as jobs in the transfer queue. You can view and change job status and priority, cancel jobs, and requeue failed jobs.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **DICOM**.
3. On the **TRANSFER QUEUE** tab, perform any of the following tasks.

View job status

In the list of jobs, the status is listed in the CURRENT STATUS column. The available statuses are as follows.

Queued	Processing not yet started.
In-progress	Sending of data has started but not finished.
Completed	Sending of all data is finished.
Canceled	Sending of data canceled by the user. You can only cancel a job with a status of Queued.
Error	Sending was aborted due to failed association or the request was rejected by the destination.

View demographics

To view the demographics of a study in the transfer queue, click the expand ✚ button.

Change the job priority

To change the priority of a job, click the ✎ edit button, select a new priority, and then click **SAVE.**

View job details

To view demographics and other queue details, click the view ▤ button.

Cancel a job

To cancel a job, click the cancel ⊘ button.

Requeue a job

To *requeue* a job means to repeat or retry sending. If the status of a job is Queued, Error, Completed, or Cancelled, you can requeue the job by clicking the requeue ↱ button. Requeued jobs remain in the transfer queue for 15 minutes before reprocessing begins.

Reprocess non-failed jobs

Rather than requeuing jobs one at a time, you can select multiple jobs for reprocessing, and then click REPROCESS SELECTED.

Reprocess failed jobs

Failed jobs are ones with a status of "Error." You can select a range of failed jobs (such as by filtering the worklist) and reprocess them all at once.

1. On the transfer queue, click **REPROCESS FAILED**.
2. In the date boxes, enter a date range of jobs to reprocess.
   Note: To select all dates, leave the boxes blank.
3. In the AE Title list, select the AE whose jobs you want to reprocess.
4. Click **REPROCESS**.

Reprint DICOM Print jobs

1. On the transfer queue, find a job with type **PRINT** and status **Completed**.
2. Right-click the job, and click **REPRINT**.

Cancel a DICOM Print job

1. On the transfer queue, find a job with type **PRINT** and status **Queued**.
2. Right-click the job, and click **Cancel**.

Configure an issuer of a PID

See "Use alternate account numbers."

Configure billing

Exa Billing uses patient and insurance information that you entered in other Exa PACS/RIS modules, but you must also enter other information directly into Exa Billing such as codes, statuses, templates, providers, and validation rules.

Configure columns on the Studies and Claims screens

You can show, hide, and reorder columns on the Studies and Claims screens. You can also configure how the studies and claims lists are sorted by selecting default columns and specifying their default sort orders.

1. On the burger menu, click **Billing**.
2. On the top navigation bar, click **Studies** or **Claims**.
3. On the toolbar, click the settings button.
4. In the **User Settings** dialog box, under **Column Order**, do one or more of the following.
   - To show or hide a column, select or clear its check box.
   - To reorder a column, drag it to a new position in the list.
5. Under **Settings**, select a default column and its default sort order.
6. Click **SAVE.**

Adding codes and other basic data

Use this procedure to add or edit: adjustment codes, billing codes, billing classes, claim statuses, billing providers, provider ID code qualifiers, billing messages, payment reasons, CAS group codes, CAS reason codes, and status color codes. See other topics for: billing validations, EDI/ERA templates, EDI clearinghouses, insurance mapping, and printer templates.

1. On the burger menu, click **Billing**.
2. On the top navigation bar, click **Setup** > **Adjustment Codes**.
3. In the left pane, select the type of data that you want to add.
4. In the upper-right side of the page, click **ADD.**
5. Enter the information in the dialog box, and then click **SAVE.**

Configure the billing collections process

You can configure Exa PACS/RIS to automatically assign collection review status to claims meeting criteria that you enter. You can also automatically write off the balances of claims in collections.

1. On the burger menu, click **Billing**.

2. On the top navigation bar, click **Setup** > **Collections Process**.
3. On the **COLLECTIONS PROCESS** screen, enter the following settings.

Setting	Description
Process Collections Automatically	Select to turn on automatic collections processing.
Minimum Account Balance	Type a dollar amount. If the claim balance is lower than the amount you type, it will not be processed for collections.
Collections Review Criteria	Select one or more criteria, and then type the values in the boxes.
Write off the balance when there is a claim status in Claim in Collections	Select to automatically write off the balance of claims that are in the Claim in Collections status.
Debit/Credit adjustment Code	When writing off balances, select a debit or credit adjustment code to use for the write-off.

4. Click **SAVE**.

Configure claim validation

Exa Billing validates claims by confirming that the information satisfies the requirements of various public and private health agencies (if applicable), and by checking whether you entered information in required fields. You can select which fields are required.

1. On the burger ▤ menu, click **Billing**.
2. On the top navigation bar, click **Setup** > **Billing Validations**.
3. On the top of the billing validations page, select a billing method of **Electronic**, **Invoice**, or **Patient**.
4. In the list of fields, select the ones that you want to be required.
5. Click **SAVE**.

Configure a billing provider

A *billing provider* is the provider who issues invoices for an exam. In order to create claims, you must configure at least one billing provider.

1. On the burger ▤ menu, click **Billing**.
2. On the top navigation bar, click **Setup** > **Billing Providers**, and then click **ADD**.
3. Enter information as needed, and then click **SAVE**.

Create or edit an EDI or ERA template

You can create or edit an EDI template to format electronic claims submissions. You can also edit the ERA template.

1. On the burger ▤ menu, click **Billing**.
2. On the top navigation bar, click **Setup** > **EDI/ERA Templates**.
3. On the top of the page, click **EDI Template**, and then click **ADD.**
4. In the **Template Creation** dialog box, type a name for the template and then click **SAVE TEMPLATE**.
5. Below the **EDI Template** button, in the template button menu, click your template.
6. In the template editing area, edit the template.
7. To edit the ERA template, click the **ERA Template** button and then edit the template as needed.
8. Click **SAVE.**

Add billing messages

You can associate customized messages with accounts receivable codes. Billing messages print on the patient statement based on the age of the oldest claim included in the activity.

1. On the burger ☰ menu, click **Billing**.
2. On the top navigation bar, click **Setup** > **Billing Messages**.
3. To find a code, enter a criterion in the **CODE** box and then press **Enter**.
4. In the list of codes, double-click a row, enter a description, and then click **SAVE.**

Add an insurance provider

Before you can bill an insurance provider, you must set the provider up in Exa PACS/RIS. Note that *insurance provider* in this context means any institution that can act as a payer, including insurance companies, financial firms, and attorneys.

1. On the burger ☰ menu, click **SETUP**.
2. Click the word in all caps, and then click **Billing**.
3. On the **INSURANCE PROVIDER** tab, click **ADD.**
4. Enter the following information for the provider

Setting	Description
Code	Type your internal code for the provider.
Inactive	Select this check box to: 1. Make the insurance provider unavailable in other parts of the program. 2. Make all associated patient insurance profiles unavailable in other parts of the program. 3. Set the insurance profile **Valid To** date to yesterday's date.
Insurance Name	Type the name of the provider.
Payer ID	Type your internal payer ID (an ID you create based on information from your clearinghouse)
[Address]	Type the address of the provider.
Phone/Fax No.	Type the primary phone and fax numbers of the provider.
Additional Phone Numbers	Type additional phone numbers, if available.
Market	Select the market that the insurance provider serves. All facilities associated with the selected market become selected in the Facilities field below.
Facilities	Select the facilities where you see patients with this insurance provider.
Provider Type	Select a provider type. See "Add an insurance provider payer type."
SOP Payer	Select a source of payment code for the provider.
Fee Schedule	Select the default billing fee schedule used for the provider. See also "Configure a fee schedule."

Setting	Description
Allowed Fee Schedule	Select the allowed fee schedule for the provider. See also "Configure a fee schedule."
Trading Partner ID	Type the PokitDok trading partner ID. PokitDok is the default eligibility verification service. You can find the trading partner ID at: https://dashboard.pokitdok.com/#/trading-partners?code=270&name=Eligibility
Website	Type the URL to the provider's website, if available.
Insurance Provider Alerts	Type alerts as needed.

5. Click **SAVE**.

Import an insurance provider

If you obtain exported insurance provider files, you can import them.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Billing**.
3. On the **INSURANCE PROVIDER** tab, click **IMPORT**.
4. Click **Choose File**, browse for and select the file to import, and click **Open**.
5. Optional. To overwrite existing facilities, select the **Update Existing** check box.

Add an insurance provider payer type

You can create insurance provider payer types.

1. On the burger ☰ menu, click **SETUP**.
2. Click the word in all caps, and then click **Billing**.
3. On the **INSURANCE PROVIDER PAYER TYPES** tab, click **ADD.**
4. Enter your internal code and description, and then click **SAVE**.

Add a provider level code

You can create provider level codes to associate with Procedure Codes.

1. On the burger ☰ menu, click **SETUP**.
2. Click the word in all caps, and then click **Billing**.
3. On the **PROVIDER LEVEL CODE** tab, click **ADD.**
4. Enter your internal code, description, and level, and then click **SAVE**.

Add a POS map

You can create a POS (place of service) map, primarily for use in mobile radiology workflow.

1. On the burger ☰ menu, click **SETUP**.
2. Click the word in all caps, and then click **Billing**.
3. On the **POS MAP** tab, click **ADD.**
4. Enter your internal code, name, POS code, POS address, and Mobile Rad dispatching address, and then click **SAVE**.

Insurance mapping

Insurance mapping means to assign a billing method (such as direct, paper, or electronic) and a clearinghouse (for electronic billing) to an insurance provider or other payer.
Prerequisite: Add an insurance provider (see "Add an insurance provider").

1. On the burger ☰ menu, click **Billing**.
2. On the top navigation bar, click **Setup** > **Insurance Mapping**.

3. Double-click an insurance provider in the list.
4. In the **Billing Method** list, select an item, and then enter information as needed in the other fields.
   Note: For electronic billing, you must enter a clearinghouse.
5. Click **SAVE.**

Create a printer template

Exa Billing comes with templates for standard billing forms, but you can also create custom templates.

1. On the burger [image] menu, click **Billing**.
2. On the top navigation bar, click **Setup** > **Printer Templates**.
3. At the upper-right, click **ADD.**
4. Optional: To base your template on the default, click **RELOAD DEFAULT TEMPLATE**.
5. Enter the name, template type, and margins.
6. In the **Template Definition** area, type the JSON code for the template.
   A preview of your template appears in the right pane.
7. Click **SAVE.**

Select default printer templates

You can select which templates to use by default for printing out standardized forms and customized invoices. Exa Billing comes with several templates, and you can also create your own (see "Create a printer template").

1. On the burger [image] menu, click **Billing**.
2. On the **Studies** or **Claims** tab, on the toolbar, click the settings [image] button.
3. In the **User Settings** dialog box, under **Printer Template**, make the following selections.
   Paper Claim (B&W) – The standard "black and white" claims form.
   Paper Claim (RED) – The standard "red" claim form.
   Direct Invoice – Select a template for billing insurance companies.
   Patient Invoice – Select a template for billing patients.
4. Click **SAVE.**

Manage users

Administrators can configure individual users, user groups, Active Directory, and assign roles (rights) to users. In Exa PACS/RIS, you assign user roles to user groups, and then you assign user groups to individual users.

[image]

Incorrect user configuration can lead to security risks such as leaked patient information.

Create a user role

A *user role* is a named collection of user rights that you can assign to user groups. To create a user role, complete the following steps.

1. On the burger [image] menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **USER ROLES** tab, click **ADD**, type a name and description of the role, and the click **SAVE.**
   For example, type BILLING, and then click **SAVE**.
4. In the **User Role Permission** area, select all of the rights that you want to include in the user role.
5. Click **SAVE & CLOSE**.

Create a user group

A *user group* is a named collection of individual users to which you can assign roles and access to certain document types and areas of the program.

Prerequisite: Create a user role.

1. On the burger ▤ menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **USER GROUPS** tab, click **ADD**, and then enter the following settings.

Setting	Description
Group Code	Type your internal code for the group. For example, RAD.
Group Name	Type your internal name for the group. For example, Radiologist.
Group Description	Type a description for the group.
Document Types	Select the document types that group members can access. For example, select **All Documents**.
Roles	Select all user roles that you want the group members to have.
Navigation	Select the areas of the program that group members can access (items available on the burger menu).

4. Click **SAVE**.

Create a user

A *user* is a member of a user group, for whom you can configure custom rights and limitations in addition to those defined in user roles.

Prerequisite: Configure a user group.

1. On the burger ▤ menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **USERS** tab, click **ADD**, and the enter the following settings.

Setting	Description
Group Name	Select the user group to which the user belongs.
Name	Type the user's name.
Mobile Phone E-Mail	Type the user's mobile phone number and/or email address. The email address is required for two-factor authentication.
User Name	Type a sign-in user name for the user.
Login with Google	When selected, the user can sign in through their Google account.
Password	Type a sign in password for the user. This field is only available the first time you configure the user.
Session Interval	Type or select the number of minutes before the user's session times out.
Allow Emergency Access	Select to grant "super user" rights to the user regardless of roles or groups.

Setting	Description
Linked Ordering Facility	This list becomes available when you select Ordering Facility in the Linked Provider User Type list. Select ordering facilities to which to link the user.
Access Expires After	Type and select a duration after which the user's account expires. Leave blank to keep the account open indefinitely.
One-Time Access	When selected, the user can sign in only one time.
User Must Change Password Next Login	Select to force the user to create their own unique password after logging on the first time.
Assign Claims to Follow-Up Queue for Another User	Select to give the user the ability to add claims to another user's follow-up queue.
User Can Change Accounting Dates	When selected, the user can edit accounting dates under Billing > Payments.
Dragon 360	Select to make Dragon available to the user.
Market	Select the market that the user serves. This setting narrows search results in other parts of the program. For example, when the user searches for a patient chart, Exa PACS/RIS only returns charts of patients in the same market as the user.
Facilities	Select the facilities that the user can view and modify.
Linked Provider User Type	Select the user type if linking to one. If you select Ordering Facility, select options in the Linked Ordering Facility list.
Search Type	(Available when Provider or Ordering Facility is selected.) Select the range of patient and other data that the user may search: full patient database, or only the associated patients in the portal.
Scheduled By	(Available when Ordering Facility is selected.) Select an option to control the dates available to the user when requesting an appointment in the ordering facility portal.

4. Click **SAVE**.
5. Optional.
   - To limit what the user can view on the worklist, see "Configure a user worklist filter."
   - To view a user's devices, click the **ATTACHED DEVICES** sub-tab.
   - To restrict the user's access to specific ordering facilities, click the **USER PERMISSIONS** sub-tab.

Reset a user's password as an administrator

If a user forgets their password, an administrator can reset it or prompt the user to reset it the next time they log in.

1. On the burger ▤ menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **USERS** tab, double-click the user in the list and do one of the following.
   - Click **RESET PASSWORD**, and then choose a new password for the user.
   - Select the **User Must Change Password Next Login** check box.

4. Click **SAVE**.
5. Inform the user to sign out and then sign in again with the new password, or follow the on-screen instructions to reset their password.

Configure a user worklist filter

In addition to user roles, administrators can customize rights and limitations for individual users. You can customize which items appear in the worklist for individual users or user groups.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **User Management**.
3. On the **USERS** tab, double-click a user row to open a user.
4. On the **WORKLIST FILTER** sub-tab, perform one or more of the following procedures.

Configure general user worklist filter settings

You can finely control the information on the worklist to which the user has access.
1. In the left pane, click **GENERAL**.
2. Enter the following settings, and then click **SAVE**.

Setting	Description
Show Encounters Only	Select to show only studies involving interaction between a patient and provider.
Show DICOM Studies Only	Select to show only DICOM (imaging) studies.
Disable Right-Click on Worklist	Select to prevent the user from opening the worklist shortcut menu.
Show RIS Orders Only	Select to show only orders from RIS.
STAT Studies Override Current Sub-Filter	Select to always show studies with assigned STAT levels, regardless of any other filtering criteria.
Show Assigned Studies Only	Select to show only studies to which a user is assigned.
Deleted	Select whether to show all, only, or no (None) deleted studies.
Configure the settings below together to compose a single filtering condition.	
Date Operations By	Select a study property against which to apply criteria. **Study Date** **Study Received Date** **Scheduled Date** **Last Call Made** **Created Date**
Preformatted	Select from a list of preformatted date ranges, rather than manually entering one by using the settings in the table rows below. *Example*: Date Operations = **Study Date** Preformatted = **Last 7 Days** "If the study date falls within the last 7 days, display the study on the user's worklist"
Last/Next	Select a time range for the selected property. *Example*:

Setting	Description
	Date Operations = **Study Received Date** Select **Last**, type 8, select **Week(s)** "If the study was received some time during the last 8 weeks, display the study on the user's worklist."
Date From / Date To	Select and enter a date range for the selected property.
From / To	Select and enter a time range for the selected property.

Limit access to patient information

You can limit the worklist to only display studies for patients who satisfy certain criteria.
1. In the left pane, click **PATIENT INFORMATION**.
2. Under **Patient Name**, select a logic option, type the exact portion of the patient name that corresponds to the selected logic option, and then click the plus [+] button to add the criterion.
3. Under **Account No.**, perform the previous step as appropriate for the account number.
4. Click **SAVE**.

Limit access to study information

You can limit the worklist to only display studies that satisfy certain criteria.
1. In the left pane, click **STUDY INFORMATION**.
2. For each criterion, select a logic option, and then type or select a value.
3. For example, to display only abdominal studies, under Body Part:
    * Select the **Is** option
    * In the list of body parts, select **Abdomen**
4. Click **SAVE**.

Limit access to information related to specific resources

You can limit the worklist to only display studies whose resources satisfy certain criteria.
1. In the left pane, click **RESOURCE**.
2. For each criterion, select a logic option, and then type or select a value.
    For example, to display only studies whose referring physician is *Jane Doe*, under **Ref. Phys.**:
    * Select the **Is** option
    * In the box, type JANE DOE, and then click the plus [+] button.
3. Click **SAVE**.

Limit access to information from specific insurance providers

You can limit the worklist to only display studies for patients who satisfy certain criteria.
1. In the left pane, click **INSURANCE**.
2. For each criterion, select a logic option, and then type or select a value. For example, to hide studies under litigation, under **Insurance Provider Type**:
    * Select the **Is Not** option
    * In the box, select **Litigation**, and then click the plus [+] button.
3. Click **SAVE**.

Manage who is online

Users with user management rights can view a list of users who are online, view a user's activity log, and terminate their session.
1. On the burger [≡] menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **User Management**.

3. To view a list of current users, click the **USERS ONLINE** tab.
4. Optional: To view a session log for a user, click the log button.

View assigned studies and patients

You can view lists of studies and patients that are assigned to you (the current user).

1. On the burger menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **User Management**.
3. Do one or both of the following.
   - To view studies assigned to you, click the **ASSIGNED STUDIES** tab, and then click a sub-tab to filter by user type.
   - To view patients assigned to you, click the **ASSIGNED PATIENTS** tab.

Grant access to third-party tools

You can configure which users have access to which third-party tools, such as Updox.

1. On the burger menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **User Management**.
3. On the **THIRD PARTY TOOLS** tab, select one or more users:
   - To select a single user, in the **Search users** box, type all or part of the user name, click **Ungroup** users, and then select the correct user in the list.
   - To select one or more user groups, click the **Remove All Users** button (to show the Select All Users button), click the user group to select, and then click **Select All [Group] Users**.
4. In the **Third Party Tool** list, select which tools to make available to the selected user or users by turning the tool's switch from off to on.
5. Optional: Edit tool configuration settings.

Copy settings from one user to another

To create new users more quickly, you can add a user and then copy settings from an existing user.

1. On the burger menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **User Management**.
3. On the **COPY PROFILE SETTINGS** tab:
   - In the **Source User** list, select the user whose settings you want to copy.
   - In the **Destination User** list, select a user to configure with the source user's settings, and then click the plus button.
   - Optional. Repeat to configure additional users with the source user settings.
4. Click **SAVE.**

Configure Mobile RAD

You can set up mobile radiology including vehicles, technologists, and geographical information.

Configure assets for Mobile RAD

To use mobile RAD you must first configure assets by carrying out the following procedures.
1. Add a technologist (see "Add a resource"), and assign a schedule template to that technologist.
2. Configure at least one ordering facility (see "Configure an ordering facility").
3. Configure a place of service (see "Add a POS map").

Configure vehicles

You must register in Exa PACS/RIS vehicles that you will use for Mobile RAD. Perform this procedure for each vehicle in your fleet.
1. On the burger menu, click **SETUP**.

2. Next to the burger button, click the word in all caps, and then select **Mobile RAD**.
3. On the **VEHICLE REGISTRATION** tab, click **ADD**, and then enter the following settings.

Setting	Description
Vehicle Name	Type any name.
Make	Type the manufacturer of the vehicle.
Model	Type the model of the vehicle.
Device ID (GPS)	Type the ID number of the GPS device for the vehicle.
Color	Type the color of the vehicle.
VIN	Type the vehicle identification number of the vehicle.
License Plate No.	Type the license plate number of the vehicle.
License Plate State	Type the state of issue of the license plate.
Facility	Select facilities for which the vehicle is used.
Inspection Expiration Date	Select the date of next required inspection.
Registration Expiration Date	Select the date of expiration of the vehicle registration.
Vehicle Note	Types notes.

4. Under **Equipment Type**, click the plus ✚ button, and then in the **Equipment** dialog box, enter settings for each piece of radiology equipment in the vehicle.

5. Under **Maintenance**, click the plus ✚ button, and then in the **Maintenance** dialog box, enter vehicle maintenance information.

6. Under **Location**, click the plus ✚ button and then enter settings for each location where the vehicle is parked on particular days.

7. Click **SAVE**.

Configure general settings

You can set up study forms, custom forms, templates, and queues, and perform limited database queries.

Create a study form

Study forms are interactive electronic forms that people inside and outside of your organization can use to gather or provide needed information quickly—and often automatically. Examples include consent forms for HIPPA or treatments, screening forms, pain sheets, affidavits, customer payment plans, and procedure checklists. For information on how to use forms, see "Add a study form to a patient record" and "Attach study forms."

Set up a study form

Use the following procedure to initially set up the form, and then see other topics to add and edit form contents.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **FORM BUILDER** tab, click **ADD**.
4. Type a name for the form, and then click **SAVE**.

5. In the left pane, on the **ASSIGN** sub-tab, enter the following settings to define the scope of the form and filter its availability.

Setting	Description
Document Type	Select a type in order to group forms and make them easier to find.
Viewable on Patient Portal	Select to make the form available from the patient portal and in Patient Kiosk.
Auto Assign to Study	Select and then enter criteria for studies to which to automatically assign the form. Assigned forms appear in the Study Forms tab of the edit study screen, making them available to users without performing dedicated searches.
Insurance Provider Allow All with Empty Allow All without Empty	Select to restrict availability to the form to specific insurance providers. Select to make all providers available if none are specified. Select to make the field required.
Physician Allow All with Empty Allow All without Empty	Select to restrict availability to the form to specific physicians. Select to make all physicians available if none are specified. Select to make the field required.
CPT Codes Allow All with Empty Allow All without Empty	Select to restrict availability to the form for studies with specific CPT codes. Select to make available for all CPT codes if none are specified. Select to make the field required.
ICD Codes Allow All with Empty Allow All without Empty	Select to restrict availability to the form for studies with specific ICD codes. Select to make available for all ICD codes if none are specified. Select to make the field required.
Markets	The form is available to patients in, or having exams scheduled in the markets you select. All facilities in the selected markets become selected in the Facilities field below.
Facilities	The form is available to patients in, or having exams scheduled in the facilities you select.
Modalities	Select to restrict availability to the form to studies from specific modalities.
Male Patient Only	Select to restrict availability to the form for male patients only, such as for prostate exams.
Female Patient Only	Select to restrict availability to the form for female patients only, such as for HSG exams.
Mammo Patient Only	Select to restrict availability to the form for mammography patients only.

6. Click **SAVE**.

Add a header to a study form

1. At the top of the **FORM BUILDER** tab, select the **Header** check box.
2. In the form area, click the word "Header."
3. In the left pane, on the **PROPERTIES** tab, click **CHANGE LOGO**.
4. Browse for and select a logo, and then click **Open**.
5. In your form header, select the word "Header" and then replace it by typing a new field name.
   For example, type Study Date:
6. In the left pane, on the **MERGE FIELDS** tab, in the search box, type search term to look for a relevant merge field.
   For example, type study.
7. In the list of results, double-click a merge field to add it to the form header.
   For example, double-click **StudyDate**.
8. To the right of the $$StudyDate$$ merge field, type a new field name.
   For example, type Patient Name:
9. Repeat steps 5–6 to find and add a merge field for the patient name.
   Hint: Search for "name" rather than "patient."
10. In the left pane, on the **PROPERTIES** tab, use the **Spacing** and **Style** controls to modify the layout.
11. Click **Save**.
    Your header could look something like the following.
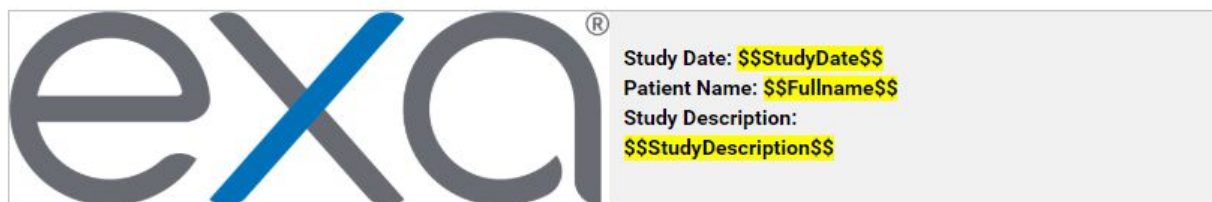
Add text fields to a study form

Use text fields to **gather typed information from** or **provide typed information to** the person filling out the form. In general, consider using:

   Text Boxes to gather one-line user input
   Text Areas to provide boilerplates
   Free Text boxes to gather or provide information longer than one line.

The following compares the properties of text fields.

	Text Formatting	Variable Height	Scrollable	Minimum Height	Printer Friendly	Inline Controls
Text Box	No	Yes[1]	No	1 line	Yes	Yes
Text Area	No	No	Yes	1 line	No	No
Free Text	Yes[2]	No	Yes	5 lines	Yes	No

1. With **Dynamic Input** selected.
2. Font family, size, emphasis, and alignment.

To add a text field:

1. Drag the **Text Box**, **Text Area**, or **Free Text** button onto the form.

2. Click the word "Untitled," and then in the left pane, in the **Question** box, type text to introduce or label the text input box. For example:
   For an information gathering box, type `Please list all allergies`.
   For an information providing box, type `Liability waiver`.
3. If the text field is for providing information, enter the information in the box.
   Adjust vertical spacing:
   - To adjust the space between the question and the box, use the **Line Height** slider.
   - To adjust the space before and after the text field, use the **Padding** slider.
   - To apply adjustments to all fields on the form at once, select **Apply Spacing to All** check box, and then use the sliders.
   - If using a Text Box, select the following options for **Inline Controls**.

Setting	Description
Fit on One Line	Select to place the label one the same line as, and to the right of, the text input box.
Inline Multiple Controls	Select this option for two adjacent text boxes to place both on the same line.
Question First	Select to move the label to the left of the text input box.
Append Text Input	Select to add a new input box between the label and the original input box. This new input box is only available to the person filling out the form.
Dynamic Input	Select to fit the height and width of the text box to the text it contains.

   - If using Free Text to provide information, format your text as needed by using the **Style** controls.
   - To adjust the width of the text field, select an option in the **Size** list.
4. Click **SAVE**.

Add check boxes to a study form

1. To add a group of check boxes, drag the **Check Box** button onto the form.
2. Click the word "Untitled," and then in the left pane, in the **Question** box, type text to label the check box group.
   For example, type: `Allergies`.
3. Adjust the vertical **Spacing**, **Inline Controls**, and check box label **Style** (see "Add text fields to your form").
4. To add a new check box to the group, click **ADD ANSWER**.
5. To label individual check boxes, type labels in the boxes under **<u>Answers</u>**.
   For example, type `Peanuts` for the first check box, and `Mold` for the second.
6. To arrange the check boxes in columns, select a number in the **No. of columns for Answers** list.
7. To add an "Other" check box with accompanying text input box, select the **Add Other** check box.
8. Click **SAVE**.

Add options to a study form

While check boxes make the person filling out the form able to select more than one option, options provide an "either/or" setting. You add an option group to your form by using the same procedure as

for check box groups, except that you drag the **Radio Button** button onto the form instead of the Check Box button.

Add a group box to a study form

A *group box* is a named group that can contain one or more check box groups and/or one or more option groups. To add a group box:

1. Drag the **Group** button onto the form.
2. Click the word "Group Title," and then in the left pane, in the **Question** box, type text to label the group.
3. To add a background image to the group, in the left pane, click **CHANGE IMAGE**, browse for and select an image, and then click **Open**.
4. To divide the group into columns, in the **Grid Columns** list, select a number of columns.
5. To add a check box group or radio button group into a particular column, in the **New Control Placement** list, select the number of the column, and then drag the **Check Box** or **Radio Button** button onto the group.
6. Configure the check boxes and/or radio buttons as described in "Add check boxes to your form."
7. Click **SAVE**.

Add a footer to a study form

You can add and modify footers in the same way as headers. However, we often recommend using the footer for a signature line with a signature merge field. After the person electronically signs the form, their signature appears in the location of the merge field. To create a signature line in the footer:

1. At the top of the **FORM BUILDER** tab, select the **Footer** check box.
2. In the form area, select the word "Footer," and overwrite it by typing `Signature`.
3. In the left pane, on the **MERGE FIELDS** tab, search for "signature" and then double-click SudyFormSignature in the list of results.
4. Click **SAVE**.

Export and import a study form

To save time creating a form for "Facility A," it may be helpful to import an existing form from "Facility B" and then modify it.

Export an existing study form

1. At Facility B, on the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **FORM BUILDER** tab, select a form, and then click **EXPORT**.
   The form appears in the Windows Downloads folder as a JSON file.
4. Copy the JSON file to the computer at Facility A.

Import a study form

1. At Facility A, on the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **FORM BUILDER** tab, click **IMPORT.**
4. In the **Import Study Forms** dialog box, click **CHOOSE FILE**, browse for and select the copied JSON file, and then click **Open**.
5. On the **FORM BUILDER** tab, find the new form and edit it for use at Facility A.

Create a custom form

Custom forms are non-interactive electronic forms intended for delivering information. For interactive electronic forms that can both deliver and gather information, see "Create a study form."

Set up a custom form

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **CUSTOM FORMS** tab, click **ADD**.
4. In the **Document Name** box, type a name for the form, and then enter the following settings.

Setting	Description
Description	Type a general description.
Labels	[Unused]
Patient Review Patient Mammo Form	[Unused]
Education Material	Select to make the form available in the EDUCATIONAL MATERIAL area of the patient chart.
Reference Document	Select to make the form available in the DOCUMENTS and CUSTOM FORMS areas of the patient chart.

5. In the word processing area, type your form (see "About adding contents to a custom form").
6. Below the word processing area, under **Assign Document**, enter the following settings.

Setting	Description
Modalities	Select modalities to which to assign the custom form.
Facility	Select a facility to which to assign the custom form, and then click the add ➕ button.
ICD Codes Allow All with Empty Allow All without Empty	Select to restrict availability for specific ICD codes. Select to make available for all ICD codes if none are specified. Select to make the field required.
Medication Allow All with Empty Allow All without Empty	Select to restrict availability for specific medications. Select to be available for all medications if none are specified. Select to make the field required.
Lab Codes Allow All with Empty Allow All without Empty	Select to restrict availability for specific lab codes. Select to make available for all lab codes if none are specified. Select to make the field required.
Male/Female/Mammo Patient Only	Select to restrict availability of the form to male, female, and/or mammography patients.

7. Click **SAVE**.

About adding contents to a custom form

The custom form word processing area provides commonly recognizable tools to type, align, and format text, and insert images and merge fields. You can copy and paste contents by using the **Ctrl +**

C ad **Ctrl + V** keyboard shortcuts. To change font sizes, select text that you want to resize, and then select a size in the **Formats** list.

Add merge fields to a custom form

In this example we show you how to add a signature merge field to a custom form. You must add a signature merge field to be able to electronically sign the form.

1. In the right pane, in the **Merge Fields** area, in the search box, type search term to look for a relevant merge field.
   For example, type `sign`.
2. In the list of results, double-click a merge field to add it to the form.
   For example, double-click **CustomFormSign**.
3. To the left of the $$CustomFormSignature$$ merge field, type a new field name.
   For example, type `Signature:`
4. Click **SAVE**.

Editing a custom form

Note: If you edit an existing form, your changes will *not* appear on forms that are already attached to a patient chart. To edit a form:

1. On the burger 🍔 menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **CUSTOM FORMS** tab, click the form 📄 button of the custom form that you want to edit.
4. Edit the form as needed, and then click **SAVE**.

DB Totals

As an alternative to reports, the DB Totals tab contains a tool for quickly searching the PACS and RIS databases with customizable queries. A DB total search tells you how many patients, studies, and images in your databases match the search criteria.

1. On the burger 🍔 menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **DB TOTALS** tab, enter the following search criteria.
   Note: If you performed a search previously during the current session, refresh your browser before entering new criteria.

Setting	Description
Date Range	Select a date range within which to search.
Study Date Study Received Date Approved Date	Select a category for the date range: Search all studies with a study date within the date range. Search studies whose DICOM receive date is within the date range. Search studies that were approved during the date range.
Facility	Filter the search by facility.
Modalities	Filter the search by modality.
Study Description	Filter the search by study description.
Institutions	Filter the search by institution.
ADD	To add a new institution to the list, clear the **All** check box, type the name of the institution in the box, and then click **ADD**.

4. To run the search, click **UPDATE TOTALS**.
5. The search results appear below the button under **DB Details**.
6. Optional. To export a more detailed report of your search and results, click **CSV REPORTS**.

Configure email templates

Email templates define the contents and format of emails that are automatically sent from a provider to the referring provider at the specified stage. After configuring email templates, you must turn on the emailing feature by following the procedures in "Set up emailing of exam results."

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **EMAIL TEMPLATE** tab, click **ADD**, and then enter the following settings.

Setting	Description
Template Name	Type a name for the template.
Category	Select the stage at which to send the email.
Subject	Type text to appear on the email's Subject line.
Market	Select the market for the template. All facilities associated with the select market become selected in the Facilities field below.
Facilities	The template applies to studies associated with or scheduled in the facilities you select.

4. Use the word processing tools to compose the body of the email.
5. To automatically insert exam details into the email:
   a. In the right pane, in the search box, type a category of information (e.g. patient).
   b. In the resultant **Merge Fields** list, double-click a merge field to add it (e.g. Fullname).
6. Click **SAVE**.

Set up emailing of exam results

You can configure Exa PACS/RIS to automatically send exam results to referring providers by email. **Prerequisite**: Configure email templates.

1. Configure the company's email server (under "Configure your company," see "Configure general settings").
2. Configure a facility, and select the facility's **Email Report Link** and/or **Email Attachment** check boxes (see "Add a facility").
3. Configure a referring provider, and select provider's **Email Report Link** and/or **Email Attachment** check boxes (see "Add a resource").

Configure notification templates

Notifications here means automatic fax or email notification from a provider to a referring provider about an exam, such as when the provider completes an approved report. When you configure a referring provider, you select whether and how to receive notifications (see "Add a resource"). In the following procedure you can create a notification template that defines the contents of the notification.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **NOTIFICATION TEMPLATES** tab, click **ADD**, and then enter the following settings.

Setting	Description

Template Name	Type a name for the template.
Subject	Type text to appear on the email's Subject line.
Market	Select the market for the template. All facilities associated with the select market become selected in the Facilities field below.
Facilities	Select facilities to which you want to associate the template.

4. Use the word processing tools to compose the template.
5. To automatically insert exam details into the notification:
    a. In the left pane, in the search box, type a category of information (e.g. patient).
    b. In the resultant **Merge Fields** list, click a merge field group (e.g. **Exam Details**).
    c. To add a merge field to the template, double-click it (e.g. PatientLocation).
6. Click **SAVE**.

Create fax cover sheets

You can create a cover sheet to automatically attach to faxes. You can create one cover sheet for each facility. To create a cover sheet:

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **COVER SHEETS** tab, click **ADD**.
4. Type a name for your cover sheet, select the facility where the cover sheet will be available, and then click **SAVE**.
5. Use the word processing tools create your cover sheet, and then click **SAVE**.
6. Click **SAVE & CLOSE**.

Work with the report queue

You can open a report queue that shows reports that you previously generated or that are currently in process. You can resend (reprocess) individual reports, or reprocess them in batches.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. Click the **REPORT QUEUE** tab.
4. To resend a report, right-click it in the list and then select **Resend**.
5. To resend a batch of reports, at the top of the list, select **REPROCESS SELECTED** or **REPROCESS FAILED**.
6. To resend a report automatically at a later time, right-click it in the list and then select **Requeue**.

View logs

To view the various logs that are available in Exa PACS/RIS, do the following.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Log**.
3. Enter information as needed in the following tabs (AUDIT LOG, USER LOG, etc.).

Work with the dashboard

What is the Dashboard?

The Dashboard is a page that displays gadgets, which contain information in graph, table, and other formats to help you understand the status of work at your facility. The Dashboard is separate from the Dispatching Dashboard, which is dedicated to scheduling mobile exams.

Open the dashboard

- On the burger ▬ menu, click **DASHBOARD**.

Add or remove gadgets from the dashboard

The dashboard displays an array of user-customizable *gadgets*, and a gadget with a button for adding more gadgets.

1. To remove a gadget, click its remove ✖ button.
2. To add a gadget, find the **Add Gadget** gadget and click the add ⊕ button.
3. In the list of gadget types, click a type.

Change the graph type of a gadget

You can select a graph type of bar, column, line, or pie.

1. On a gadget, click the graph 📊 button.
2. In the button shortcut menu, click a type.

Change the facility of a graph

You can change the source facility of the graph in a gadget. The available facilities are ones that you set up in advance in Exa PACS/RIS.

1. On a gadget, click the facility 🖥 button.
2. In the button shortcut menu, click a facility or click **All Facilities**.

Change the date range of a graph

You can change the date range of the data source of the graph in a gadget.

1. On a gadget, click the date range 📅 button.
2. In the button shortcut menu, click a date range and then click **Apply**.

Work with the worklist

The worklist is the starting point for most operations in Exa PACS/RIS. The worklist is a searchable and highly customizable list of patients, studies, and series, providing full access to demographics and images.

Worklist settings

About toolbars and elements in the worklist

The worklist provides the following toolbars and other items. Notice that there is a settings menu button in both the upper and lower toolbar, but they open different menus.

Upper toolbar

The upper toolbar contains the following elements, from left to right.

1	Tasks	Shows the number of tasks by urgency. Click to jump to the Tasks list.
2	STAT meter	Shows the number of studies at each STAT (urgency) level.
3	TAT meter	Shows the number of studies at each TAT (turnaround time).
4	Settings	Opens the settings menu.
5	Log off	Logs off the current user.

Lower toolbar

The lower toolbar contains the following elements.

1	Move tabs left/right	Left/right justifies the worklist filter tabs.
2	Filter menu	Select from any available filter tab.
3	Refresh	Updates the worklist, but keeps manually entered filters.
4	Refresh all	Updates the worklist, clearing all filters.
5	Settings	Opens the PACS Actions menu.
6	Filters	Opens the Study Filters dialog box.
7	Search tools	Shows/hides the search bar.
8	Disagreements	Opens the disagreements queue (requires a separate license for Advanced Peer Review)

Filter bar
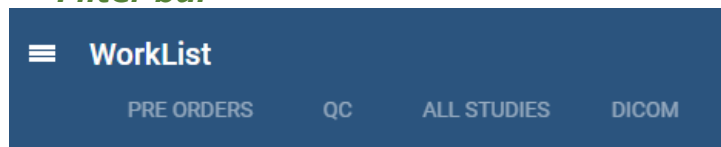
Filter tabs appear on the left side of the worklist by their labels.

About filter tabs in the worklist

The following table describes the four types of filter tab (filters) that are available in the worklist.

Type	Name	Description

Permanent (Cannot be hidden)	ALL STUDIES	Lists all DICOM studies and scheduled RIS orders that are not currently on the QC tab.
Optional (Can be hidden)	PRE ORDERS	Lists unscheduled orders. Pre orders often have no referring physician, and come from the patient portal (such as exams requested by the patient).
	QC	Lists studies needing reconciliation.
User Filters (Can be hidden)	[user defined]	Provide a highly customized view of the worklist.
Temporary	TIME EXCEEDS STUDIES	When you click the Exceeds Maximum Time Limit link at the bottom of the worklist, this tab opens and lists relevant studies. Click the pushpin button on the tab to display a dialog box with options, including "Remove."

Display a filter of the worklist

You can display optional filters (such as PRE ORDERS or QC) in the following two ways. To display user filters, you can use these steps if the filter was configured to appear as a tab or in the tabs list.

1. On the worklist, in the filter bar, click a tab to display the filter.
2. In the lower toolbar, click the **Show all Tabs by list** button, and then select a filter.

Create a worklist filter

Exa PACS/RIS comes with the PRE ORDERS, QC, and other filters, but you can also create your own filters to customize the worklist at a high level of precision.

1. On the worklist, on the lower toolbar, click the filter button.
2. In the **Study Filter** dialog box, click **ADD.**
3. Enter the following criteria.

Setting	Description
Filter Name	Type a name for the filter
Show Encounters Only	Shows only studies for outpatient encounters.
Joined Filters	Selects another filter to combine with the current filter. Studies must meet the criteria in both filters to appear in the worklist.
Filter Order	Determines the order in which filters appear as tabs or list items, from low to high.
Is Private	Restricts availability of the filter to the user who created it.
Display as a Tab	Shows the tab for the filter on the worklist.
Display in Dropdown	Shows the filter in the Show Tabs by list list on the worklist.
Show Only Exceeding Max Time	Shows only studies that are exceeding their max time as specified in "Configure study statuses."
Show DICOM Studies Only	Shows only DICOM studies (studies containing images).
Show RIS Orders Only	Shows only RIS orders.
Show Assigned Studies Only	Shows only studies that were assigned to the current user.

Setting	Description
Show Pre-Orders Only	Shows only pre-orders.
Deleted	Shows all (deleted and non-deleted) studies, no deleted studies, or only deleted studies.
Assign	Assigns the filter to specific users or user groups.
Default Column/Sort By	Sorts the worklist by the column and order that you select.
DATE/TIME	Filters studies by a range of dates and times.
PATIENT INFORMATION	Filters studies by patient or account number.
STUDY INFORMATION	Filters studies by institution, facility, modality, body part, and other categories.
RESOURCE	Filters studies by physician or attorney.
INSURANCE	Filters studies by insurance provider.

4. Click **SAVE.**

Edit or delete a worklist filter

You can edit or delete a filter that you created.

1. On the worklist, on the lower toolbar, click the filter ▼ button.
2. In the **Study Filter** dialog box, find the filter to edit or delete.
3. Click the edit ✎ or delete 🗑 button of the filter to delete.

Show or hide a worklist filter

You can show filters as tabs on the worklist, as items in the filter menu, as both, or as neither (you can hide them for later use without deleting them).

1. On the worklist, on the lower toolbar, click the filter ▼ button.
2. In the **Study Filter** dialog box, double-click the filter to show or hide.
3. In the second **Study Filter** dialog box, select or clear the **Display as a Tab** check box and the **Display in Dropdown** check box.

Select a quick filter of the pre orders tab

At the bottom of the PRE ORDERS tab, you can select from the following check boxes to quickly filter the list of pre-orders.

Quick Filter Check Box	Description
Waiting for Authorization	Shows only unauthorized pre-orders.
Show Only Expired	Shows only pre-orders that are past the authorization date.
Show Only Physician Orders	Show only pre-orders created from Referring Provider Portal.
Show Only Ordering Facility Orders	Show only pre-orders created from the ordering facility portal.

User settings

User settings (from the worklist) control how the worklist appears and functions when the user who configured them signs in. User settings override global settings, except for security settings.

Configure worklist columns

You can show, hide, and order columns in the worklist.

1. On the worklist, on the upper toolbar, click the settings ⚙ button, and then in the button shortcut menu, click **User Settings**.
2. In the **User Settings** dialog box, under **Column Order**, do one or more of the following.
   - To show or hide a column, select or clear its check box.
   - To reorder a column, drag the column to a new position in the list.
   Note: You can also drag columns directly on the worklist.
3. Click **SAVE.**

Configure other user settings

You can configure a variety of behaviors and settings for worklist tabs, columns and rows, and other user settings.

1. On the upper toolbar, click the settings ⚙ button, and then in the button shortcut menu, click **User Settings**.
2. In the right side of the **User Settings** dialog box, configure the following settings and then click **SAVE.**

Setting	Description
Show Row Number	Select to display the row number column in the worklist. The column is labeled as "#" or "No."
Show Priors	Select to show prior studies on the worklist, or clear to show series and images instead. Whether you choose to show priors or series, you can view them by clicking the expand ✚ or collapse ▬ button in a study row.
Show QC	Select to show the QC tab, and select the Show Completed in Pending List check box to show include completed orders in the QC tab.
Show Orders Tab	Select to show the PRE ORDERS tab in the worklist.
Auto-Open New Order	Select to automatically open the edit study screen after clicking the CREATE ORDER button (see "Work with scheduling").
Auto-Open Appointment Confirmation	Select to automatically open the appointment confirmation screen after clicking the CREATE ORDER button (see "Work with scheduling"). This screen provides a convenient summary to read to the patient over the phone, or to send as an email.
Double-Click Behavior	The view or app in which a study appears when double-clicking a row, unless the study is scheduled.
Double-Click (Scheduled)	The view in which a scheduled study appears when you double-click it.
Default Tab	The default tab for the worklist.

Setting	Description
Default Filter (Local Cache)	The default filter for the worklist.
Default Column	The default column for the worklist that determines the sort.
Sort By	Whether the list is sorted in ascending or descending order.
audioPlayerLagTime	The amount of delay before starting audio playback.
Auto Open Priors	Turns automatic opening of priors in the viewer on and off.
Open Prior Reports	Automatically opens prior reports when opening a study.
Voice recognition	When opening a DICOM study in the Exa PACS/RIS viewer: **Dragon (Exa Trans)**: Opens Dragon Naturally Speaking for radiologist transcriptions rather than Exa Dictation. You must install Exa Trans on the local workstation to use this option. **Dictation (Web Trans)**: Opens Exa Dictation. **Off (None)**: Does not open a voice recognition tool
Delay Load of Exa Trans	Delays loading of the Exa Trans transcription screen, to focus attention on images before the transcription.
Exa Trans Font	Sets the font used by Exa Trans.
Exa Trans Font Size	Sets the font size used by Exa Trans.
Default Time Increment	Sets the default time increment for time blocks in the schedule book.

Viewer settings

See "Configure the viewer."

Local service settings

See "Install local cache" in the appendix.

Use the worklist

Enter topic text here.

Open the worklist

- On the burger ▤ menu, click **WORKLIST**.
  Initially, the worklist is empty until you add filtering criteria (see "Find and view studies," and "Create a filter").

Find and view studies

You can find a study and open it to view or edit details.
1. In the worklist, on the **ALL STUDIES** tab, in the search bar, do one or both of the following:
   - Type or select one or more criteria in a column header and press **Enter**.
   - Click a column header to sort the list.
   Note: For tips on searching, see "Search syntax."
2. Double-click a study in the list to open it for viewing or editing.

View priors

You can view the prior studies of any study in the worklist that includes them.
Prerequisite: In the user settings, select the **Show Priors** check box.

1. In the worklist, find a study.

2. On the study toolbar, click the expand ✚ button.
   The priors appear in rows below the study row.

View series and images

You can view series and images of any study in the worklist that includes them.
Prerequisite: In the user settings, clear the **Show Priors** check box.

1. In the worklist, find a study.

2. On the study toolbar, click the expand ✚ button.

3. The series appear in rows below the study row. You can double-click a series row to open the series in the viewer.

4. On the series row, click the expand ✚ button.

5. The images in the series appear in rows below the series row.

6. To view a large thumbnail of an image, click the 🖼 button in the image row.
   Note: To view an image thumbnail, the status must be Incomplete or Unread.

7. To view an image in the viewer, double-click it.

Use the study toolbar buttons

Each study on the ALL STUDIES tab or corresponding user filters of the worklist has its own toolbar on the left side of the study row. Depending on the properties of the study, one or more of the following tools are available.

Tool	Name	Description
✚ / ➖	Expand/Collapse	Expands or collapses the study row to show or hide series or priors.
📋	Prior	Displays a list of prior studies in a custom filter.
⬛	Check box	Click to select the study for further processing by commands in the PACS Actions menu.
🌐	DICOM Viewer	Open the study in the Exa PACS viewer. See "Work with the Exa PACS/RIS viewer." This button is only available for studies that contain images.
👁	Opal Viewer	Open the study in the Opal viewer (requires installation). This button is only available for studies that contain images.
✏	Edit	Opens the study for editing. See "Edit study screen."
★	VIP	If solid green, the study is conducted on a VIP. See "About VIPs."
📄	View Transcription	Opens the dictation and transcription editor. See "Dictation and transcription."
▦	Multi-panel	Opens the study in the multi-panel, an operating panel for working with dictation, transcription, documents, notes, and other information.

Tool	Name	Description
	Approved Report	Opens approved reports of the study.
	External app.	Opens the current study in an external application if configured (see "Configure opening of a third-party program.").
	Authorization	**Red star**: Click to manually authorize. See "Manually authorize an exam." **Green star**: All insurance levels (primary, secondary, tertiary) that require authorization have been authorized. **Gray star**: No authorization is needed.
	Unread DICOMs	Click to view unread images. In the Unread DICOMs dialog box, click MARK AS READ, or OPEN IN VIEWER to read the images in the Exa PACS/RIS viewer.
	Notes	Opens a screen for entering and viewing notes related to patient, study, schedule, and reason for study, and for updating the call log. The button turns blue if study notes are available.
	Study menu	Displays the study shortcut menu (you can also right-click anywhere on the study row to display the shortcut menu). See "Worklist shortcut menus."

Use the order toolbar buttons

Each order on the PRE ORDER tab or corresponding user filters of the worklist has its own toolbar on the left side of the order row. Depending on the properties of the order, one or more of the following tools are available.

Tool	Name	Description
	Select	Click to select the order for deletion.
	Edit	Click to open the order in the Edit Order screen.
	VIP	If solid green, the study is conducted on a VIP (see "About VIPs").
	Authorization	**Red star**: Click to manually authorize. See "Manually authorize an exam." **Green star**: All insurance levels (primary, secondary, tertiary) that require authorization have been authorized. **Black star**: No authorization is needed.

Manually authorize an exam

Exams that satisfy preconfigured authorization rules appear in the ALL STUDIES tab of the worklist with a red star, indicating that you must authorize them. For information about authorization, see "What are authorization and eligibility?" and "Add authorization rules."

1. In the worklist, find a study with a red star, click the red star, and then select the study description in the pop-up window.
2. In the **Manual Authorization** dialog box, in the **Insurance Level** list, click an unauthorized insurance level.
3. Fill in the remaining fields with information from the insurance provider.

4. Click **SAVE.**

Update the worklist or viewer

After performing tasks that modify studies it may be necessary to update the worklist or viewer to show changes. To do so:

- While viewing the worklist or viewer, press **F5**.

About color highlighting on the worklist

When the globe 🌐 button for studies on the worklist is highlighted, this indicates the caching status as follows.

🟩	Caching completed
🟨	Caching in progress
🟥	Some images could not be cached

Verify eligibility of pre-orders and studies with PokitDok

If the insurance provider is a PokitDok trading partner, you can verify eligibility by using the procedure below. Otherwise, see "Manually verify eligibility of pre-orders and studies."

1. On the worklist, in a study row, click the edit 🖉 button to open the edit study screen.
2. In the left pane, click **INSURANCE PROFILE**, and then open a profile.
3. Under **Insurance Details**, select a service type, and then click the green **Check Eligibility** button.
   Result: If the verification succeeds, an eligibility report appears.

About drawing attention to orders and studies

There are several methods to draw attention to orders and studies that are of special consideration. You can use different individual or combined methods to best meet your needs. The following gives a general description of the available options.

STAT level	The medical urgency. Setting a STAT level places the study at the top of the worklist. You can edit STAT levels and descriptions, and add new ones. STAT levels drive workflows. See "Change the urgency of an order" or "Change the urgency of a study."
TAT	The turnaround time. Studies that are near or beyond the TAT are flagged in red and appear at the top of a radiologist's unread studies worklist.
Priority	By default you can set the priority to High, Medium, and Low, but you can edit these and add more options. Priority is primarily used to sort the worklist (on the Priority column). See "Change the priority of an order" or "Change the priority of a study."
Critical findings	Medical findings that you can customize. In Exa Trans, you can select critical findings in a list to send notification the referring physician. See "Assign critical findings to an order" or "Assign critical findings to a study."
Flag	With flags you can mark a study with a customized description that can serve as a filter. You can only assign one flag per study. See "Flag an order" or "Flag a study."

Use local caching

To use the features in this topic (except for "Prefetch studies to your local cache"), you must install local cache (see "Install local cache" in the appendix).

Perform a server prefetch

You can manually initiate a server prefetch from the worklist, whereby the server decompresses a study and copies it to a "local" cache on the server. If large studies will be opened in the near future, you can perform a server prefetch of those studies for faster loading.

1. On the worklist, click the **ALL STUDIES** tab.
2. On a shortcut menu of a study that contains images, point to **Images**, and then click **Server Prefetch**.

Prefetch studies to your local cache

You can manually prefetch studies "on demand."

1. On the worklist, click the **ALL STUDIES** tab.
2. On the shortcut menu of a study that contains images, point to **Images**, and then click **Add to My Local Cache**.
   Result: The server queues the images for sending.

Prefetch studies to other local caches

1. On the worklist, click the **ALL STUDIES** tab.
2. On the shortcut menu of a study that contains images, point to **Images**, and then click **Send to Local Cache**.
3. In the **Local Cache** screen, in the list of available caches, click to the left of one or more destination caches.
4. Do one of the following.
   - To send to the selected caches, click **LOCAL CACHE SELECTED**.
   - To send to all caches, click **LOCAL CACHE ALL**.

Auto-route studies to local cache

You can create a routing rule to send studies that satisfy criteria to your local cache. Complete the following procedures:

- Create an AE title for your local cache (see "Configure application entities").
- Create a routing rule for type LOCAL_CACHE, and select the AE title above (see "Configure routing rules").

Use an on call worklist filter to locally cache studies

You can configure a worklist filter that sends matching studies to local cache.

1. Create a worklist filter (see "Create a filter").
2. On the worklist, click the settings ⚙ button, and then in the button shortcut menu, click **User Settings**.
3. In the **Default Filter (Local Cache)** list, select the worklist filter.
4. Click **SAVE**.
5. On your PC, in a text editor, open the **localCache.cfg** file, located at the following path by default: `C:\Viztek\exa\cfg\localCache.cfg`
6. Find the line for "oncall_enabled" and set it as follows:

   ```
   "oncall_enabled": "true",
   ```

7. Save and close the file.

PACS Actions menu

The PACS Actions menu on the worklist provides top-level access to common functions. To open the menu, on the worklist, click the settings ⚙ button on the lower toolbar. The commands on the menu are described below.

Create a new study
See "Schedule exams."

Schedule a walk-in appointment
See "Schedule exams."

Burn studies to a CD or hard disk
You can burn studies to a CD or hard disk for sharing with other facilities, physicians, or patients.
Prerequisite: Install OPAL Tools (see appendix).
1. Place a CD in the drive.
2. In the worklist, find and select studies that you want to burn, and then do one of the following.
   - On the lower toolbar, click the settings ⚙ button, and then in the **PACS ACTIONS** menu, click **CD Burn**.
   - On the study shortcut menu, click **Send**, and then select the AE title of the CD Burner in the dialog box (see "Send a study.")
3. In the **Opal CD Burning** dialog box, enter the following settings as needed, and then click **START**.

Setting	Description
Include Viewer	Burns a viewer program onto the CD along with the studies. Required for viewing off site.
Write to Disk Only	Writes the study to the hard disk instead of a CD. Browse for and select a destination folder under Path.
Create Annotations Overlay	Converts annotations to an overlay and includes them with the images.
Compression	Specifies a compression algorithm.
Anonymize DICOM	Removes identifying patient demographics.
Remove Annotations	Omits annotations from the burned studies.
Report	Specifies a report storing method.

4. After burning, test the results by opening an image from the CD using the included viewer.

Compare studies
You can open two studies of the same patient in separate viewer screens for purposes of comparison.
Prerequisite: Disable single instance mode (see "Configure other interface settings").
1. In the worklist, select two studies of the same patient to compare.
2. On the lower toolbar, click the settings ⚙ button, and then in the **PACS ACTIONS** menu, click **Compare Study**.

Merge or split studies

In Exa PACS/RIS, *merge* and *split* refer to a category of operations in which you move series and images from one study to another. Additionally, *split* refers to moving images from a study with an incorrect accession number to the correct order. There are many ways to perform merge/split operations, but the following procedures are useful examples. Moving all series and images out of a study deletes the study.

See also, "Add studies to the merge queue." As an alternative to merging studies, see "About alternate account numbers."

Move a series from one study to another study

1. In the worklist, select two different studies that contain series.
2. On the lower toolbar, click the settings ⚙ button, and then in the **PACS ACTIONS** menu, click Merge/Split.
3. In the **Merge/Split Study** screen, in the upper-left corner, click the button once or twice to activate **Move Selected** mode.
4. in the **Merge/Split From** column, click the plus sign of the *first* study (the one on top) to reveal its series.
5. Drag the series onto the *second* study (the one on the lower-right) in the **Merge/Split To** column.
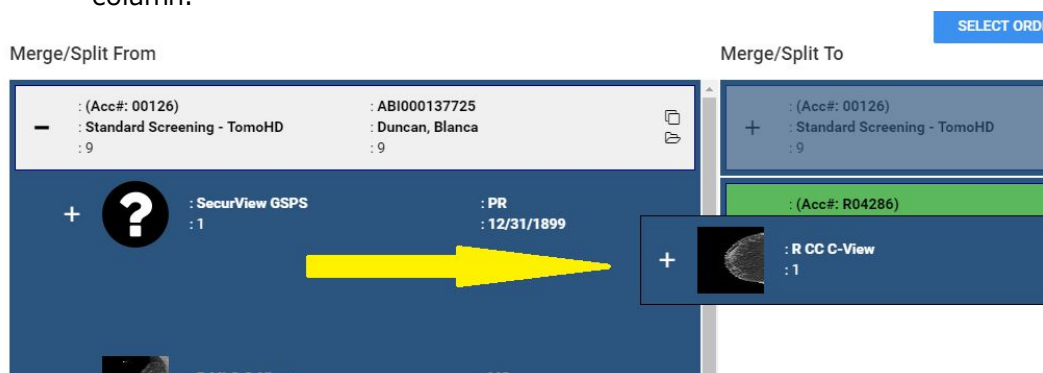
Note: As you drag over the second study, it turns green to indicate when you can release the mouse button.
6. Click **SAVE CHANGES**.

Move all images in one series to a series in another study

1. Repeat steps 1 through 4 in "Move a series from one study to another study.".
2. In the Merge/Split To column, click the plus sign of the second study to reveal its series.
3. Drag a series in the left column onto a series in the right column.
4. Click **SAVE CHANGES**.

Move one or more images from one series to a series in another study

1. Repeat steps 1 through 4 in "Move a series from one study to another study.".
2. In the **Merge/Split To** column, click the plus sign of the second study to reveal its series.
3. In the left column, click one or more images to select them, then drag them onto a series in the right column.
4. Click **SAVE CHANGES**.

Move an image from one series to another series in the same study

1. In the worklist select a study that has multiple series.
2. In the **PACS ACTIONS** menu, click **Merge/Split**.
3. Click the plus sign in both columns to reveal the series.

4. Drag an image from the left column onto a series in the right column.
5. Click **SAVE CHANGES**.

"Split" images into their correct order

1. In the worklist, select one study.
2. In the **PACS ACTIONS** menu, click **Merge/Split**.
3. In the **Merge/Split Stud**y screen, click **SELECT ORDER**, find the correct RIS order, and then click its **SELECT** button.
4. Drag the images to the correct order, and then click **SAVE CHANGES**.

Add a new series to a study

1. In the worklist, select one study.
2. In the **PACS ACTIONS** menu, click **Merge/Split**.
3. In the **Merge/Split To** column, click the new series ⊟ button.
   Note: The new series is added to the bottom of the list.
4. On the new series row, click the edit ✎ button.
5. In the **Edit Study Info**. dialog box, type a description and then click the **EDIT** button.
   Note: You can move series or images into the new series.
6. Click **SAVE CHANGES**.

Duplicate a study

1. In the worklist, select one study.
2. In the **PACS ACTIONS** menu, click **Merge/Split**.
3. In the **Merge/Split From** column, click the duplicate study ⧉ button.
   Note: You can move series or images into or out of the new study.
4. Click **SAVE CHANGES**.

Import DICOM images

You can import DICOM images to a study.
Prerequisite: Install OPAL Tools (see appendix).

1. In the worklist, select a study into which to import images.
2. On the lower toolbar, click the settings ⚙ button, and then in the **PACS ACTIONS** menu, click **Import Images**.
3. In **OpalImport**, click **Select Files/Folder or DICOMDIR to Import**.
4. In the **Open** dialog box, browse for and select files to import, and then click **Open**.
5. In **OpalImport**, configure the settings in the table below.
   Note: This is a partial list. Other settings are self-explanatory or generally unused.

Setting	Description
Do Not Compress	Select to store in DICOM Little Endian format. Clear to compress in DICOM JPEG200 Lossless format.
Overwrite	Select to overwrite any existing instances of the studies.
DB Only	Select to import DICOM data only (no images).
Save before Encode	For troubleshooting purposes: Select to place the images in a folder on the server, and not update the database.
Isolate Fails	Select to place files that failed to be imported into a separate folder.

Setting	Description
Modify Demographics	Select to reconcile demographics before import.
Max Files	Type a maximum number of files to import.
Max Size	Type a maximum data size to import.

6. Click **Import**.
7. Optional. If you selected the Modify Demographics check box, the Modify/Confirm Demographics dialog box appears. Do one of the following.
    - Under **New Info**, edit the demographics and then click **MODIFY**.
    - Under **New Info**, confirm that the demographics are correct, and then click **USE CURRENT**.
8. Click **Exit**.

Purge all deleted

See "Undelete or purge a deleted study."

Export the worklist

You can export the worklist to a CSV file.

1. On the lower toolbar, click the settings ⚙ button, and then in the **PACS ACTIONS** menu, click **Export Worklist**.
2. In the **Export Worklist** dialog box:
    - Optional: In the **Filename** box, edit the default file name.
    - Modify the name of the exported file by selecting or clearing the **Include Timestamp** and **Include Filter Name** check boxes.
    - Under **Link to Download**, click the link.

Worklist shortcut menus

There are two worklist shortcut menus: the order shortcut menu (for PRE ORDERS and studies in the Ordered status), and the study shortcut menu (for studies in the Unread and later statuses). The tasks you can perform by using each shortcut menu are described in the topics in this section. Note that the commands available on the shortcut menus vary depending on the order or study status and other factors.

⚠

Any errors in patient and study information resulting from incorrectly performing the procedures in this section can result in problems with data integrity. Take care to ensure that entered and imported data is correct.

Open a shortcut menu

You can open a shortcut menu by right-clicking its parent object, such as a study or order row.

Schedule an unscheduled order

If you previously entered an order (or a study with a status of "Ordered") without scheduling it, you can schedule it from the worklist.

1. On the worklist, on the order or study shortcut menu, click **Schedule Appointment**.
2. Filter available time slots by entering the following criteria.

Setting	Description
Distance from Patient	Type the patient's ZIP code (see next row), and then select a distance. Time slots at facilities farther from the patient than the number of miles you select are filtered out of the list.
Patient ZIP Code (Postal Code and ZIP Plus)	Type the patient's ZIP code, postal code, and/or ZIP Plus to enable the Distance from Patient filter.
Appointment Type	Shows the first appointment type in the order (read-only).
Facility	Select one or more facilities where the exam could be performed.
Modality Room	Select one or more modality rooms where the exam could be performed.
Date	Select to only show time slots falling within a date range.
Start/End Time	Select to only show time slots starting within a time range.
AM/PM	Click one or both to limit your search to daytime or nighttime.
Days of the Week	Click one or more days that the patient would be available.
Additional Time	Select if the exam requires more time than the standard duration.

3. Select a time slot in the list, and then click **UPDATE ORDER.**

Edit an existing order

You can edit a previously entered order from the worklist.
1. On the worklist, click the **PRE ORDERS** tab.
2. On the order shortcut menu, click **Edit Order**.
3. Edit the order and then click **SAVE.**
   Note: For details, see "Edit order information."

Manually verify eligibility of pre-orders and studies

If you determine that an order, pre-order, or study on the worklist satisfies payment provider eligibility requirements, you can mark it as verified on the worklist. To view the eligibility verification status, display the Eligibility column. See also "What are authorization and eligibility?" and "Verify eligibility of pre-orders and studies with PokitDok."
1. On the worklist, click the **PRE ORDERS** or **ALL STUDIES** tab.
2. On the order or study shortcut menu, point to **Actions** > **Manually Verify Eligibility**.
3. Confirm that the green check box is selected in the **Eligibility** column.

Change the priority of an order

You can set the priority of an order.
1. On the worklist, click the **PRE ORDERS** tab.
2. On the order shortcut menu, point to **Priority**, and then select a priority.

Assign critical findings to an order

You can assign critical findings to an order (for example, "Acute Positive").

Prerequisite: Define critical findings (see "Configure reason codes").

1. On the worklist, click the **PRE ORDERS** tab.
2. On the order shortcut menu, point to **Actions** > **Critical Findings**, and then click a finding.

Flag an order

You can flag an order in the worklist as being of special consideration. You can only apply one flag to an order. Users can filter the worklist by individual study flags. To configure the flags that are available, see "Create a study flag."

1. On the worklist, click the **PRE ORDERS** tab.
2. On the order shortcut menu, point to **Actions** > **Flag**, and then select a flag.

Change the stat level (urgency) of an order

You can assign or change the stat level or urgency (Stat 1–5, or Off) of an order in the worklist.

1. On the worklist, click the **PRE ORDERS** tab.
2. On the order shortcut menu, point to **Stat**, and then click a stat level.

Delete an order

You can delete orders from the worklist.

- On the worklist, click the **PRE ORDERS** tab.

Delete one order

- On the order shortcut menu, point to **Exam** > **Delete Study**.

Delete multiple orders

- Select the check boxes of multiple orders, and then on the shortcut menu, click **Delete Study**.

Require document review

When creating a scan document (or "document") type, you can specify to require that users review the document before moving forward in the study workflow. For example, you can require technologists to review physician orders prior to performing an exam to ensure order accuracy.

1. Add a scan document type (see "Configure app settings").
2. Select your document type, and then select the **Requires Review** check box.
3. Add a study status (see "Configure study statuses").
4. Edit the study status, select the **Document Review** check box, and then select the document types to review.

View or attach documents to an order

You can view attached documents, or scan documents to an order. See also "Scan to a patient" and "Scan to an order or study."

1. On the worklist, click the **PRE ORDERS** tab.
2. On the order shortcut menu, click **Attach Files**.
3. In the **Patient Document** dialog box:
    - To view a document, double-click it in the list.
    - To attach a document, follow the procedures in "Scan and attach paper documents to a patient," and "Scan to an order or study."

Modify or reset the order authorization days

This command lets you quickly change the number of days specified in the authorization rule associated with an exam. You can *reset* the days to the number of days set in the rule, or *modify* the days to an arbitrary number. For more information, see "Add authorization rules."
1. On the worklist, click the **PRE ORDERS** tab.
2. On the order shortcut menu, point to **Actions** > **Reset Authorization Days**, or **Modify Authorization Days**.
3. Optional. In the **Days Count** list, select a new number of days.
4. Click **SAVE**.

Appoint a peer reviewer to a study

See "Use peer review."

Assign a study to users

You can assign one study to one or more users (such as a radiologist). When the user signs in, they can create a filter of the worklist that displays all studies assigned to them. This feature also works in conjunction with the "Show assigned studies only" option under Setup > User Management > [user profile] > WORKLIST FILTER.
1. On the worklist, click the **ALL STUDIES** tab.
2. On a study shortcut menu, point to **Exam**, and then click **Assign Study**.
3. In the **Study Assignment** dialog box, select a user from the list and then click the add button.
   Note: You can repeat this step to assign additional users.
4. Optional. In the **Select radiologist to assign** list, select a radiologist as the referring provider.
5. Optional. In the **Assign for peer review** list, select a radiologist as the peer reviewer. See also "Assign a peer reviewer for a study."
6. Click **SAVE.**

Add studies to the merge queue

You can add studies to a merge queue from the worklist, and then merge or split them by following the procedures in "Merge or split studies."
1. In the worklist, click the **ALL STUDIES** tab.
2. Optional. To start merging or splitting with one study at a time, on a study shortcut menu, point to **Exam**, click **Merge/Split**, and then skip to the last step.
3. Right-click the first study, point to **Exam**, point to **Merge Queue**, and then click **Add to Merge Queue**.
4. Repeat the previous step for all studies that you want to work with.
5. Right-click one of the studies that you added to the merge queue, point to **Exam**, point to **Merge Queue**, and then click View **Merge Queue**.
6. Perform merge and split operations.

Create a teaching study

You can create a teaching study based on an existing DICOM study. The teaching study is anonymized.
1. In the worklist, find a DICOM study.
2. On the study shortcut menu, point to **Images**, and then click **Create Teaching Study**.
3. In the **Teaching Study** dialog box, in the **AE Title** list, click an **AE title**.
4. In the **New Value** column, type or select anonymous values for the new study, and then click **CREATE TEACHING STUDY**.

Reset a study

If the status of a study is beyond "Scheduled" in the study flow, you can reset the status to "Scheduled"

1. In the worklist, click the **ALL STUDIES** tab.
2. On a study shortcut menu, point to **Exam**, and then click **Reset Study**.
3. In the confirmation dialog box, click **YES**.

Delete a study

When you delete a study it remains on the worklist but Exa PACS/RIS applies strikethrough text formatting to it and disables access. You can undelete or purge a deleted study.

1. In the worklist, click the **ALL STUDIES** tab.
2. On a study shortcut menu, point to **Exam**, and then click **Delete Study**.
3. In the confirmation dialog box, click **YES**.
4. In the **Delete Reason** dialog box, select a reason and then click **SAVE.**

Download approved reports

If an approved report is attached to a study, you can download the approved reports directly from the worklist.

1. On the worklist, click the **ALL STUDIES** tab.
2. On a study shortcut menu, point to **Send Report** > **Download**, and then click the format of the report.
   Result: Exa PACS/RIS downloads the report to your Windows Downloads folder.

Assign critical findings to a study

You can assign critical findings to a study (for example, "Acute Positive").
Prerequisite: Define critical findings (see "Configure reason codes").

1. On the worklist, click the **ALL STUDIES** tab.
2. On the study shortcut menu, point to **Actions**, point to **Critical Findings**, and then click a finding.

Undelete or purge a deleted study

Undeleting a study removes the strikethrough text formatting and restores availability. *Purging* a study permanently removes it from the worklist and the database.

1. On the worklist, click the **ALL STUDIES** tab.
2. To undelete a deleted study, on the study shortcut menu, click **Restore Study**.
3. To purge a deleted study, on the study shortcut menu, click **Purge (Permanently)**, and then click **OK**.
4. To purge all deleted studies at once, on the **PACS Actions** menu, click **Purge All Deleted**.

Flag a study

You can flag a study in the worklist as being of special consideration, such as a case study. Users can filter the worklist by individual flags. To configure the flags that are available, see "Create a study flag."

1. On the worklist, click the **ALL STUDIES** tab.
2. On a study shortcut menu, point to **Actions**, point to **Flag**, and then click a flag.

Copy the API URL

If you need the API URL, you can copy it from the worklist.

1. On the worklist, click the **ALL STUDIES** tab.
2. On a study shortcut menu, point to **Actions**, and then click **Copy API URL**.
3. A message box appears with the **API URL**.

Reset a stack

To *reset* a stack means to restore its images to their last-saved ordering. It can also be helpful to reset the stack if any problems occur when displaying it in the viewer.

1. On the worklist, click the **ALL STUDIES** tab.
2. On the shortcut menu of a study that contains images, point to **Images** and then click **Reset Stack**.
3. In the confirmation dialog box, click **YES**.

Lock and unlock a study

You can lock a study to warn other users attempting to open it, and to prevent other users from using transcription. You can unlock a study that someone previously locked.

1. On the worklist, click the **ALL STUDIES** tab.
2. To lock a study, on the study shortcut menu, point to **Exam** > **Lock Study**.
3. To unlock a locked study, on the study shortcut menu, point to **Exam** > **Unlock Study**.

Edit a patient, study, or order

To edit a patient, study, or order you can access the edit study screen from the worklist by selecting the Edit Study, Edit Order, or Patient Information commands on the shortcut menu. For details, see topics under "Edit study screen."

View patient information

Use the Patient Information worklist shortcut command as a fast way to open the Patient Information tab of the edit study screen.

Change the priority of a study

You can assign or change the priority (for example, High, Low, or Lowest) of a study in the worklist. To configure priorities, see "Configure settings" under "Configure your company."

1. On the worklist, click the **ALL STUDIES** tab.
2. On the study shortcut menu, point to **Priority**, and then click a priority.

Change the study status

You can assign or change the status (such as Approved or Transcribed) of a study in the worklist. To configure the statuses that are available, see "Configure study flow."

1. On the worklist, click the **ALL STUDIES** tab.
2. On the study shortcut menu, point to **Change Status**, and then click a status.

Change the urgency of a study

You can assign or change the urgency (Stat 1–5, or Off) of a study in the worklist.

1. On the worklist, click the **ALL STUDIES** tab.
2. On the study shortcut menu, point to **Stat**, and then click a stat level.

Send a study

You can send a DICOM study to PACS or another destination. To configure destinations, see "Configure application entities."

1. In the worklist, on the **ALL STUDIES** tab, select one or more studies.
2. On the shortcut menu of one of the selected studies, click **DICOM Send**.
3. In the **Send Study** dialog box, to filter the list of available AEs, type at least one character in the filter box and then press **Enter**.
4. In the **Priority** list, select a priority.
5. Do one of the following.

- Click to select destinations in the list, and then click **SEND TO SELECTED**.

  Optional: To send any attached approved reports, select the **Include Approved Report** check box.

  - To send the study to all available destinations, click **SEND TO ALL**.

6. Optional. To manage in-process send jobs, see "Manage jobs in the transfer queue."

Send an approved report via Opal

You can send approved reports of DICOM studies to another Opal/Exa system.

Prerequisite: Ensure that the referring physician is configured on the sending server (your Exa PACS/RIS server) and receiving server. You may need to contact the receiving facility to confirm.

1. On the worklist, click the **ALL STUDIES** tab.
2. On the shortcut menu of a DICOM study, point to **Send Report** > **Send Report via Opal**.
3. In the **Send Report via Opal** dialog box, to filter the list of available AEs, type at least one character in the filter box and then press **Enter**.
4. In the **Priority** list, select a priority.
5. Select send destinations in the list.
6. Click **SEND TO SELECTED**, or **SEND TO ALL**.

Send an approved report via fax or email

You can send approved reports of DICOM studies via fax or email.

1. On the worklist, click the **ALL STUDIES** tab.
2. Select one or more DICOM studies containing reports you want to send.
3. On the shortcut menu of one of the selected studies, point to **Send Report** and then:
   - To fax to the default recipient, select it. The report is sent to the fax queue.
   - To send to selected recipients, click **Fax/Email**.
4. In the **Send Report** dialog box, select the recipient types and individual recipient, and then click the **SEND FAX** and/or **SEND EMAIL** button.
5. Optional. Repeat the previous step to send to additional recipients.

View and export audit logs

You can view audit logs, and export them to an XLS file.

1. In the worklist, on the study or order shortcut menu, click **Log**.
2. In the **Audit Log** dialog box, select a date range for the logs to view, and then click **RELOAD**.
3. If any logs match the date range, an entry appears in the list.
4. Optional. To export a log in the list, select it and then click **EXPORT TO EXCEL**.
5. To view information in a log, double-click the log entry in the list.

View documents attached to a study

You can view documents that are attached to a patient record.

1. In the worklist, click the **ALL STUDIES** tab.
2. On the study shortcut menu, click **Attach Files**.
3. Optional. To find a document, do one of the following.
   - To show all available documents, select the **Show All Documents** check box.
   - Use the search bar to find a document by type, source, or other criteria, and then click **RELOAD**.
   - To view a document in the list, double-click it.

About linking patients

Linking patients means to merge patients to the master patient record by using alternate account numbers (see "About alternate account numbers"). You can link patients from the worklist by following the procedure in "Link patients," or from the patient chart by following the procedures in "Use alternate account numbers." Note that the Link Patient procedure allows you to create a new account number "on the fly" whereas the other method does not.

Generally, you can use *linking* to merge patients, and use *merging* to move studies, series, and images between patients.

Link patients

If a patient has multiple records, each with different account numbers (or MRNs or PIDs), you can link them from the worklist. See also "About linking patients."

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Linking an external patient record to an internal one results in deleting the external record.
Prerequisite: Perform the procedures under "Configure alternate account number functionality."
1. On the worklist, on the shortcut menu of a study whose patient you want to link, click **Link Patient**.
2. In the **Link Patient** dialog box, in the **Alt Account No** search box, type the exact account number to link to the current account number, and then press **Enter**.
3. In the **Issuer** list, select the issuer of the PID, and then click **ADD**.
   Note: If the account number was found (it already exists in Exa PACS/RIS), a message appears. Type a different number or select a different issuer.
4. Click **SAVE**.

About attaching documents to patients, orders, and studies

The following is a list of topics in this manual that describe how to attach information to patients, order, and studies.

- **Upload a DICOM file to a study** - Attach existing DICOM files to a study.
- **Scan to a patient** - Scan paper or forms to a DICOM file and attach to the Documents section of the patient chart.
- **Scan to an order** - Scan paper or forms to a DICOM file and attach to all studies in an order.
- **Scan to a study** - Scan paper or forms to a DICOM file and attach to a selected study.

Upload a DICOM file to a study

You can upload DICOM-compatible files and add them to a study.
1. In the worklist, on the shortcut menu of a DICOM study, point to **DICOM Upload** and then click **Upload File**.
2. In the **DICOM Upload** dialog box, do the following.
   a. Select a series description.
   b. Click **SELECT FILES**, navigate to a file to upload, and then click **Open**.
   c. Click **UPLOAD**.

Open the call log

You can use the call log to save a record of communication to and from a patient regarding an appointment or order.
- In the worklist, on the shortcut menu of a DICOM study, click **Call Log**. The **Notes** tab of the patient chart opens. See "Update the patient call log."

Scan to a patient

You can scan paper documents and forms, and attach them to the patient chart. Exa PACS/RIS converts the scans to a DICOM-compatible format.

Prerequisite: Connect a TWAIN-compliant scanner, and install Exa Scans (see "Install Exa Scans").

1. In the worklist, on the study shortcut menu of an unread study, click **Attach Files**.
2. In the **Patient Documents** screen, select a document type.
3. Place a document in the scanner, and do one of the following.

   - To scan without scanning options, click the **QUICK SCAN** arrow button, and in the shortcut menu, click **QUICK SCAN TO PATIENT**.

   - To scan with scanning options, click the **QUICK SCAN** arrow button, and in the shortcut menu, click *FULL SCAN TO PATIENT*.

   - To upload the scan to the patient chart, click **UPLOAD**, and then in the second **Patient Document** dialog box, do the following.
     o Enter metadata for the document.
     o Click **SELECT FILES**, navigate to and select a file, and then click **Open**.

4. Click **SAVE.**

Scan to an order or study

You can scan an image to a DICOM file and attach the file to one or all studies in an order.

1. On the worklist, click the **ALL STUDIES** tab.
2. On the study shortcut menu, do one of the following.

   - To scan to the study, point to **DICOM Upload** and then click **Scan to Study**.

   - To scan to all studies in the order, point to **DICOM Upload** and then click **Scan to Order**.

Edit study screen

The edit study screen enables you to view or edit most information about an order or study. To open the edit study screen, click the edit button in a worklist study row. The topics in this section describe all of the tasks you can complete in the edit study screen.

Technologists: For you, clicking the edit button opens the Exam screen for technologists (see "Exam screen for technologists").
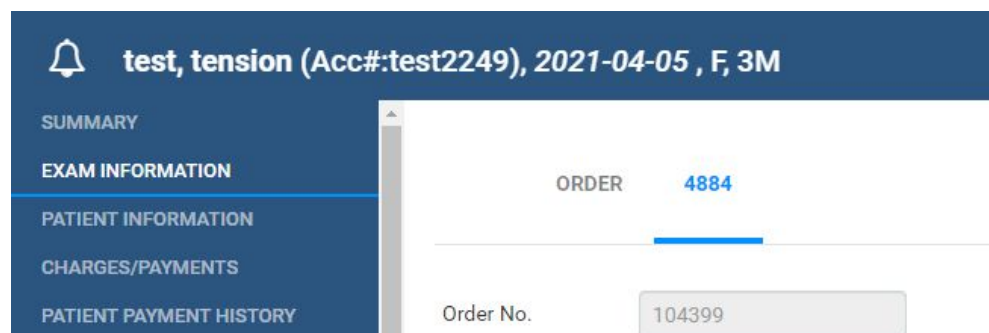
The upper left corner of the edit study screen

⚠ When working in the edit study screen, ensure that you enter all information correctly and with correct spelling. Incorrect information can result in failure to find patient records in future operations.

View patient alerts

You can view summary of patient alerts.

1. In the worklist, click the edit ✎ button of a study.
2. At the top of the edit study screen, click the alert 🔔 button.

View a summary of an order

You can view a summary of an order and its studies.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **SUMMARY**.

Edit order information

An *order* defines information for one or more studies. You can edit properties of an order.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **EXAM INFORMATION**.
3. Near the top of the screen, click the **ORDER** sub-tab and make changes to the following settings.

Setting	Description
Facility	The facilities performing the studies (to change, reschedule).
Modality	The modalities used for the studies (to change, reschedule).
Resource	The resources used for the studies (to change, reschedule).
Ordering Facility Location	Select the ordering facility location of the studies.
Patient Location	Select the current location of the patient.
Patient Room No.	Type the room number of the patient location.
Patient Condition	Select a patient condition to consider for studies (such as "wheelchair").
Source	Select the source of the patient (such as referral or previous medical facility).
Place of Service	Select the place of service for billing purposes (Box24B).
Supervising Physician	Select the supervising physician (Medicare requires a supervising physician to be present in the department or location during the exam).
Functional Status	Select the patient's functional status.
Cognitive Status	Select the patient's cognitive status.
Transition of Care in	[Unused]
Patient Visit No.	The enterprise-specific serial number number for the study.
SDE Study	Select the check box if the order contains an echo ultrasound-related study.
Schedule Notes	Type or select schedule notes (such as messages from the front desk).
Justification of Mobile Service	Type the justification of mobile service for reference by the physician.

Setting	Description
Technologist	Select the technologist performing the studies.
Discharge Instructions	Type any discharge instructions.
Physician Order Status	Status from the Referring Provider portal.
PRINT ORDER	To print a summary of the order information, select one or more of the following options, and then click PRINT ORDER.
Include Disclaimer/ Signature Area	Includes a pre-configured disclaimer to be signed by the patient.
Include Notes	Includes schedule and study notes on the printed order.
Include Barcode Page	Prints a barcode on the order.

4. If DICOM fields are not available to edit, at the bottom of the screen, click **DICOM STUDY**, and then make changes to DICOM fields as needed.
5. To edit or add CPT codes, at the bottom of the screen, click the edit ✐ or add ➕ button, enter changes, and then click **SAVE.**
6. Click **SAVE.**

Edit study information

You can edit properties of an ordered study, including DICOM fields and CPT codes.

1. In the worklist, click the edit ✐ button of a study.
2. In the edit study screen, on the left pane, click **EXAM INFORMATION**.
3. Near the top of the screen, click a study sub-tab (labeled with the accession number) and make changes to the following settings.

Setting	Description
Order No.	The order number to which the study belongs (to change, reschedule).
Accession No.	The accession number of the study (users with rights can edit here).
Study UID	The study UID as determined by the selected appointment type.
Date	The date of the study (to change, reschedule).
Study Status	The current status of the study in the Exa PACS/RIS study flow.
Body Part	Select the relevant body part for the study (for example, hand).
Orientation	Select which side of the body (for example, right).
Appointment Type	Select the study's appointment type (the type of exam for scheduling purposes).
Code	The internal procedure code of the study (associated with the appointment type).

Setting	Description
Modality Room	The modality room where the study is performed (to change, reschedule).
Reason	Type the patient-specific reason for performing the study.
Study Notes	Type or select study notes (such as basic study history or notes from technologist to radiologist).
Diagnosis Codes	Select diagnosis (e.g. ICD10) codes for the study.
Referring Physician	Select the physician who referred the patient for the study.
Ordering Physician	Select the physician who ordered the study. If left blank, Exa PACS/RIS automatically enters the referring physician.
Reading Physician	Select the radiologist or other physician who will read the study.
Attorney	Select the attorney for the patient. This attorney is given access to the study through Attorney Portal.
Department	Type the department of the facility performing the study.
Institution	Type the institution of the facility performing the study.
Station	Type an identifier for the station of the location performing the study.

4. If DICOM fields are not available to edit, at the bottom of the screen, click **DICOM STUDY**, and then make changes to DICOM fields as needed.
5. To edit or add CPT codes, at the bottom of the screen, click the edit ✎ or add ➕ button, enter changes, and then click **SAVE.**
6. Click **SAVE.**

Edit basic patient demographics

The edit study screen gives you convenient access to some patient demographics in the patient chart. For a description of the settings, see "Create and modify a patient chart."

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **PATIENT INFORMATION**.
3. Make changes, and then click **SAVE.**

Add or edit a patient's portal account

You can edit a patient's portal credentials and other account information.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **PATIENT INFORMATION**.
3. At the top of the **Patient Information** area, click **PORTAL CREDENTIALS**.
4. In the **Create Portal Account** dialog box, do the following.
   a. Under **Patient Account**, edit fields as needed.
   b. Under **Representative Account**, to assign a representative account (such as for a relative), select the account in the list.
   c. To create a new representative account, click the plus ➕ button, fill in the fields and click the save button.
   d. Click **CREATE**.
5. Click **SAVE.**

View, download, and transmit clinical summaries

You can view, download, and transmit any clinical summaries entered for a patient.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **PATIENT INFORMATION**.
3. At the top of the **Patient Information** area, click **CLINICAL SUMMARY**.
4. In the **Clinical Summary Transmit** dialog box, find a clinical summary in the list.
5. On the toolbar on the left side of each row, do one or more of the following.
   - Click the view button to open the summary in a dialog box.
   - Click the download button to download the summary as a PDF to the Windows Downloads folder.
   - Click the transmit button to send the summary to an email address that you specify.

Scan a patient's driver's license

You can search for a patient by the name and DOB on their driver's license. If Exa PACS/RIS finds a matching patient in the system, it opens a dialog box in which you can reconcile that record against the information on the license. If it does not find a matching patient, it uses the information on the license as a basis for you to create a new patient.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **PATIENT INFORMATION**.
3. At the top of the **Patient Information** area, click **SCAN LICENSE**.
4. When the **Scan License** dialog box appears, scan the driver's license.
5. Relevant information appears in fields.

View and print a patient claim inquiry

You can view and print a patient claim summary.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **PATIENT INFORMATION**.
3. At the top of the **Patient Information** area, click **INQUIRY**.
4. Optional. In the **Patient Claim Inquiry** dialog box, click **PRINT**.
   A printable claim summary appears in a separate browser window.

Generate a patient check-in code

You can generate a code that the patient can use to check-in for an exam when using Patient Kiosk. See "Use Patient Kiosk as a patient."

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **PATIENT INFORMATION**.
3. At the top of the **Patient Information** area, click **CHECK-IN CODE**.
4. The check-in code appears in a dialog box.
5. Optional. Click **COPY TO CLIPBOARD**, and then paste the code in an email to send to the patient.

Export a patient CCD

A patient CCD (continuity of care document) contains medical information that you can send to other providers without loss of meaning. You can export the information, download it to your Windows Downloads folder, and send it to an email recipient.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **PATIENT INFORMATION**.
3. At the top of the **Patient Information** area, click **EXPORT CCD**.
4. In the **Export CCD** dialog box, select type and encryption functions.

5. Click **PROCESS PATIENT INFO**, and then click **DOWNLOAD**.
6. To send the zipped file, click **SEND** and follow the on-screen instructions.

Enter a new charge

You can modify charges from the edit study screen. For more details on entering charges, see "Work with billing."

1. the worklist, click the edit ✐ button of a study.
2. In the edit study screen, on the left pane, click **CHARGE/PAYMENTS**.
3. Edit settings for an existing charge, or click **NEW CHARGE**, enter charge information, and then click **SAVE.**
4. Click **SAVE.**

Enter payments and print receipts

You can enter payments, print receipts, and create an invoice for the balance due from the edit study screen. For more details on entering payments, see "Work with billing."

1. In the worklist, click the edit ✐ button of a study.
2. In the edit study screen, on the left pane, click **CHARGE/PAYMENTS**.
3. Click **NEW PAYMENT**, enter payment information, and then click **SAVE.**
4. Optional. To print a receipt, click **PRINT RECEIPT**.
5. Click **SAVE.**

View payment history and print receipts

You can view a history of payments made on behalf of the current patient, and print receipts.

1. In the worklist, click the edit ✐ button of a study.
2. In the edit study screen, on the left pane, click **PATIENT PAYMENT HISTORY**.
3. Select a payment for which to print a receipt, and then click **PAYMENT RECEIPT**.

Add or edit an insurance profile

An insurance profile contains all relevant information about an insurance policy. When you set up multiple insurance profiles for a patient, you specify each as either the primary, secondary, or tertiary policy. Create a profile for each insurance policy the patient may use.

1. In the worklist, click the edit ✐ button of a study.
2. In the edit study screen, on the left pane, click **INSURANCE PROFILE**.
3. In the editing pane, click **ADD**, and then enter the following settings.

Setting	Description
Level	Select whether the insurance is the patient's primary, secondary, or tertiary policy.
Existing Insurance	If insurance was entered for the patient previously, you can select it here to automatically fill in other fields.
Insurance Carrier	Select the insurance carrier.
Insurance Provider Type	Entered automatically.
Policy Number	Type the patient's insurance policy number.
Group No.	Type the insurance group number of the policy.
Pre-Cert. Phone / Fax	Type contact information getting pre-certification.

Setting	Description
Accept Assignment	Select if the insurance policy can accept assignments.
Address / Phone No.	The contact information of the insurance carrier.
Website	The website of the insurance carrier.
Group Name	Type the name of the insurance group.
Valid From/To Date	Select the period during which the current policy is effective.
Medicare Ins. Type	Select the Medicare insurance type of the policy.
Relationship	Select an emergency contact person for the patient.
Subscriber Name	Type the name of the insurance policy subscriber.
Sex	Select the sex of the subscriber.
Address	Type the address of the subscriber.
DOB	Select the date of birth of the subscriber.
Employee Status	Select the employment status of the subscriber.
Work / Home Phone	Type the phone numbers of the subscriber.
Study CPT	Select the CPT of the patient's study needing authorization.
Referral Number	Type the referral number of the study needing authorization.
Note / Reason	Type notes and reasons for the study needing authorization.
Authorization No.	When authorized, type the authorization number.
Expiration / Effective / Issue Date	Select authorization dates.
Accident Date	Select the date of the accident, if applicable.
Accident Type	Select the type of accident.
Accident State	Select the state or province in which the accident occurred.

4. Click **SAVE.**

View or add patient documents

You can view all documents attached to a patient record and their metadata, and add new documents.

1. In the worklist, click the edit 🖉 button of a study.
2. In the edit study screen, on the left pane, click **DOCUMENTS**.
3. To view a document in the list, double-click it.
4. To add a document, place the document in the scanner, and do one of the following.
5. To scan one page without scanning options, click **QUICK SCAN**.
6. To scan with scanning options, click the **QUICK SCAN** arrow ⯆ button, and in the shortcut menu, click a scan type.
7. To upload the scan to RIS, click **UPLOAD**, or click the arrow ⯆ button for a patient level document, and then in the second **Patient Document** dialog box, do the following.
   - Enter metadata for the document.

- Click **SELECT FILES**, navigate to and select a file, and then click **Open**.
8. Click **SAVE.**

View approved reports

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **APPROVED REPORTS** to open a window and display the report.

Open the transcription screen

Use this procedure to open the transcription multi-panel from the edit study screen. For more advanced features, see "Dictation and transcription with Exa Trans2."

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **TRANSCRIPTION** to open a window and display the transcription editor within the multi-panel.

Manage other physicians

You can add or delete other physicians (ones other than the primary, referring, or reading physicians) who are associated with the current study.

1. On the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **OTHER PHYSICIANS**.
3. Optional. To add a physician, in the **Select Other Physician** list, select a physician.
4. Optional. To remove a physician, click the trash 🗑 button.

Enter notes and reason for study

You can enter patient notes, study notes, schedule notes, and reasons for the patient's studies. Generally, you can use: *patient notes* for patient specific information; *study notes* for basic study history or notes from technologist to radiologist; *schedule notes* for messages from the front desk; and *reason notes* for more specific study history.

CAUTION: Notes are permanent, and may be visible to the patient.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **NOTES**.
3. Select the **PATIENT NOTES**, **STUDY NOTES**, or **SCHEDULE NOTES** sub-tab.
4. Click **ADD**, type notes, and then click **SAVE.**
5. Select the **REASON FOR STUDY** tab.
6. Type reasons in the box, and then click **SAVE.**

Update the patient call log

You can use the call log to save a record of communication to and from a patient regarding an appointment or order. The worklist has columns for displaying the following information that you enter in the call log: last call made, last call category, and last call notes. To add call categories, see "Configure app settings." To update the call log:

1. In the worklist, click the edit ✎ button of a DICOM study.
2. In the edit study screen, on the left pane, click **NOTES**.
3. On the **CALL LOG** sub-tab, click **ADD**.
4. In the **Call Category** list, select a call category.
5. In the **Call Note** box, type notes, and then click **SAVE**.

Enter employment and transfer-related information

You can enter various information on whether the illness or injury was employment-related, the dates of illness, work absence, and hospitalization. You can also enter information related to the source of a transferred patient.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **ADDITIONAL INFORMATION**.
3. Enter the information as needed and then click **SAVE.**

Assign or remove patient alerts

⚠ Failure to add a needed patient alert could result in incorrect treatment or diagnosis.
You can assign or remove alerts for a patient.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **PATIENT ALERTS**.
3. Select or clear the check boxes corresponding to the alerts that you want to assign or remove.
4. Optional. To create a new alert, type it in the **Custom Alerts** box and then click the plus ➕ button.
5. Click **SAVE.**

Add allergy information

You can add information about a patient's allergies.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **ALLERGIES**, and then click **ADD**.
3. Add the information as needed.
4. Click **SAVE.**

View problems

You can view problems associated with the study.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **PROBLEMS**.

View prior studies and add a new study

You can view a list of prior studies for a patient, and view reports attached to the priors. You can also start the workflow to add a new study from this part of the edit study screen.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **STUDIES**.
3. Optional. If a prior study includes reports, click the reports 🗐 button on the study row to open the reports.
4. Optional. To add a new study, click **NEW STUDY** and then see "Schedule exams."

About custom forms and study forms

Custom forms have basic formatting options, and cannot accept electronic signatures. *Study forms* have more advanced formatting options, and can accept electronic signatures.

Add a custom form to a patient record

You can open a custom form template, fill it out, save the completed form to the current patient record, sign it electronically, fax, and print it.

1. In the worklist, click the edit ✎ button of a study.

2. In the edit study screen, on the left pane, click **CUSTOM FORMS**.
3. In the **Select Custom Forms** list, select a form to add it to the forms table.
4. Click the form 🗎 button in the table to open it, edit it as necessary, and then click **SAVE.**
5. Optional. To add an electronic signature, click **SIGNATURE**, enter signature information, sign by drawing with the mouse, and then click **SAVE.**
   Note: To make electronic signatures available, add a signature merge field when setting up the form.
6. Optional: To print the form, click **PRINT**.
7. Optional: To fax the form, click **FAX**, select the recipient physician, enter optional information under **Other**, and then click **SEND FAX**.

Add a study form to a patient record

You can open a study form template, fill it out, save the completed form to the current patient record, sign it electronically, and print it. You can also make forms available on the patient portal so that they can fill them out before an appointment.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **STUDY FORMS**.
3. In the **Select Study Forms** list, select a form to add it to the forms table.
4. Double-click the form in the table to open it, edit it as necessary, and then click **SAVE.**
5. Optional. To add an electronic signature, click **ADD SIGNATURE**, enter signature information, sign by drawing with the mouse, click **SAVE** or **SAVE TO PATIENT DOCUMENTS**, and then close the signature dialog box.
6. Close the form.
7. Optional: To print forms in the list, select their check boxes and then click **PRINT SELECTED**.
8. Optional: In the forms table, next to the **Patient Portal** column header, select the check box to make the forms available in the patient portal.

Specify a follow-up exam

If a patient needs a follow-up exam, you can specify the need for the follow up and the general time frame. To schedule follow-up exams, see "Schedule a follow-up."

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **FOLLOW UP**.
3. In the **Follow Up** column, select a reason for the follow-up.
4. In the **Next Follow-Up** column, select a time horizon for the follow-up.
5. Click **SAVE.**

Refer a patient

You can refer a patient to a provider, and view existing referrals.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **REFERRALS**.
3. In the upper-right part of the editing pane, click **ADD.**
4. Enter referral information and then click **SAVE.**
5. To send the referral to the provider, click **SEND**, enter message information and attach documents, and then click **SEND**.

View activity logs

You can view a log of program activity and export the log to Excel.

1. In the worklist, click the edit ✎ button of a study.
2. In the edit study screen, on the left pane, click **ACTIVITY LOG**.
3. Change the range of dates to filter the activity that you want to view.

4. Optional. To export the longs, click **EXPORT TO EXCEL**.

Exam screen for technologists

Technologists, users linked to a technologist, and facility administrators can automatically open a technologist-specific version of the Exam screen that helps them work more efficiently.

Link a user to a technologist

You must link a user to a technologist resource to enable that user to view the exam screen for technologists.

Prerequisite: Add the Technologist right to the user's user role (see "Create a user role").

1. On the burger ☰ menu, click **SETUP.**
2. Next to the burger button, click the word in all caps, and then click **Providers & Resources**.
3. On the **RESOURCE** tab, create a technologist resource, or open an existing one.
4. On the **LOGIN DETAILS** sub-tab, select the user to link to the technologist, click **LINK USER**.

Use the exam screen for technologists

Prerequisite: Link the current user with a technologist (see "Link a user with a technologist"). Sign in to Exa PACS/RIS as a technologist.

1. To open the exam screen for technologists (the Technologist screen), open a worklist study for editing in the normal manner (open the edit study screen).
2. Proceed with technologist workflow in the Technologist screen. The screen is self-explanatory, but note the following major features.

   - Information fields – In the left pane, edit information in all fields as necessary.
   - **TECH START/PAUSE/END** buttons – Click TECH START and TECH END upon starting and ending the exam. You can click TECH PAUSE when an exam is interrupted, such as by a difficult patient. Exam duration statistics are recorded based on the times these buttons are clicked, and used in reporting.
   - UNREAD – Click to reset the study's status to Unread.
   - Notes – You can click Study Notes, Schedule Notes, Patient Notes, or Reason for Study, type notes in the box, and then click SAVE.
   - Documents – Click to view or add documents to the study.
   - Studies – Click to view a list of prior studies for the current study.
   - Study Forms – Click to add, edit, or delete study forms from the study.
   - **ABORT** – Click to abort the study.
   - **ADD CHARGES** – Add new charges to an exam (see, "Add charges in the Technologist screen").

Add charges and NDCs in the exam screen for technologists

Technologists can add charges to an exam if needed for such things as when contrast is used. The charges correspond to CPT codes, and any associated NDC codes.

1. Open a study in the Technologist screen (see "Use the exam screen for technologists"), and then click **ADD CHARGE**.
2. In the **Add Additional Charges** dialog box, click **ADD CHARGE**.
3. In the **CPT Code** column, select the CPT code for the additional charge.
   Note: Alternatively, you can select the CPT Description.
4. Optional. In the **NDC** column, click the add ⊕ button, and then search for a code to add in the **Search NDC Codes** list.
5. Modify the following settings as necessary.

Setting	Description
NDC Package Code	Type the code from the manufacturer.
Strength	Type the strength of the active ingredient, then select the units of strength in the list.
Unit of Measure	Type the unit of measure.
Lot Number	Type the lot number of the drug.
Amount Used	Type the amount of drug administered.
Route	Select the administration method for the drug.
Needle Gauge	If a needle was used, select the gauge.
Reaction	Select if any reaction occurred.
Package Description	Type the description of the package from the manufacturer.
Labeler Name	Type the name of company corresponding to the labeler code segment in the Product NDC.
Expiration Date	Type the expiration date of the drug.
Units	Type the number units (e.g. vials) used.
Admin Site	Select the site where the drug was administered.
Administered By	Select the person who administered the drug.

6. Click **SAVE**.

Dictation and transcription with Exa Trans2

You can dictate findings in Exa Dictation and transcribe them in Exa Trans2 (formerly Web Trans). Exa Trans2 features a multi-panel interface with advanced functionality. If your configuration includes Exa Trans and Dragon, see also "Dictation and transcription with Exa Trans").

Turn on Exa Dictation and Exa Trans2

Depending on your installation configuration, you must turn on Exa Dictation and Exa Trans2 before using them by following the steps below.

1. On the worklist, click the settings ⚙ button, and then in the button shortcut menu, click **User Settings**.
2. On the right side of the screen, under **Voice recognition**, click **Dictation**.
3. Click **SAVE.**

Dictate a study

Exa Trans2 transcription editor does not currently support dictation, but radiologists can use the following procedure to record dictation without simultaneous transcription (while Dragon is OFF). This feature uses a dictation toolbar 🎤 « ▶ » ⬆ with record, rewind, play/pause/stop, fast forward, and upload buttons.

1. In the worklist, double-click an unread study to open it in the viewer.
2. On the dictation toolbar, click the record 🎤 button, and then dictate your findings.
   Note: If needed, you can click pause during dictation.
3. When finished, click the stop button.

4. To review your dictation, rewind the recording and then click the play button.
   Note: You can record over parts of your dictation that you want to change.

5. When you are satisfied with the results, click the upload ![upload] button to add your dictation to the study.
   Note: Skip this step if you selected Auto Upload Dictation on Close (see "Configure autosave options").

Open and organize Exa Trans2

The Exa Trans2 window contains dedicated panels for managing transcription, notes, documents, and prior reports.

Prerequisite: Turn on Exa Dictation and Exa Trans2.

1. In the worklist, find an unread study and click its multi-panel transcription ![button] button.
2. In the Exa Trans2 multi-panel, on the toolbar, click one or more of the following buttons:

1   Open or close **all** panels
2   Open or close the **Notes** panel
3   Open or close the **Documents** panel
4   Open or close the **Prior Reports** panel

3. Drag panels within the Exa Trans2 screen to reposition them.

Edit and approve transcriptions in Exa Trans2

The Exa Trans2 transcription editor does not currently support dictation playback, but you can edit and approve submitted transcriptions.

Prerequisite: Turn on Exa Dictation and Exa Trans2.

1. On the worklist, in the relevant study row, click the multi-panel ![button] button.
2. In the **Transcription editor** panel, review the transcription, make any needed changes, and then click **Save**.
3. Click **Approve** or **Approve & Next**.
4. In the **Providers** dialog box, select the approving provider and click **Approve**.

Enter notes in Exa Trans2

You can add study notes and reasons for study in the Notes panel of Exa Trans2.

1. On the worklist, in the relevant study row, click the multi-panel ![button] button.
2. In the multi-panel, open the **Notes** panel.
3. In the **Notes** panel, click the **STUDY NOTES** or **REASON FOR STUDY** tab.
4. If entering a study note, select a study date.
5. Type notes in the space provided, and then click **SAVE**.

Manage documents in Exa Trans2

You can view all documents attached to a study in the Documents panel of Exa Trans2. The Documents panel displays up to two documents at once, and you can select which documents to display.

1. On the worklist, in the relevant study row, click the multi-panel ![button] button.
2. In the **Documents** panel, click the document buttons to show or hide currently open documents in viewing frames.
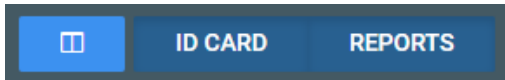
The buttons labels indicate the document selected for viewing, the default document type set by the user in the panel, or the last-viewed document types

3. If more than two documents are available, you can open a new one by dragging a document metadata block from the top of the panel into a document viewing frame.

Manage prior reports in Exa Trans2

You can view, download, and print prior reports from the Prior reports panel of Exa Trans2.

1. On the worklist, in the relevant study row, click the multi-panel button.
2. In the **Prior reports** panel, in the left pane, click the block of metadata corresponding to the report that you want to view.
3. To download or print the report, in the right pane, point to the report, and then click the download or print button in the toolbar that appears.

Dictation and transcription with Exa Trans

With Exa Trans, you can dictate and transcribe simultaneously with Dragon voice recognition. Alternatively, you can dictate findings in Exa Dictation and transcribe them manually. To use the features of the Exa Panel for transcription related tasks, see "Dictation and transcription with Exa Trans2."

Turn on Exa Trans

You must turn on Exa Trans before using it by following the steps below. You turn on Exa Trans indirectly by turning on the Dragon speech-to-text option in the user settings.

Prerequisite: Install Exa Trans (see appendix).

1. On the worklist, click the settings button, and then in the button shortcut menu, click **User Settings**.
2. On the right side, under **Voice recognition**, click **Dragon**.
3. Click **SAVE.**

Dictate and transcribe a study

With the integrated Dragon speech-to-text application, you can use Exa Trans to dictate and transcribe findings simultaneously.

Prerequisite: Turn on Exa Trans.

1. In the worklist, find an unread study and click its transcription button.
2. In the **Exa Trans** window, in the **Templates** list, click a template.
3. Optional. To use a voice command, with the **Templates** list open, say, "Macro [*template name*]".
4. Place the cursor where you want to add text.
5. On the Dragon toolbar, click the record button, and then begin dictating. Click stop when finished.
6. Click **Save**.

Edit and approve transcriptions

You can edit and approve saved transcriptions by using the features within Dragon.

Prerequisite: Turn on Exa Trans.

1. In the worklist, click the transcription button of a dictated study.
2. In the editing screen, review the transcription, make any needed changes, and then click **Save**.
3. Click **e-Sign & Approve**, or **Approve and Next**.

Add a dictation or transcription addendum

After approval, transcriptions cannot be edited. However, physicians and transcriptionists can add addendums in order to correct mistakes or insert new information.

Prerequisite: Turn on Exa Trans.

1. In the worklist, click the transcription 🗐 button of an approved study.
2. To add a *dictation* addendum, repeat the steps in "Dictate a study."
   Exa PACS/RIS reverts the status of the dictation from Approved to Dictated.
3. To add a *transcription* addendum, click **Add Addendum**.
4. Type new text, and then click **Addendum Save**.
5. If not using Dragon, click **Addendum Submit for Review**.
   Exa PACS/RIS reverts the status of the dictation from Approved to Transcribed.

About using Exa Trans and Exa Trans2

Exa Trans and Exa Trans2 (with the multi-panel) are designed to work in sync. Exact behavior depends on various user rights, actions, and settings, as in the following examples.

Action/Condition	Effect
Close Exa Trans	Also closes Exa Trans2
Exa Trans2 rights assigned	Exa Trans2 available
Exa Trans rights assigned	Exa Trans available only if the Dragon user setting is also turned ON.
Auto-Open Orders + "Documents" selected	If an order auto-opens, the Documents screen auto-opens.
Auto Open Orders enabled AND Viewer Settings > General > Display Settings > Monitor 1 = Documents	Documents auto-open in the Documents screen of the multi-panel in Monitor 1.
Auto Open Orders disabled AND Viewer Settings > General > Display Settings > Monitor 1 = Documents	Documents do not auto-open, but if manually opened, they open in the multi-panel in monitor 1.
Exa Trans and Exa Trans2 enabled within Auto Open Orders	Exa Trans and Exa Trans2 both open when an order auto-opens. You can configure which monitor they open in in the Display Settings, or leave blank to open in the main monitor.
Exa Trans set to auto-open AND Exa Trans2 not enabled in Auto Open Orders	Only Exa Trans opens when a study opens (but you can still manually open Exa Trans2).
Set Exa Trans or Exa Trans2 to open on a specified monitor	Manually opening Exa Trans or Exa Trans2 opens it in the specified monitor.
Exa Trans2 set to auto open in Auto Open Orders, but not Exa Trans	Exa Trans2 auto opens when the viewer is opened, in the specified monitor, if so configured.

Action/Condition	Effect
User clicks the Exa Trans or Exa Trans2 button on the worklist	Exa Trans or Exa Trans2 opens on the same monitor as the worklist.
Exa Trans Esign & Approve	Study is approved, viewer closes, Exa Trans minimized.
Exa Trans Approve & Next	Study is approved, viewer and Exa Trans open with next available study.
Exa Trans Not Approve	Study status changes to Not Approved, viewer closes, and Exa Trans minimizes.
Exa Trans Skip	Study stays in Unread status, viewer and Exa Trans open with the next available study
Exa Trans Save	Study status changes to Draft, viewer and Exa Trans remain open with current study
Exa Trans Pre Approve	Study status changes to Pre-Approved, viewer closes, and Exa Trans minimizes
Exa Trans and Exa Trans2 Esign & Approve	Exa Trans closes, Exa Trans2 minimizes or closes
Exa Trans and Exa Trans2 Approve & Next	Study status changes to Approve, viewer, Exa Trans, and Exa Trans2 open with the next available study
Exa Trans and Exa Trans2 Not Approve	Study status changes to Not Approved, viewer, Exa Trans, and Exa Trans2 minimize or close.
Exa Trans and Exa Trans2 Skip	Study status remains Unread, the viewer, Exa Trans, and Exa Trans2 open the next available patient or study.
Exa Trans and Exa Trans2 Save	Viewer, Exa Trans, and Exa Trans2 remain open. If the user closes the viewer, Exa Trans and Exa Trans2 also close.
Exa Trans and Exa Trans2 Pre Approve	Study status changes to Pre-Approved, viewer and Exa Trans2 close.

QC operations

All DICOM studies from other AEs initially appear on the QC tab, and are automatically evaluated for conflicts with PACS studies, RIS orders, and other data based on user-defined receiver rules (see "About receiver rules"). The topics in this section describe how to resolve conflicts.

Sort studies by QC status

To find conflicts needing reconciliation more easily, you can sort studies in the QC tab of the worklist by their QC status.

Prerequisite: Show the QC tab. To view only conflicts in the QC tab, click **Settings** > **User Settings**, and then clear the **Show Completed in Pending List** check box.

1. In the worklist, click the **QC** tab.
2. On the search bar, click inside the **STATUS** box.
3. On the shortcut menu, click a status (such as "Conflicts") and click **APPLY FILTER**.

Reconcile conflicts by matching to a RIS order

To reconcile conflicts, start by trying to match the conflicting study to a RIS order.
Prerequisite: Show the QC tab (see "Configure other user settings").

1. In the worklist, click the **QC** tab.
2. Find a study whose status is **Conflicts**, and in its shortcut menu, click **Reconcile**.
3. In the **Reconcile** dialog box, under **Suggestions** or **RIS Orders**, find an order in the list that matches the details listed under **Current Study**, and then click its **SELECT** button.
   Note: If a matching order does not appear in the list, you can try using the search bar.
4. In the confirmation dialog box, click **OK**.
5. Confirm that the study no longer has a status of **Conflicts**.

Reconcile conflicts by manually editing demographics

If you can find a RIS order that should match the conflicting study but does not, it may be due to errors in the patient name, account number, or other information in the conflicting study. If you know this to be the case, you can edit the demographics of the conflicting study to match the RIS order.
Prerequisite: Show the QC tab (see "Configure other user settings").

1. In the worklist, click the **QC** tab.
2. Find a study whose status is Conflicts, and click its edit ✎ button.
3. In the **Manual Edit** dialog box, edit demographics as necessary and then click **SAVE.**
4. Confirm that the study no longer has a status of Conflicts.

Reconcile conflicts by creating an order

If you cannot find a RIS order that matches or should match a conflicting study, you can reconcile by creating a new order that matches.
Prerequisite: Show the QC tab (see "Configure other user settings").

1. In the worklist, click the **QC** tab, and then find a study whose status is **Conflicts**.
2. Create an order for the conflicting study by following the steps in "A typical scheduling workflow."
3. On the **QC** tab, in the conflicting study's shortcut menu, click **Reconciliation**.
4. In the **Reconciliation** dialog box, under **RIS Orders**, find the order you just created and click its **SELECT** button.
5. Confirm that the study no longer has a status of Conflicts.

Move QC studies to the All Studies tab

You can move a study in the QC tab to the All Studies tab without reconciling.
Prerequisite: Show the QC tab (see "Configure other user settings").

1. In the worklist, click the **QC** tab, and then find a study that you want to move.
2. In the study's shortcut menu, click **Move to All Studies**.

Work with the Exa PACS/RIS viewer

Standard viewing tasks

Open a study in a viewer

In this manual, *viewer* refers to the Exa PACS/RIS viewer unless otherwise specified. To open a study, on the worklist, do one of the following:

- To open in the viewer, click the ⊕ button of a study
- To open in the Opal viewer, click the 👁 button of a study.
- To view a different image, on the left pane, double-click a thumbnail.

  Note: Additionally, you can configure Exa PACS/RIS to open studies in the viewer when you double-click them. Follow the steps in "Miscellaneous user settings" to configure the Double click behavior setting.

⚠

CAUTION: Check for the presence of the lossless indicator in the lower-left corner of the image frame before proceeding with a diagnosis. If you adjust the image, wait until the lossless indicator turns green before diagnosis.

The red lossless indicator means the image has not yet fully loaded.

View tomographic studies with CAD findings

The Exa PACS/RIS Viewer supports 2D CAD findings for mammography and 3D tomographic series. Findings are displayed as overlays. You can open and manipulate studies that include 3D CAD data in the normal manner, and use the following.

- To jump through images in BTO/tomosynthesis series that include 3D CAD findings, configure a keyboard shortcut:

  Worklist > **Viewer Settings** > **Tools** > **Keyboard shortcuts** > **CAD – BTO Jump to Next Finding**

- See "Enable CAD Findings on All BTO Images"
- See "Display CAD Findings Scoring"

View priors with the Prior bar

If priors are included in a study that you open, you can view them by using the Prior bar. To show the Prior bar in the viewer, configure the Use Modified Toolbar setting (see "Configure other interface settings").
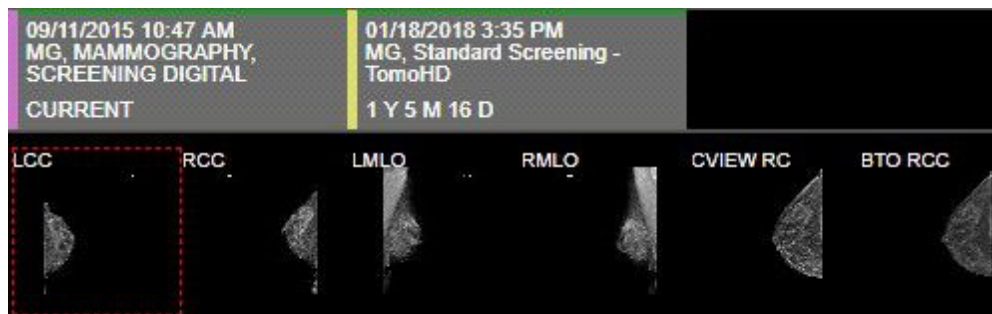
The Prior bar contains the current and prior studies on the top row, and their image thumbnails on the bottom row (see figure). The study boxes show the age of the study, and depending on configuration, let you do one or more of the following:

- Point to or click a study to display its thumbnails.
- Double-click the study to open it (for example, the right box in the top row of the figure).
- Double-click a thumbnail to open the image or series.
- If a report is included, click its symbol to view.

Send an image from the viewer

You can send the current image in the viewer to an application entity. If the image includes annotations, those annotations are included with the image according to the method you specify in the **Send Annotations as** setting (see "Configure application entities").

1. Open an image in the viewer.
2. Right-click the image and click **Send Image/Annotation**.
3. In the Send Study dialog box, in the bottom pane, select one or more AEs
4. Click **SEND TO SELECTED** or **SEND TO ALL**.

DICOM-print a study

You can print the currently viewed image to a preconfigured DICOM printer. The current image prints, including any displayed annotations and overlays.
Note: You cannot print multi-frame MR/CT or MG tomography images, or US echocardio series.
Prerequisite: Enable the DICOM Print shortcut menu command (see "Add or remove tools from the image shortcut menu").

1. Open a study in the Exa PACS/RIS viewer, right-click any image, and then click **DICOM Print**.
2. In the **DICOM Print** dialog box, in the **Printer** list, select a printer.
3. Enter the following remaining settings.

Setting	Description
Annotations	Select to include annotations, or clear to exclude.
W/L (Default)	Select to print the image with its original window/level settings. Clear to select the current window/level setting.
Overlay Text	Select to include the DICOM overlay (as per-image detail), or clear to exclude.
Selected Image Selected Series Current Page All Images	Select to print the selected image, selected series, current page of images, or all images.
Prev / Next	Click to move through pages of the print preview.
Printer	Select a printer (selected earlier in this procedure).
Configuration	Select a printer profile.

4. Click **DICOM Print**.

Configure the viewer

In the Viewer Settings dialog box, you can configure a wide variety of viewer options including display, interface, modality, toolbars, and shortcut menus. For details on operations in the Viewer Settings dialog box, see other topics in this section. There are two ways to open the Viewer Settings dialog box.

- In the worklist, on the upper toolbar, click the settings ⚙ button, and then in the button shortcut menu, click **Viewer Settings**.
- In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.

Set up connected displays

Configure all connected monitors that you intend to use with Exa PACS/RIS. These settings act as default behavior for what study items open in which monitor. If DMs conflict with the settings you enter here, the DM takes precedence.

Prerequisite: Install the Multi-Screen Presentation extension in Google Chrome.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **GENERAL**.
3. Under **Display Settings**, in the **Monitors on System** box, click the update ↻ button to update the monitor count (or enter manually), and then click the identify 👁 button.
4. In the table of monitors, enter the settings below.

   Note: At any time you can click the update ↻ button to preview your changes.

Setting	Description
Monitor	Select to make monitors available for *image* viewing. To display orders and studies on the monitor, clear this option.
Current	Select to make monitors available to display current studies.
Prior	Select to make monitors available to display prior studies, if available.
Full Screen	Select to default to full screen view.
Orders	Select a section of the patient chart to open in the corresponding monitor when manually opening that section with a viewer tool, or when configured to open automatically. **For example:** If you select **Document** in the **Orders** list for **DISPLAY2**, the Document section of the patient chart will appear in DISPLAY2 when you click the button in the viewer.
Type	The color or grayscale display type.
Calibration Width/mm	Type a manual calibration width (appears on horizontal calipers)
Calibration Height/mm	Type a manual calibration height (appears on vertical calipers)

5. Click **SAVE.**

Configure autosave options

You can configure how the viewer performs automatic saving and other functions.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting button.
2. In the **Viewer Settings** dialog box, in the left pane, click **GENERAL**.
3. Under **Autosave Options**, enter the settings in the table below.

Setting	Description
Autosave Image Properties on Close	Automatically saves image properties such as the W/L when the image is closed. Saved properties are restored the next time the image is opened.
Autosave Image Annotations on Close	Automatically saves image annotations when the image is closed. Saved annotations are restored the next time the image is opened.
Auto Mark Read Study on Close	Automatically marks the study as "Read" when the study is closed.
Auto Upload Dictation on Close	Automatically uploads recorded dictations to add to the study when the study is closed.
Autosave Viewer Settings on Close	Automatically saves any changed viewer settings such as toolbar configuration when closing the viewer.
Auto Open Next Study	Automatically opens the next study in the worklist when the current study is closed.

Setting	Description
Auto Send Annotated Images on Close	Automatically sends images if they include annotations when the current study is closed.

4. Click **SAVE.**

Configure the toolbar

You can configure the appearance and other properties of the viewer toolbar. For additional toolbar settings, see "Configure other interface settings."

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **INTERFACE**.
3. Under **Toolbar**, enter the settings in the table below.
   Note: You may need to update the viewer for changes to take effect.

Setting	Description
Toolbar Button Scale	Adjusts the size of toolbar buttons.
Thumbnail Bar Scale	Adjusts the size of the thumbnail bar.
Magnifying Glass Size	Adjusts the size of the area affected by the magnifying glass.
W/L Acceleration	Sets the rate or sensitivity of W/L adjustments. Typical range is 100–600.
Span Sensitivity	Sets the rate or sensitivity of span adjustments.
Thumbnail Column/Rows	Sets the number of columns and rows for the thumbnail bar.
Thumbnail Bar Orientation	Sets the position and resultant orientation of the thumbnail bar.
Header Menu	Sets the position of the toolbar and other header items.
DM Toolbar	Sets the position of the DM toolbar.

4. Click **SAVE.**

Configure calipers

You can configure the number and placement of calipers.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **INTERFACE**.
3. Under **Caliper Position**, select check boxes for each caliper that you want to display, and then click **SAVE.**

Configure other interface settings

You can configure miscellaneous viewer toolbar and other settings. For the main viewer toolbar settings, see "Configure the toolbar."

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **INTERFACE**.
3. Under **Other Toolbar**, enter the settings in the table below.

Setting	Description
Ask on Close	Prompts you to specify which items to save before

Setting	Description
	closing the viewer.
Single Instance Mode	Limits the viewer to one display frame per browser.
Skip Frames in Cine to Maintain Playback Speed	Skips large images in a cine loop so that the cine plays a fixed speed.
Show Cutlines for First/Last Images	Shows any available cutlines only on the first and last images of a series.
Open Key Images as Single Images	Displays any available key images separately in the thumbnail area. When cleared, shows all series images in the key image thumbnail area.
Use Modified Toolbar	Temporarily hides the thumbnail bar, and adds a Prior bar at the top of the screen that displays patient priors in order. You can point to a prior to display series/image thumbnails, and click the thumbnails to open the images. Works in conjunction with the Auto Show Priors Bar option.
Caliper Zoom	If selected, you can drag the calipers to zoom the current image.
Auto-Play Cine Loops	Automatically plays cine loops when opened.
Auto Play Cine Wait Time (ms)	Sets a pause time before auto-playing cine loops.
Default Frame Rate for MP4	Sets a default frame rate for MP4 files.
Default Cutline Thickness	Sets a default thickness for cutlines.
Auto Open Orders	Selects the options that appear in the Orders list in the **Viewer Settings** dialog box, General Info. screen, under Display Settings.
Auto Show Priors Bar	Shows all prior studies in a separate bar at the top of the viewer.
Focus-In on Zoom Point	When selected, the user can drag on an image to zoom in and out at the initial pointer position.
Fill Empty DM Cells	Fills undefined DM frames with images in the current study.
High-Quality Interpolation	Select to use high-quality image interpolation. Frequently used to enhance X-ray quality. You can use this compression option to remove unwanted "gridlines" if switching between earlier and high-resolution monitors.
Enable RGB/YBR Swap	Makes the color settings supported by the user video settings available.
Enable Developer Mode	Shows development mode logs, and displays a vertical green line in the right side of each frame

Setting	Description
	when the server performs a prefetch.
Show Calibrated Ultrasound Region	Server side setting.
Hide Partial Close Button	Hides the partial close button, an "X" that appears next to the logoff button. Partial closing closes the study, but leaves the viewer open for faster loading of future studies.
Hide All Monitor Layout Change Button	Hides the toolbar's monitor layout change button that appears when two or more monitors are made available.
Show Label in DM Preview	Shows the previews of hanging protocols in the DM bar.
Show Middle Slice Thumbnail	Shows only the thumbnail of the middle slice in a series on the thumbnail list.
Enable Cardio Viewer	[Unused]
Disable Queuing	Forces synchronous communication; client message and server response occur one at a time. CAUTION: We do not recommend changing this setting. Consult with your Konica-Minolta representative.
Stretch Prior Bar	Extends the prior bar across multiple monitors. If the prior bar exceeds the total available screen width, a scroll bar appears.
Show Prior Index	Displays the Prior index number in the thumbnail and Prior bars.
Auto open STAT	When you open a study in the Exa PACS/RIS viewer, this option automatically opens any STAT images, if included.
Split W/L Region	[Unused]
Color Only as Last Monitor	Chooses the color monitor as the last monitor on which to display images.
Client-Side Window/Level for US	Processes the Window/Level for ultrasounds on the client side. May reduce lag by bypassing the server.

4. Click **SAVE.**

Configure annotation tool functionality

You can configure annotation tool functionality.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **INTERFACE**.
3. Under **Annotation**, enter the settings in the table below.

Setting	Description
Show Annotation	Shows annotations by default. The user can still hide them manually in the viewer.
One-Click Annotations	Changes from the selected annotation tool to the default cursor after each use. If cleared, the user can reuse the tool repeatedly without re-selecting the tool.
Show One-Click Annotations Button	Shows a button for turning one-click annotation on and off.
Annotation Edit Mode	Selects the Edit command in the image shortcut menu by default.
Use Dot Cursor	Changes the standard pointer to a dot pointer.
Edit Annotations after Creating	Causes the viewer to enter Edit mode after initial placement of an annotation.
Allow Drag Create	Creates annotations by dragging instead of clicking.
Confirm Annotation Delete	Prompts the user for confirmation when deleting annotations.
Persistent Annotation Tool	Makes a selected annotation tool available until the user selects a different tool. If cleared, the pointer changes to the default operation after using the tool.
Show Measurements In	Sets the units for any length measurements taken.

4. Click **SAVE.**

Configure annotation colors

You can configure the color of annotations to indicate whether they are selected, in edit mode, or applied.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **INTERFACE**.
3. Under **Colors**, to add an annotation color, click inside a color or grayscale box and then use the color picker to select a color.
4. Click **SAVE.**

Configure annotation size and scaling

You can configure the pixel or font size of annotations, and scale annotation points.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **INTERFACE**.
3. Under **Miscellaneous**, enter the settings in the table below.

Setting	Description
Scale in Pixel Size	Determines the annotation font size by the pixel size.
Scale Annotation Font By	Sets the font size for annotations.

Setting	Description
Scale Annotation Point By	Sets the line thickness for annotations.

4. Click **SAVE.**

Configure recording

You can configure audio recording options for Exa Dictation.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **INTERFACE SETTINGS**.
3. Under **Record Control**, enter the settings in the table below.

Setting	Description
Hold for Record	Requires you to hold down the button for the duration of recording.
Beep on Record	Beeps when recording starts.
Blink on Record Pause	Causes the microphone light to blink when recording is paused.
Monkey Chatter on Rewind	Plays "monkey chatter" sound when rewinding.
FFWD/RWD Factor (200–500)	Changes the rate of fast forward and rewind.
Lag (0–5000)	Delays the response after clicking play or record by the specified amount of time.

4. Click **SAVE.**

Show or hide tool buttons

You can hide certain tool buttons.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **INTERFACE**.
3. Under **Tool Buttons**, select the check boxes of the items that you want to hide.
4. Click **SAVE.**

Configure fusion, ROI, and SUV options

You can configure options for fusion, ROI, and SUV.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **INTERFACE**.
3. Under **Fusion**, and under **ROI & SUV**, enter the settings in the table below.

Group	Setting	Description
Fusion	Auto Adjust for CT/PT Frame Count Mismatch	Select to reconstruct PET anatomy on fusion overlays between absent slices. Disable to display PET overlays only for slices originally included in the PT series.
ROI & SUV	ROI Show Size	Adds length and area measurements to ROI.

Group	Setting	Description
	Enable SUV Calculations	Select to add SUV calculations to ROI annotations of PET SUV series and CT-PET fusion studies. **Prerequisite**: Your system administrator must also enable SUV in a separate procedure.
	Show SUV Type and Measurements in the ROI Header	Select to include the SUV type and measurements in the ROI header.
	Show SUV Units after Measurements	Select to include the SUV units following the measured values in the ROI header.
	Default SUV Type	Select the type of SUV calculation to perform.

4. Click **SAVE**.

Configure modality-specific viewing options

You can configure how studies appear in the viewer for all modalities, or for each specific modality.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **MODALITY**.
3. In the modality list, select a modality to configure.
4. Enter the settings in the table below.

Section	Setting	Description
Layout	Screen Layout	Changes the layout of frames.
	Series Layout	Changes the layout of series frames within screen layout frames.
Mouse Buttons	Left/Right/Middle/Left+Right	Assigns functions to mouse buttons. This is frequently used by CAD users to assign functions to extra mouse buttons.
Compression		Sets the image quality, which inversely affects viewer performance.
Presets	Key	Assigns shortcut keys to W/L presets.
	Description	Type a name for the W/L preset.
	Window Width	Sets the window width of the W/L preset.
	Window Center	Sets the window center of the W/L preset.
	Set	Click when finished entering Preset settings.
Options	Auto Linking	Turns on the Auto Linking function.
	Assume Color Study	Forces studies of the selected modality to appear in the default color monitor set in the display settings regardless of color.

Section	Setting	Description
	Assure All Viewed	Displays a check mark in thumbnails of images that were opened.
	Auto CLAHE	Turns on the CLAHE function.
	Auto Hang DM	Enables the use of DMs. Makes the first instance on the DM preview available to hang on the viewer.
	Auto Hang Priors	Automatically loads the first prior when the viewer opens. Works in conjunction with Auto Open Priors.
	Auto Replace Priors	Automatically replaces prior images in the current layout.
	Auto-Invert SC Images	Inverts white and black of scanned documents such as reports. Reduces eye fatigue.
	Auto Next Series	When moving beyond the last image of the current series, automatically opens the next series.
	Auto Next Series Cine	Automatically starts cine play of the next series when the user opens it.
	Auto Next Series Wrap	Automatically opens the first series after viewing the last image of the last series in a study.
	Auto Next Study	Automatically opens the next study in the worklist after closing the current study.
	Auto Swap Red/Blue	Inverts colors that may not be displayed from the modality properly (such as with non-DICOM ultrasounds).
	Auto Show DICOM Overlays	Automatically displays DICOM overlays, if present.
	Auto Show SR Overlays	Automatically displays SR overlays, if present.
	Auto Show Cutlines	Automatically displays cutlines, if present. Note, this setting also applies to synthesized mammogram views, in which the cutlines indicate the position of the currently viewed image on the corresponding BTO view.
	Auto Show Cine	Shows the media control bar when a series is opened.

Section	Setting	Description
	Auto Show W/L Bar	Shows the window/level bar when the viewer opens.
	Detect Pixel Padding	Turns detection of pixel padding ON/OFF.
	DM Allow Missing Cell	Shows a blank cell in the DM if the assigned image is not available.
	DM Save W/L	Saves the window/level with the DM.
	Save Study DM on Close	Creates a new DM for each study when it closed, or when the next study auto-opens. The DM is named with the accession number, and contains the last displayed stack and monitor position.
	Show PDF in Last Stack	Moves PDF files to the last place in the stack: in the viewer, they are loaded last, if an empty cell is available.
	Instance Window/Level	Shows each image with its own W/L, rather than using the W/L of the first instance.
	Do Not Skip Images	Prevents scrolling forward if subsequent images are not yet loaded.
	Ignore Frame of Reference within Study	Disables referencing of the study's DICOM frame of reference UID when performing linking and cutline functionality.
	Ignore LUT	If LUT values are corrupted, Exa PACS/RIS ignores the LUT values, and attempts to render the best image possible.
	Ignore Presentation LUT	Same as Ignore LUT, but select for certain vendors that use a "Presentation LUT."
	Keep Rotate	Applies the current rotation to all images in the series.
	Keep W/L	Applies the current W/L to all images in the series.
	Keep Zoom	Applies the current zoom level to all images in the series.
	Extend Image Display (if Stretch)	When Stretch Across Monitors is selected, extends a single image across multiple monitors.
	Pixel Padding as Background	Interpolates missing pixel data to fill in "dead" spots in an image. **Note**: When

Section	Setting	Description
		using this feature, reading physicians should be aware that some pixels may be synthesized.
	Pre-generate Bitmaps	Pre-generates bitmaps automatically if imported into PACS.
	Reset W/L for Individual Images	Resets the W/L for each image. Frequently used to optimize MRI images. Clear to use the first W/L sent by the modality for all images.
	Select Last Contrast Entry	When DICOM tags include multiple W/L values, uses the last value for all images in the series. Clear to use the first value.
	Show 3D Spine Labels	Shows the 3D spine label tool on the toolbar.
	Show 'Bone Enhance' on Toolbar	Shows the Bone Enhance tool on the toolbar.
	Show DM Toolbar	Shows/hides the DM toolbar on initial load.
	Show Spine Labels	Shows the spine labels tool on the toolbar.
	Sort Thumbnails by Date/Time	Sorts thumbnails by date/time.
	Stop Thumbnail from Updating	Prevents W/L changes to the current image from affecting its thumbnail.
	Stretch Across Monitors	Turns on extending of items across multiple monitors.
	Cine Direction	Sets the cine playback to forward or backward.
	Default FPS	Causes cine play to occur at the default frames per second, depending on modality.
	Enable 4DM	Starts the 4DM viewer for post-processing. (Requires configuration to integrate with the 4DM viewer.)
	Disable CINE Scrolling	Disables cine play of series.
	Active Frame Based Cineplay	Playing a cine loop on one series automatically plays all linked series.
	Disable Caliper	Hides calipers for the modality.
Auto-Split Rules	Always	Splits US series into individual images.

Section	Setting	Description
	Differing Echo Time	Splits by echo time.
	Differing Series Number	Splits by series number.
	Differing Series Time	Splits by series time.
	Isolate MPEG	Splits by MPEG file.
	Isolate Multiframe	Splits cine loops into multiple images.
Premium View	Bone Enhance	Displays the contrast enhance menu.
Auto Bone Enhance		Highlights the bone portions of images.
Auto WL Type		Selects the default W/L to use for the selected modality.
Auto Reorder Images		Automatically changes the order of images in a series to the selected order.
Prior Options	Auto Open Prior	Automatically opens prior studies.
	Relevant Priors	When automatically opening priors, also opens relevant priors from other modalities. See "Advanced options for displaying relevant priors."
	Auto Open Prior Count	When automatically opening priors, opens the selected number of studies.
	Force Relevant Only	Opens only relevant priors based on modality, body part, and description.
	Prioritize Current Modality First	When opening relevant priors, display same-modality priors first.

5. Click **SAVE.**
6. Optional. If you selected Relevant Priors, see the next section, "Advanced options for displaying relevant priors."

Advanced options for displaying relevant priors

When you select the Relevant Priors check box in the Modality area of the Viewer Settings dialog box, a table appears for entering criteria that determine which relevant priors to open. To use this table, refer to the following examples.

* To open only priors of a specific modality, body part, or description, type the criteria in the corresponding columns of the table. For example, to only open images of the head, in the **Body Part** cell, type HEAD.
* To open priors for more than one item, you can type each item on its own row of the table. Also, you can specify multiple items on one line by delimiting with a bar. For example to open mammograms and ultrasounds, in the **Modality** cell, type MG|US.
* Use wildcards and regular expressions. For example, to specify CTs of the right and left knee having specific laterality, you can type the following.

Modality	Bodypart	Description	Main Study Bodypart	Main Study Description		
CT		KNEE *(RIGHT|RT|BI)		KNEE *(RIGHT|RT|BI)	✎	🗑
CT		KNEE *(LEFT|LT|BI)		KNEE *(LEFT|LT|BI)	✎	🗑

Note: The regular expression KNEE *(LEFT|LT|BI) means: The word KNEE, followed by either LEFT, LT, or BI.

Configure mammography

You can configure mammography viewing options.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **MAMMOGRAPHY**.
3. Enter the settings in the table below.

Section	Setting	Description
Mammography	Use 2+ Year-Old Priors	Makes available the display of priors that are 2 years old or more.
	Stack Same View	When Auto Next Series is turned on, stacking of 100% matches for a cell becomes available in the Display Manager.
	Auto Orient Mammo Views	Automatically orients mammo views.
	Swap Left/Right Breast Positions (with AutoOrient Only)	When Auto Orient Mammo Views is selected, switches the left and right breast images.
	Remove BTO Projections	Hides the BTO orientation overlay.
	Allow Mammo Switching via Overlay	When selected, the user can switch the side of the overlay if it obscures the image.
	Show BTO Orientation Overlay	Shows a bar in lower left indicating the cranial or caudal location in the breast when scrolling through a 3D image.
	Show Quick History	Show the Quick History of studies.
	List US Breast Priors after MG Priors	Orders priors in the prior bar.
	Enable DM Scroll	Turns on scrolling of DMs in the DM toolbar by mouse wheel.
	Enable Stack Scrolling	In special cases like BTO there will be multiple images present in the same series, which is received as a single DICOM. In these cases, turn on the stack scroll.
	Disable BTO Scrolling	Turns off scrolling in BTO views.

Section	Setting	Description
	Group DM Preview by Prior	Saves space on the prior bar by stacking DMs with the same prior logic. You can point to a prior to display matching priors in a vertical pop-out.
	Show Priors in Chronological Order	Orders priors in the prior bar.
	Auto Slab Tomo	Automatically applies a slab thickness to tomosynthesis studies.
	Stack By View And Prior Sort By	Enables scrolling through prior mammo images within a hanging protocol without needing a specific DM. Select Asc or Desc to scroll by age of prior.
	Enable SkinLine	Maximizes breast anatomy based on the skin line without degrading image quality.
SR CAD Options	[Select]	Sets what CAD overlays (data) are displayed in the viewer, if present.
	Apply Changes to All Images	Shows all available SR CADS in the images.
	Enable CAD Findings on ALL BTO Images	Displays all findings within the series on all images. CAD findings on non-referenced images are 67% transparent.

4. Click **SAVE.**

Configure overlays

You can configure the appearance and contents of overlays.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **OVERLAYS**.
3. Enter the settings in the table below.

Section	Setting	Description
	Font Family	Select the font used for overlays.
	Size	Select the font size used for overlays.
	Modality	Select to which modality the overlay settings apply. You can enter modality-specific settings or select all modalities.
Left/Right Overlay	Field	To display a DICOM field in the overlay, click in the box and then select a field from the list.
	Prefix	Type a prefix to the field name.
	Mask	Type text to appear in the mask.
	Add	Fill in the Left/Right Overlay fields and then click **Add** to add the overlay to the list.

Section	Setting	Description
Bottom Overlay	FOV/MAG/W/L	Displays the field of view, magnification, and W/L for each series in the bottom corner.

4. Click **SAVE.**

Add or remove toolbar tools

You can add or remove tools from various viewer toolbars in the program, and customize your choices by modality. For information about tools, see "Viewer toolbar tools" in the appendix.
Note: Not all toolbar tools can be removed.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **TOOLS**.
3. Under **Toolbar**, select the modality whose toolbar you want to customize.
4. In the list, select one of the following toolbars to customize.
   MAIN – The toolbar at the top of the viewer.
   TOP/BOTTOM/LEFT – The toolbar accessible by pointing to the top, bottom, or left edge of an image.
5. Under **Tools**, select or clear the check boxes of the tools that you want to add or remove.
6. Click **SAVE.**

Add or remove tools from the image shortcut menu

You can add or remove tools from the shortcut menu that appears when you right-click an image, and customize your choices by modality.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **TOOLS**.
3. Under **Toolbar**, select the modality whose shortcut menu you want to customize.
4. In the list, click **CONTEXT MENU**.
5. Under **Tools**, select or clear the check boxes for tools that you want to add or remove.
6. Click **SAVE.**

Assign toolbar keyboard shortcuts

You can assign keyboard shortcuts to tools, and customize shortcuts by modality.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **TOOLS**.
3. Under **Toolbar**, select the modality for which you want to assign shortcuts.
4. In the list, click **KEYBOARD SHORTCUTS**.
5. Under **Tools**, select the check boxes of the tools to which you want to assign shortcuts.
6. In the **Shortcut** box, type the shortcut character.
   Note: You can type a single letter, or `Ctrl +` a single letter.
7. Click **SAVE.**

Configure opening of a third-party program

You can configure Exa PACS/RIS to open third-party programs such as Ikonopedia, PowerScribe 360, and MModal. See also "Configure opening of PenRad" and "Opening of OrthoView."
Prerequisite: Perform the steps in "Install Exa Launch" and "Add a trusted IP or URL" in the appendix.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting ⚙ button.
2. In the **Viewer Settings** dialog box, in the left pane, click **GENERAL**.
3. Under **Display Settings**, in the table of monitors, on the row corresponding to the monitor on which to open the third-party application, select the row's **DISPLAY** check box.

4. In the row's **Orders** list, select the application (such as PS360 or MModal).
5. In the left pane, click **INTERFACE**.
6. Under **Other Toolbar**, in the **Auto Open Orders** group, select the application (such as **PS360** or **MModal**).
7. In the left pane, click **TOOLS**.
8. Under **Toolbar**, click **MAIN**, and then in the right pane, select the **External Tools** check box.
9. In the left pane, click **EXTERNAL TOOLS**.
10. Enter the settings in the table below, and then click **ADD**.

Setting	Description
Title	Type a title for the program.
Description	Type a description of the program.
Command	Type the command to run when you click the toolbar button (such as the path to the executable, or a URL).
Arguments	Type arguments to pass to the command at runtime. Note that Exa PACS/RIS supports the {{username}} and {{user_id}} variables.
Initial Directory	Type the path to the root folder.
Keyboard Shortcut	Optional: Type a keyboard key sequence to use as a shortcut for opening the program.
Toolbar Button	Optional: Select to add a dedicated button for the application on the viewer toolbar.
Do not Base-64 Encode URL Arguments	
Use Facility ID for Subdirectory	Do no select (reserved for PenRad).

Configure opening of PenRad

You can configure Exa PACS/RIS to be able to open mammography and ultrasound breast studies in PenRad by clicking a PenRad button on the viewer toolbar. Each instance of PenRad automatically opens in the configuration corresponding to the facility ID of the study. You must perform this configuration procedure for each user.

Prerequisite: Install Exa Launch.

1. In the Exa PACS/RIS viewer, in the upper toolbar, click the setting 🔧 button.
2. In the **Viewer Settings** dialog box, in the left pane, click **GENERAL**.
3. Under **Display Settings**, in the table of monitors, on the row corresponding to the monitor on which to open PenRad, select the row's **DISPLAY** check box.
4. In the row's **Orders** list, select **PenRad**.
5. In the left pane, click **TOOLS**.
6. Under **Toolbar**, click **MAIN**, and then in the right pane, select the **External Tools** check box.
7. In the left pane, click **EXTERNAL TOOLS**.
8. Enter the following settings, and then click **ADD**.

Setting	Description
Title	PenRad
Description	PenRad
Command	`exal://launch/q=`
Arguments[1] (variable filename)	`patient_id={{account_no}}&accession_no={{accession_no}}&cmd=penrad&study_id={{id}}&facility_id={{facility_id}}`
Arguments[2] (filename)	`patient_id={{account_no}}&accession_no={{accession_no}}&cmd=penrad&study_id=file&facility_id={{facility_id}}`
Initial Directory	[Leave blank]
Keyboard Shortcut	Optional: Type a keyboard shortcut.
Toolbar Button	Select (adds the PenRad button to the viewer toolbar).
Do Not Base-64 Encode URL Arguments	
Use Facility ID for Subdirectory	Optional: Select to open different instances of the application that are configured for different facilities on the same Exa PACS/RIS installation.

1. Creates a study_id.xml file (e.g. if the study ID is 1234, the file created is 1234.xml).
2. Always creates a file.xml file regardless of the study ID.

Configure opening of OrthoView

You can configure Exa PACS/RIS viewer to open a study in OrthoView by clicking the external app button on a worklist study row.

Prerequisite: Install Exa Tool (see appendix).

1. On the server, use a text editor such as Notepad to open the **exatool.toml** file (default location is C:\viztek\exa\cfg).
2. Add or edit the file to include the following within the **[tools]** section:

```
# Materialize OrthoView
[tools.orthoview]
launchURL = 'http://server_address:90\OrthoView\start.htm'
```

- Where server_address is the IP or fqdn of the server hosting OrthoView.
- If needed, substitute `http` with `https`.

3. Save and close the file.
4. On the burger menu, click **Setup**.
5. Next to the burger button, click the word in all caps, and then click **User Management**.
6. On the **EXTERNAL APPS** tab, click **Add**, and type the following settings.

Integration Name   `OrthoView`
URL   `exatool:///?tool=orthoview&study_id={{study_id}}&username={{username}}`

Note: You can use the following variables in place of, or in addition to those shown in colored text above.

{{accession_no}}	The accession number of the study
{{account_no}}	The account number of the patient
{{facility_id}}	The database ID for the facility of the study
{{study_id}}	The database ID for the study
{{user_id}}	The database ID for the currently signed-in user

7. Click **SAVE**.

Open a study in OrthoView

If OrthoView is installed on your server, you can use the Exa PACS/RIS worklist or viewer to open studies in OrthoView.

Prerequisite: Configure opening of OrthoView.

1. On the worklist, click the external app ▣ button.
2. In the button shortcut menu, click **OrthoView**.
   Result: Your browser downloads a .jnlp file.
3. Open the .jnlp file.

Lines, curves, shapes, and text

You can draw linear shapes and add text to images.

Draw lines and shapes

You can draw rectangles and ellipses on images.

1. On the viewer toolbar, click one of the following tools.

   - Rectangle ▣
   - Ellipse ◯
   - Straight line ◢
   - Arrow ◣

2. Drag on the image to create the shape.
   Optional:
   - To move a shape, drag any part of its outline.
   - To resize a shape, drag any of its handles.

Draw freehand lines

You can draw freehand lines on images.

1. On the viewer toolbar, click the pencil ◢ tool.
2. Drag on the image to draw a freehand line.
3. Optional. You can drag any points along the line to modify it.

Draw a curved shape

You can draw curved shapes on images.

1. On the viewer toolbar, click the curve ◠ tool.
2. Click at least three times on the image to specify a start point, a vertex, and a second vertex.
3. Double-click to close the shape.

Add text

You can add a text annotation to an image.

1. On the viewer toolbar, click the text **T** tool.
2. In the box, type text and then press **Enter**.

Note: There is no character limit, but carriage returns are not supported, and long text may extend beyond the visible image boundary.

Markers

You can add markers to images, such as for left and right.

Add a dot

You can add a dot marker to an image.

1. On the viewer toolbar, click the dot tool.
2. Click on the image to place the dot.

Add a vertical or horizontal line

You can add a vertical or horizontal line to an image.

1. On the viewer toolbar, click the vertical or horizontal line tool.
2. To add the line, click on the image.
3. Drag the line to position it.
   Note: To reveal the endpoints, you can drag a vertical line up or down, or a horizontal line left or right.

Add a left or right marker

You can add a left or right marker to an image.

1. On the viewer toolbar, click the left or right marker tool.
2. To add the marker, click on the image.
3. Drag the marker to reposition it.

Measurements

You can take various linear and angular measurements of images. Completed measurements remain as annotations. To adjust measurements easily, we recommend turning on Edit mode before taking measurements (see "Edit annotations").

Measure an angle

You can measure an angle on an image.

1. On the viewer toolbar, click the angle tool.
2. Click on the image three times to place a vertex and two endpoints.
3. Move the pointer to position the angle measurement, and then click to finish.

Measure a Cobb angle

You can measure a Cobb angle on an image.

1. On the viewer toolbar, click the Cobb angle tool.
2. Drag on the image to place the first angle line.
3. Drag again to place the second line.
4. Move the pointer to position the angle measurement, and then click to finish the angle.

Measure an HO angle

You can measure an HO angle on an image. An HO angle measures the degrees of the angle drawn relative to true vertical and horizontal.

1. On the viewer toolbar, click the HO angle tool.
2. Click on the image to place a starting point.
3. Click to place the end point.

Measure a radial angle or length

You can measure a radial angle or length on an image.

1. On the viewer toolbar, click the radial angle ⊞ or radial length ⊞ tool.
2. Click on the image to place the axes.
3. Drag the axes or their endpoints to take measurements.

Measure an elliptical or freehand ROI

You can measure properties of an ROI by drawing an ellipse or a freehand shape. The viewer displays the ROI's length (mm), area (mm^2), and the minimum, maximum, mean, and standard deviation in Hounsfield units.

1. On the viewer toolbar, click the ROI ▣ or free ROI ▣ tool.
2. Drag on the image to place the ellipse or the freehand shape.
3. Drag the outline or handles of the shape to adjust the ROI.

Measure a length

You can measure a length (mm) on an image.

1. On the viewer toolbar, click the measure ✎ tool.
2. Drag on the image to place the measurement line.
3. Drag the outline or endpoints of the line to adjust the measurement.

Measure and compare two lengths

You can measure the lengths (mm) from two starting points to an endpoint for comparison.

1. On the viewer toolbar, click the M compare ⊢ tool.
2. Click three times on the image to place a starting point, endpoint, and second starting point.
3. Drag any of the three points to adjust the measurement.

Take a freehand measurement

A freehand measurement is similar to freehand ROI, but it measures different values: angle; radius (mm); area (mm^2); and length (circumference in mm).

1. On the image shortcut menu, click **Annotations** > **Measures** > **FH Measure**.
2. Click three times on the image to place a vertex and two endpoints.
3. Move the pointer to position the circle measurements, and then click to finish.

Find a center point

You can find the center between two reference points.

1. On the image shortcut menu, click **Annotations** > **Measures** > **Center Point**.
2. Click twice on the image to place the first and second reference points.
   Note: The center point is indicated by an x.
3. Drag either of the reference points to adjust the measurement.

Draw a circle and measure its radius

You can draw a circle and measure its radius (mm).

1. On the viewer toolbar, click the circle ◯ tool.
2. Click twice on the image to place two loci.
3. Move the pointer to adjust the circle, and then click to add a third locus.
4. Drag any locus to resize or reposition the circle.

Spine labels

You can add preset labels for spinal vertebrae and discs to MR images. Labels are grouped by region (cervical, thoracic, lumbar, and sacral), plus another group for all discs. *Basic* labels do not include height and width measurements, whereas non-basic labels do. *3D* labels appear in all frames and planes, whereas non-3D labels appear only in the individual frames to which you add them.

Add basic spine labels

You can add basic spine labels to vertebra in ascending or descending order.

1. On the viewer toolbar, click the basic spine label tool.
2. In the button shortcut menu, click a region and starting vertebra.
   Note: Choose "Up" to apply labels in ascending order, or "Down" for descending.
3. Click on the first vertebra to add the first label, and then click on the second vertebra, and so on.

Add basic 3D spine labels

You can add basic 3D spine labels to vertebrae in ascending or descending order.

1. On the viewer toolbar, click the quick 3D spine label tool.
2. In the button shortcut menu, click a region and starting vertebra.
   Note: Choose "Up" to add labels in ascending order, or "Down" for descending.
3. Click on the first vertebra to add the first label, and then click on the second vertebra, and so on.

Add 3D spine labels

You can add 3D spine labels in ascending or descending order.

1. On the viewer toolbar, click the 3D spine label shortcut tool.
2. In the button shortcut menu, click a region and starting vertebra.
   Note: Choose "Up" to add labels in ascending order, or "Down" for descending.
3. Click twice on a vertebra to place a starting point and endpoint.
4. Repeat the previous step to label additional vertebrae.

Use a spine label shortcut

You can use a spine label shortcut to quickly start labeling from a common starting vertebra.

1. On the viewer toolbar, click the spine label shortcut , 3D spine label shorcut , or 3D quick spine label shortcut tool.
2. In the button shortcut menu, click a starting vertebra.
3. Add labels.

3D

3D labels appear in the image where you add them, and the same slice in other series.

Use the 3D cursor

When you place the 3D cursor on one series, the cursor also appears in the corresponding location in any cell of the same study that is open in the viewer.

1. Open two or more series of the same study (for example, an axial, sagittal, and coronal view).
2. On the viewer toolbar, click the 3D cursor tool.
3. Point to an image in one cell.
4. The cursor appears in the same location in the other cells.

Add a 3D point

You can mark a 3D point on an image. The point you place in the current image appears in the corresponding position in all frames and planes.

1. On the image shortcut menu, click **Annotations** > **3D Point**.
2. Click on the image to place the point.

Add a 3D ray

You can mark a 3D ray on an image. The vertex you place in one frame extends as a ray through the stack and is visible in other planes.

1. On the image shortcut menu, click **Annotations** > **3D Ray**.
2. Click on the image to place the vertex of the ray.

Add a 3D ROI

You can mark a circular ROI in one image, and the program adds the ROI to the same image in other series in the viewer. The viewer displays the ROI's length (circumference in mm), area (mm^2), and the maximum, minimum, mean, and standard deviation in Hounsfield units.

1. On the image shortcut menu, click **Annotations** > **3D ROI**.
2. Click twice on the image to place the center point and a tangent point.

Add a 3D length measurement

You can take a linear measurement (mm) in one image, and the program adds the measurement to the same image in other series in the viewer.

1. On the image shortcut menu, click **Annotations** > **3D Measure**.
2. Click twice on the image to place the first and second endpoints of the measurement line.

Add a 3D angle measurement

You can take a 3D angle measurement in one image, and the program adds the measurement to the same image in other series in the viewer.

1. On the image shortcut menu, click **Annotations** > **3D Angle**.
2. Click three times on the image to place the vertex and the first and second endpoints of the angle.

Shutters

You can add rectangular, elliptical, or freehand shutters.

Add a rectangular or elliptical shutter

You can add a rectangular or elliptical shutter to "crop" unwanted areas of an image.

1. On the image shortcut menu, click **Annotations** > **Shutters** > **Shutter Box** or **Shutter Ellipse**.
2. Click twice on the image to place a starting point and endpoint for the shutter.

Add a freehand shutter

You can add a freehand-drawn shutter to "crop" unwanted areas of an image.

1. On the image shortcut menu, click **Annotations** > **Shutters** > **Freehand Shutter**.
2. Drag on the image to draw the shutter.

Other annotation tasks

Add an AR annotation

You can plot points to represent angular rotation.

1. On the viewer toolbar, click the AR [AR] tool.
2. Click six times on the image to place guide points.

Edit annotations

After you finish an annotation, it is fixed in place to prevent accidental alteration. To move, edit, or delete an annotation, either click the tool that created it, or click the edit [✎] tool to enter Edit mode. You can click the edit tool again to exit Edit mode.

Saving and deleting annotations

You can save or delete annotations as follows.

- To save the current annotations, on the toolbar, click the save annotations [⬆] button.
- To delete all annotations, on the toolbar, click the delete all annotations [🖱] button.
- To delete all annotations for the current series, on the image shortcut menu, click **Delete Series Anno**.
- To delete all annotations for the current study, on the image shortcut menu, click **Delete Study Anno**.

Annotate ultrasounds with DiA

With the DiA ultrasound analysis application you can automatically annotate 2-, 3-, and 4-chamber cardio ultrasounds, and populate SDE reports with SR measurements.

[⚠] Incorrectly tagging cardio images can result in misdiagnosis. It is the user's responsibility to correctly tag series as 2-, 3-, or 4-chamber studies for purposes of DiA analysis. Neither Konica Minolta nor DiA Imaging Analysis are responsible for any outcomes resulting from mis-tagged images.

Prerequisite: Purchase a license for DiA.

1. Open one or more ultrasound images or series in the Exa PACS/RIS viewer.
2. On the toolbar, click the **DiA** [DiA] button.
3. In the center of each open frame, click the **2CH**, **3CH**, or **4CH** button to tag the image or series as a 2-chamber, 3-chamber, or 4-chamber item.
   Note: Select only one type.
4. In the upper right corner of each frame, click the **SG**, **EF**, or **Both** button to perform annotation and measurement.
5. To save the results, click the save annotations [⬆] button.
6. To view the SR data, open the study in the cardio report editor.

Reset an image in the viewer

When making non-permanent modifications to images in the viewer (zoom, rotation, Window/Level etc.), you can reset the image to its original state.

- On the viewer toolbar, click the reset viewer [↻] button.

Change elements in the viewer

Show or hide overlays

You can turn overlays on or off.

- On the viewer toolbar, click the overlay ⬤ button to turn overlays on or off.
- To show a preset DICOM overlay, in the image shortcut menu, click DICOM overlay, and then click an overlay.

Show or hide annotations

You can turn annotations on or off.

1. In the upper-right corner of a frame, right-click the menu icon ☰.
2. In the shortcut menu, click **Show Annotations**.

Show series and stacks

If the viewer is showing only a single frame of a series or stack, you can change it to display all series and stacks.

- On the viewer toolbar, click the reset series and stacks ⬙ button.

Show or hide cutlines

Cutlines show the intersection between two open series. The cutlines update dynamically as the user scrolls through a series. A dashed cutline indicates where the first image starts and the last image ends. A solid cutline indicates the intersection of the currently displayed locations in the series. If a series includes intersecting images, you can show or hide cutlines.

- On the viewer toolbar, click the cutlines ⬗ button.

Split series by image thickness

You can use slab tools to split series by image thickness.

1. In the upper-right corner of a frame, right-click the menu icon ☰.
2. In the shortcut menu, click **Slab Tools**, and then click a slab thickness.

Recalibrate the scale

You can manually recalibrate the scale measurement, which is shown on the caliper of the current series.

1. In the upper-right corner of a frame, right-click the menu icon ☰.
2. In the shortcut menu, click **Recalibrate**.
3. In the dialog box, type a new value (mm) for the scale, and then click **OK**.

Change the series layout

You can change the number of series panels displayed in the viewer.

1. In the upper-right corner of a frame, right-click the menu icon ☰.
2. In the shortcut menu, click **Series Layout**, and then click a layout.

Reorder a series

You can change the order of images in a series.

1. In the upper-right corner of a frame, right-click the menu icon ☰.
2. In the shortcut menu, click **Reorder**, and then click one of the following options.
   Image Number – Arranges the images by number in ascending order.
   Image Number Inverse – Arranges the images by number in descending order.
   Slice Location – Arranges the images by relative location (in mm) in the plane in ascending order.

Slice Location Inverse – Arranges the images by relative location in the plane in descending order.
Image Time – Arranges the images by the time they were taken.

Change the appearance of images

How the viewer chooses the initial window/level

There are many sources of window/level settings. When the viewer displays an image, it chooses the window/level settings from the first available of the following sources, in order.

- Last display state, if "Auto saved image properties on close" is turned on
- LUT (from prefetch), unless "Ignore LUT" or "Ignore Presentation LUT" is turned on
- DICOM tags – the window center and window width tags
- VOI LUT DICOM tags – value of interest LUT tags
- Manual W/L settings, if adjusted by the user

Turn on auto window/level

The viewer can automatically adjust the window/level so that images are, to the extent possible, neither too dim nor too bright.

- On the viewer toolbar, click the auto window/level ⊞ button.

Adjust the window/level

You can manually adjust the window/level.

- On the viewer toolbar, click the window/level ⚙ button.
- Drag horizontally over the image to adjust the window.
- Drag vertically over the image to adjust the level.

Apply a window/level preset

You can apply a window/level preset to the current study.
- On the image shortcut menu, click **Presets**, and then click a preset.

Apply CLAHE enhancement

You can apply CLAHE to enhance local contrast.
- On the viewer toolbar, click the CLAHE ▣ button to turn CLAHE on or off.

Apply bone enhancement

You can use different levels of bone enhancement to optimize the contrast between bone and other tissues. You can also apply color inversion to further highlight fractures and other features of bone.

1. On the viewer toolbar, click the bone enhance ✋ button.
2. In the button shortcut menu, click a percentage.

Invert colors

You can invert black and white values to make certain images easier to read.
- On the viewer toolbar, click the invert colors ◐ button.

Add color to images

You can add color to images.
1. Right-click the overlay in the lower-right of the image, and then in the shortcut menu, click **Palettes**.
2. Click a color in a palette.

Apply sigmoid processing

You can apply sigmoid processing to enhance low-contrast images.

- Right-click the overlay in the lower-right of the image, and then in the shortcut menu, click **Sigmoid**.

Reset and Reset study object

You can access the Reset and Reset study object commands in the image shortcut menu. *Reset* undoes all unsaved changes (such as W/L and annotations) made to the current series. *Reset study object* updates the viewer after new images are added to a study that is currently open.

Add to new UNQ study

A *UNQ* (unique) study is a teaching study. When you click this command in the image shortcut menu, a button appears on the toolbar to open the teaching study screen. See, "Create a teaching study."

Scaling images

Zoom images

You can zoom in on (enlarge) or out of (reduce) images for optimum viewing. There are several ways to zoom:

- On the viewer toolbar, click the zoom tool and then drag on the image.
- Click the zoom tool in the image shortcut menu: Tools > Zoom.
- Drag the pointer across a caliper (if Caliper Zoom is selected, see "Configure other interface settings").
- Right-click the lower-right overlay, click Enter Zoom, and then type a value from .05 to 7.5.
- "Quad zoom": Press the left or right angle bracket keys (< >).

Display one to one

If you zoomed an image you can restore it to its original DICOM size. This is essentially "life size."

- On the viewer toolbar, click the one to one button.

Display images in their actual size

You can display images in their original size.

- On the viewer toolbar, click the actual image size button.

Fit images to window

You can automatically zoom an image so that its longest dimension fits in the visible frame.

- On the viewer toolbar, click the fit to window button.

Use the magnifying glass

You can use the magnifying glass tool to zoom an area of the current image.

- On the viewer toolbar, click the magnifying glass tool, and then click and hold over the area to magnify.

Linking images

When two series are open side-by-side in the viewer, *linking* them causes scrolling through images in a second series when you scroll through images in the first series.

Auto link images

Auto linking means that linking turns on automatically when two or more series of the same plane (such as axial) are open. With auto-linking, the system uses the image numbers to automatically match up the frames in each series so that the frame in the second series is as near in stack order to the image in the first series as possible.

- To auto link images, on the viewer toolbar, click the auto link ![icon] button.

Manually link images

Manual linking means that you turn linking on and off manually when two or more series are open. This is frequently used to scroll through a recent image and a corresponding prior, side-by-side.

- To manually link images, on the viewer toolbar, click the manual link ![icon] button.
  Note: For mammogram images, you can only link LCC and RCC with each other; similarly you can only link LMLO and RMLO with each other.

Use the context tool

You can automatically jump to an image in a linked series that most closely matches the angle (X, Y, and Z position) of the image in the current series.

- On the viewer toolbar, click the context tool ![icon].

Reset linked series

You can reset (undo) image linking by clicking the reset linked series ![icon] button. This may take time depending on the size of the series.

Moving and jumping to images

Pan images

You can pan an image to view any portions that extend beyond the visible frame.

1. On the viewer toolbar, click the pan ![icon] tool.
2. Drag the image in any direction.

Scroll or span through images

You can scroll or span through images in a series. *Spanning* means to scroll rapidly with minimal hand motion.

- To scroll: Point to the image and rotate the mouse wheel.
- To span: On the image shortcut menu, click **Tools** > **Span Images**, and then drag on the image.

Flip or rotate images

You can flip images 180 degrees, or rotate them 90 degrees. From the image shortcut menu:

- Click **Transformation** > **Flip Horizontal** or **Flip Vertical**.
- Click **Transformation** > **Rotate Right** or **Rotate Left**.

Play cine loops

When viewing a series, you can play cine loops and shuttle between frames.

1. On the viewer toolbar, click the cine ![icon] button.
2. Cine play starts, and the media control bar appears.
3. Use the media control bar to pause, move to the first or last frame, and move to the previous or next frame.

Specify key images

You can specify key images in a series that you can jump to at any time. You can add key images thumbnails on reports.

1. Display the image that you want to be a key image.
2. On the image shortcut menu, click **Set Key Image**.

Jump to a key image

If you specified a key image in the current series, you can jump to it (display it in a frame in the viewer).

1. At the top of the thumbnail pane on the left side, click **Keyimage**.
   The thumbnail pane shows thumbnails of your key images.
2. Double-click a key image thumbnail.

Use MPR tools

Multiplanar reformation (MPR) creates images in orthogonal planes (axial, coronal, sagittal or MIP) relative to a base image. The MPR tool is hidden until you open a series.

Perform simple MPR

You can perform simple MPR to generate a single alternate planar view from the base view.

1. Open a series, and then double-click an image to view it full screen.
2. Click the arrow on the right side of the MPR [MPR ▼] button.
3. In the button shortcut menu, click a plane.
4. The viewer performs MPR and displays the new plane.

Perform standard MPR

You can perform standard MPR to generate three additional planar views of the base image.

- Open a series, and then click the MPR [MPR ▼] button.
  Note: The plane of the base image determines the default MPR plane.

Manipulate MPR images

You can manipulate MPR images in the following ways by using controls in the base image.

- To move through MPR images, drag the blue region bars. You can also drag the endpoints to adjust the viewing angle.
- To move both region bars at the same time, on the toolbar, click the context tool [⊞], and then drag on the base image.
- To change the slice thickness, double-click the thickness value, and then type a new value (or drag the thickness value).
- To change the slab width, click Region, double-click the slab width value, and then enter a new value (or drag the slab width value).
- To display an MPR image full screen with a large thumbnail of the base image, double-click an MPR image.

Work with PET fusion studies

Turn PET fusion display on and off

If a PET study was fused with another study such as a CT scan, you can turn display of the fused study on or off.

1. To turn on fusion display, point to the top of an image to display the image's top shortcut menu, and then click **PT**.
2. In the PT button shortcut menu, under **PET selection**, click a source study.

"Fused" appears in the lower-left part of the image to indicate the display state.

3. To turn off fusion display, in the PT button shortcut menu, click **Remove current PET**.

Color and blend PET fusion source studies

You can add color to source studies in a PET fusion study, and control alpha blending of the two studies. Specifying a color in one image applies the color to all images in the series.

Prerequisite: Turn on PET fusion display.

1. In the PT button shortcut menu, under **PET selection**, click the source study to color.
2. In the PT button shortcut menu, under **Palettes**, click a color.
3. In the PT button shortcut menu, under **Alpha Blending**, click a blending option.

Work with Display Management

With the viewer's display management functions you can create and manage highly customized "DMs." The term *DM* refers to *display management* in general, or to an implementation of a hanging protocol. By using DMs you can precisely customize how images "hang" in the viewer.

Configure viewer settings for DMs

Before working with DMs, configure the settings described in the following sections in this manual.

- Configure modality-specific viewing options
- Configure mammography
- Set up connected displays

Next, configure viewer settings as follows.

1. On the worklist, click settings ⚙, select **Viewer Settings**, and then in the **Viewer Settings** dialog box, on the left pane, click **MODALITY**.
2. In the list of modalities, select a modality that you work with (such as CT or MG).
3. To turn on DMs, in the settings area under **Options**, select the following check boxes.
   - Auto Hang DM
   - DM Allow Missing Cell
   - Auto Hang Priors
4. To view priors, under **Prior Options**, configure the following.
   a. Select the **Auto Open Prior** check box.
   b. In the **Auto Open Prior Count** list, select the maximum number of priors to open at once.
5. Click **SAVE.**
6. Repeat for each modality that you work with.

Show the DM toolbar

The DM toolbar gives you quick access to DM related functions. You can manually display the DM toolbar in the viewer, or configure the viewer to display the DM toolbar automatically for selected modalities. See also "Use the DM toolbar."

- *Manually*: In the viewer, click the display manager [DM] button, and then in the button shortcut menu, click **Show DM Toolbar**.
- *Automatically*: On the viewer toolbar, click the settings ⚙ button. Click **MODALITY**, select modalities, select the **Show DM Toolbar** check box, and then click **SAVE**.

Display images with a DM

You can select from a list of previously configured DMs to hang the current study. If you show the DM toolbar in the viewer, you can click a DM on the toolbar. If you did not show the DM toolbar:

1. Open a study in the viewer.

2. On the toolbar, click the DM [DM] button.
3. On the button shortcut menu, select one of the DMs in the list.
   Note: DMs are listed between the first item in the menu, "None," and "DM Manager."
4. Optional. You can change the view as follows.
   - Rotate the wheel to page through any additional images in the study that the DM can hang.
   - Drag a thumbnail onto a cell to display it there.
   - Press the left or right bracket keys ([or]) to page through any other available DMs.

Use the DM toolbar

As in the figure below, the toolbar contains tools on the left, and DMs (RCC 3D and RCC/LCC Tomo) on the right side of the tools. Use the toolbar as follows.
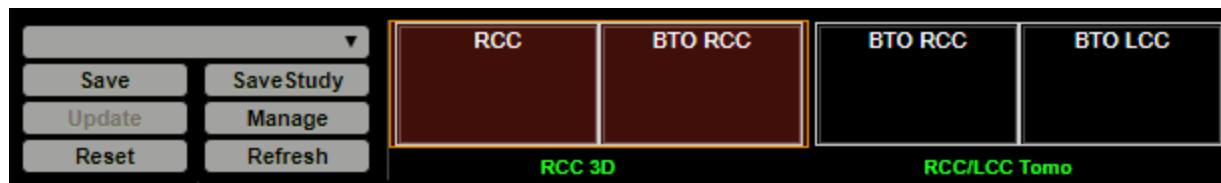
- Save: Saves a new DM based on the current layout.
- Save Study: Saves the current configuration for the current study only.
- Update: Overwrites the current DM with properties taken from currently displayed images.
  CAUTION: Clicking this button deletes all settings of the current DM.
- Manage: Opens the DM manager.
- Reset: Click to apply any newly created or edited DMs.
- Refresh: You can also *refresh* DMs to update the list of applicable DMs.
- [DM]: Click any DM on the DM toolbar to apply it in the viewer.

Find and open a DM for editing

If you have a large number of DMs you can find a specific one, and then open it for editing.

1. On the viewer toolbar, click the display manager [DM] button.
2. In the button shortcut menu, click **DM Manager**.
3. In the **DM Manager** dialog box, enter one or more of the following search criteria.
   User Groups – Select the group to which the DM user belongs.
   Users – Select the DM user.
   Filters – Select whether the DM is private (user-specific) or public.
   Modality – Select the modality associated with the DM.
   Name – Type all or part of the name of the DM.
4. Click **SEARCH**.
   DMs matching your search criteria appear in the list at the bottom of the dialog box.
5. To open the DM for editing, double-click it, or click its edit ✎ button.

Edit, delete, duplicate, or copy a DM

Each DM has four buttons on the right side of the list: ✎ 🗑 ⬇📋
These buttons do the following.
   Edit – Opens the DM for editing (for configuration, see "New DMs").
   Delete – Deletes the DM from the list.
   Duplicate – Duplicates the DM and prompts you to name the duplicate.
   Copy – Sends a copy of the DM to a user group or user.

Export and import DMs

You can export DMs for use in other Konica Minolta systems.

1. Find and select one or more DMs to export.
2. Click **EXPORT SELECTED** or **EXPORT ALL**.
   The DMs are added to a single JSON file and downloaded to your PC.
3. Copy the file to the destination system, display the **DM Manager** dialog box, click **IMPORT**, and then open the exported JSON file.

Add a new DM

To add a DM:

1. On the viewer toolbar, click the display manager ▣ button.
2. In the button shortcut menu, click **DM Manager**.
3. In the **DM Manager** dialog box, click **ADD NEW DM**.
4. In the second **DM Manager** dialog box, enter the following settings.
   Name – Type a name for the DM.
   Inactive – Select to disable the DM until ready for use.
   Private – Select to make the DM available only to you.
   Modalities – Select one or more modalities to which the DM applies.
   Body Part – Prevents all but the selected body part to display.
   To display any body part, leave blank.
   Page Count – The number of monitors that the DM uses to display images.
5. Under **Preview**, in the upper-left corner of the frame, click **1*1** and click a cell layout for the study-level series/images within the monitor.
6. Optional. Click **1*1** in of the cells, and click a series layout for the series-level images within a cell.
7. Optional. To allow missing cells, in the upper-right corner of a page or cell, select the check box. See "About missing cells."
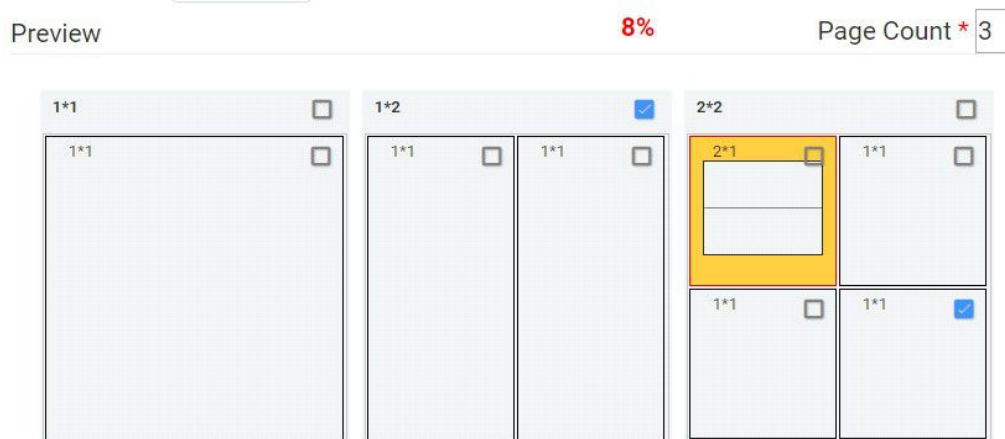

Figure. In this example, 3 pages (monitors) are configured, with 1, 2, and 4 cells added to each page, respectively. On the second page, Allow Missing Cells is selected at the page level, which means that either the left, right, or both cells can be blank. On the third page, the study will hang if images for the lower-right cell are missing, but not if they are missing in any other cells. The upper left cell is selected for adding a matching rule group and/or matching rule. Because the validation percentage is not yet 100%, matching rules must be added.

8. Note the validation percentage, and then click **SAVE**.

9. If the validation percentage was not 100%, you must add a matching rule that yields 100%. Continue to "Add a matching rule group."

About the order of DMs in the DM manager

When you open a study in the viewer, Exa PACS/RIS finds all DMs that match the study, and then hangs the study using the one that was highest in the list in the DM manager. It also makes all matching DMs available to you in the DM toolbar and in the DM button shortcut menu. You can change the default order of DMs in the DM manager by dragging them in the list.

About missing cells

By default, DM pages and cells do not allow *missing cells*. This means that if no image exists in the study that can hang in one of the cells on a page, no images hang at all on the page. For example, if you configured a DM to display a current image in the left cell and a prior in the right cell, but no prior is found, then the current image does not hang.

Sometimes it is preferable to allow missing cells. For example, if you configured your DM to display up to three priors, but only two priors are found, you still want to display the current image and the two priors.

Add a matching rule group

You can group matching rules and apply AND/OR logic to them. If set to AND, all rules in the group must be true to hang images, and if set to OR, at least one rule must be true. Adding a matching rule group is optional, but we recommend doing so for most applications.

1. In the DM Manager, in the list of DMs, double-click to open the DM to which you want to add a matching rule group.
2. Under **Preview**, select a cell.
3. At the bottom of the window, on the **MATCHING RULES** tab, click **ADD GROUP**.
    The new group initially appears as a row of buttons under the ADD GROUP button.

The matching rule group is the row of buttons on the bottom. No rules have been added to the group.

4. Add one or more rules to the group (see "Add a general matching rule," or "Add a mammo matching rule.")
5. In the list on the right side of the dialog box, select a relationship of AND or OR.
6. At the top of the dialog box, click **SAVE.**

Add a general matching rule to a DM

When you add a DM, the modality, body part, and allow missing cell settings you enter *roughly* determine which images hang where in the DM. You can also *finely* determine this by using general matching rules. In most cases you should use a general matching rule, but for mammography, see "Add a mammo matching rule to a DM."

General matching rules consist of an argument, logical operator, and matching value. For example: Study Date (arg.) is Less/Equal (operator) to 01/02/2003 (matching value).

1. Open the DM to which you want to add matching rules.
2. Under **Preview**, select the cell to which to apply the rule.
3. At the bottom of the window, on the **MATCHING RULES** tab, click **ADD GENERAL RULE**.

Note: If you created a group and you want the rule to be included in the group, click the button that is inside the group.
4. In the **Matching Tag** dialog box, enter the following settings.
   DICOM Tag/Field – Select a tag or field to use as the argument.
   Operator – Select an operator.
   Matching Value – Type a matching value, and then click the plus sign.
5. Modify the rule until the validation percentage is 100%, or add another rule.
6. Click **SAVE**.
7. In **DM Manager**, click **SAVE**.

Add a mammo matching rule to a DM

If you assigned the MG modality to a DM, you can add mammography matching rules to it. Mammo rules take the form of mammography-specific properties; if an image matches all properties the DM is applied.
1. Open the DM to which you want to add mammo rules.
2. Under **Preview**, select a cell.
3. At the bottom of the window, on the **MATCHING RULES** tab, click **ADD MAMMO. RULE**.
   Note: If you created a group and you want the rule to be included in the group, click the button that is inside the group.
4. In the **Mammo Rule** dialog box, enter the following settings.

Setting	Options	Description
Side	Left Right ?	Left breast Right breast Either
View	[Various]	Select the primary breast view.
DON'T CARE	[Various]	Select the secondary breast view. Selecting DON'T CARE allows any of the secondary views to display *except* ID.
Processing Type	Unprocessed Tomosynthesis CView Processed ?	Raw images 3D images 2D images taken from a tomosynthesis study Standard 2D images Images without the "0008,0068" Presentation Intent Type DICOM tag.
Image Index	ANY 1–20	Images of any index can hang Only an image of the selected index can hang.

5. Modify the rule until the validation percentage is 100%, or add another rule.
6. Click **SAVE**.
7. In **DM Manager**, click **SAVE**.

Add a prior matching rule to a DM

To hang priors, add a prior matching rule to the destination DM cell.
1. Open the DM to which you want to add prior rules.
2. Under **Preview**, select a cell.
3. At the bottom of the window, on the **MATCHING RULES** tab, click **ADD PRIOR RULE**.
   Note: If you created a group and you want the rule to be applied to the group, click the button that is inside the group.

4. In the **Prior Rule** dialog box, select the index of the prior that you want to hang in the cell.
   Note: Selecting ANY allows you to scroll through all available priors when viewing a single DM.
5. Click **SAVE**.
6. In **DM Manager**, click **SAVE**.

Add a mammo rule for breast implant displacement

You can create a DM for breast views that allows you to displace (effectively hide) the implant.
1. Add a mammo rule to a DM cell, and in the **DON'T CARE** list, select **ID**.
2. When viewing implant images, rotate the wheel to switch between displaced and non-displaced views.

About the DM validation percentage

The DM validation percentage helps you by indicating, roughly, the percentage of cells in a DM you are configuring that would not display any images under the current settings. To achieve 100 percent, apply a valid condition or rule to each cell in the DM. If the percentage is not 100, Exa PACS/RIS prevents you from using the DM at all. You can view the percentage by opening a DM for editing; the percentage appears on the right side of the Preview area title.

Use the Display Management tab

To automatically apply additional processing to all images that hang in a DM, you can use the Display Management tab in the DM manager.
1. In **DM Manager**, open a DM, and then select a cell.
2. On the **DISPLAY MANAGEMENT** tab, enter the following settings.

Setting	Description
Auto-Orient	[Unused]
Rotation	Select a degree of clockwise rotation.
Mirror	Select to switch the left and right breast view.
View	Select a zoom type.
Invert Sigmoid Linear CLAHE Fusion	Select one or more processing functions to apply.
LUT	Select an LUT to apply.
Bone Enhance	Select a percentage of bone enhancement.
Window/Level	Select Default or Custom. If Custom, type the values to apply.
Reprocess	Select to generate an additional view from the base view.

3. Click **UPDATE**, and then **SAVE**.

Create a DM from an existing layout

To create a DM more quickly, you can arrange a layout in the viewer, and then save it as a DM.

⚠️ The rules that are created with this method include as many parameters from the source studies as possible, and may be overly restrictive for general use, or apply unexpected image processing.

Therefore to ensure proper hanging and rendering, review the resultant rules in both the MATCHING RULES and DISPLAY MANAGEMENT tabs and modify if necessary.

1. In the viewer, open a study and configure the display to your liking.
2. On the toolbar, click the **DM** button, and then in the button shortcut menu, click **DM Save**.
3. In the **DM Information** dialog box, type a name for the DM and select or clear the **Private** check box.
4. Click **SAVE**.

Example DM with a general matching rule

In this example we add a DM for viewing chest X-rays with an AP view on the left and a lateral view on the right. Continuing after step 3 of "DM examples:"

Add the DM

1. In **Name** box, type CHEST TEST.
2. the **Modality** list, select **CR**, and then select **DX**.
3. In the **Page Count** box, type or select **1**.
4. Under **Preview**, on the page header, click **1*1** and select a 1 x 2 cell layout.

Add a rule group and general rules for the left cell

1. Select the left cell, and on the **MATCHING RULES** tab, click **ADD GROUP**.
2. In the new group, click **ADD GENERAL RULE**.
3. In the **Matching Tag** dialog box:
   - In the **DICOM Field/Tag** list, select **Modality**.
   - In the **Operator** list, select **Equal**.
   - In the Matching Value box, type **CR**, click the plus (+) button, and then click **SAVE.**
   Note: In practice you may also want to add the DX modality.
4. Following the previous step, add another general rule:
   - **DICOM Field/Tag** = SeriesDescription
   - **Operator** = Contains
   - **Matching Value** = ap
5. On the right side of the matching rule group, in the list, select **AND**.
   This means that the image must satisfy both rules to hang in the cell.

Add general rules for the right cell

1. Select the right cell, and click **ADD GENERAL RULE**.
2. In the **Matching Tag** dialog box, add the following rule:
   - **DICOM Field/Tag** = SeriesDescription
   - **Operator** = Contains
   - **Matching Value** = lat
3. Next to **Preview**, confirm that the validation percentage is 100%.
4. Click **SAVE**, and then close the DM manager.
5. Press **F5** to update the viewer with your new DM.

Example DM for ultrasound

In this example we add a DM that hangs a 3 x 2 series layout (3 rows, 2 columns) of only ultrasound images. Continuing after step 3 of "DM examples:"

Add the DM

1. In **Name** box, type US TEST.
2. the **Modality** list, select **US**.
3. In the **Page Count** box, type or select **1**.

4. Under **Preview**, click the 1*1 cell (not the page header), and select a 3 x 2 series layout.

Add a general rule for all images

1. Click inside of the page's 1*1 cell to highlight everything around the 3 x 2 series-level cells.
2. Add the following general rule.
   - **DICOM Field/Tag** = Modality
   - **Operator** = Equal
   - **Matching Value** = US
3. Confirm that the validation percentage is 100%, and then save the DM.

Example DM for mammography

In this example we add a DM that hangs a 2 x 2 layout of mammography images. Only MG images can hang, current study images appear in the top 2 cells, and any of the first available priors hang in the bottom 2 cells. Continuing after step 3 of "DM examples:"

Add the DM

1. In **Name** box, type `MG TEST`.
2. the **Modality** list, select **MG**.
3. In the **Page Count** box, type or select **1**.
4. Under **Preview**, click **1*1** (at the top of the page), and select a 2 x 2 cell layout.

Add a mammo rule group and mammo rule for the upper–left cell

1. Click the upper-left cell, and then click **ADD GROUP**.
2. In the new group, click **ADD MAMMO RULE**.
3. In the **Mammo Rule** dialog box, add the following rule.
   - **Side** = Right
   - **View** = CC Family
   - DON'T CARE
   - **Processing Type** = Processed
   - **Image Index** = ANY
4. Click **SAVE.**
5. On the right side of the matching rule group, in the list, select **OR**.
   This means that the image must satisfy at least one rule to hang in the cell.

Add a mammo rule group and rule for the upper–right cell

1. Select the upper-right cell, create a new group, and then add the following mammo rule to the new group.
   Side = Left
   All other settings = Same as previous for upper-left cell

Add a mammo rule group, mammo rule, and prior rule for the lower–left cell

1. Select the lower-left cell, add a group, and add the same mammo rule that you added for the upper-left cell, (Side = Right).
2. In the current mammo rule group, click **ADD PRIOR RULE**.
3. In the **Prior Rule** dialog box, in the **Study Index** list, select **ANY**, and then click **SAVE.**

Add a mammo rule group, mammo rule, and prior rule for the lower–right cell

1. Select the lower-right cell, add a group, and then add the same mammo rule that you added for the upper-right cell (Side = Left).
2. Add the same prior rule that you added for the lower-left cell.
3. Confirm that the validation percentage is 100%, and click **SAV**E, and **SAVE** to save the DM.

4. Close the DM manager. In the viewer, press **F5** to update and view your DM.

Gather information from images

View pixel values in Hounsfield units

You can view the value of a selected pixel in Hounsfield units.

- On the viewer toolbar, click the Hounsfield units [Hu] tool, and then click and hold the mouse button on the pixel of interest.

Display DICOM values

You can display the DICOM tag values associated with the current image by doing one of the following.

- On the viewer toolbar, click the DICOM values button.
- On an image shortcut menu, click **View** > **DICOM Values**.

Export DICOM values

When you view DICOM values in the viewer you can export them to a CSV. This CSV file can **only** be displayed correctly in **Notepad**, **Notepad++**, or **Wordpad**.

1. On an image shortcut menu, click **View** > **DICOM Values**.
2. In the title bar of the screen that appears, click the download button.
   Result: The file is downloaded to your Windows Downloads folder.

Print images to a standard printer

You can print the current image, series, or study to a TWAIN (non-DICOM) printer. It is a convenient, less-expensive alternative to DICOM printing, but is not suitable for diagnostic purposes.

1. On the viewer toolbar, click the print button.
2. In the **Print Image** dialog box, enter the following settings.
   Layout – Select the number and arrangement of frames per page.
   Page Size – Select the paper size and print orientation.
   Compress large images – Select to compress large images (for lower quality but faster printing).
   Selected Image – Select to print the current image.
   Selected Series – Select to print all images in the current series.
   Current Page – Select to print the current image in all displayed frames.
   All Images – Select to print all images in the current study.
3. Click **Print**.
4. In the Windows print dialog box, configure options and click **Print**.

Start a third-party application or function

If you configured a third-party application or function, you can start it from the toolbar.

- On the viewer toolbar, click the external tool button corresponding to the item to start.

Download images

You can download images and series from studies to your desktop in various formats.

- To download the current image as a PNG, on the image shortcut menu, click **Download Image**.
- To download the current series as a video, on the image shortcut menu, click **Download Series as MP4**.
- To download each image in the current series as a separate file, on the image shortcut menu, click **Download Series Image**, and then click the file format.

View CAD findings

The Exa PACS/RIS viewer automatically displays image markers contained in SR data from supported manufacturers such as iCAD, DiA, and CureMetrix (such as the CureMetrix mammography calcification and density markings). To control which markings to display, select options in the SR CAD list (see "Configure Mammography").

Work with Advanced Peer Review

Configure peer review

With purchase of a separate license, Exa PACS/RIS provides an advanced workflow for conducting peer reviews of approved studies. Before using advanced peer review, perform the following configuration tasks included in this section.

- Set up peer review by using existing roles, groups, and users
  <OR>
  Set up peer review by creating new roles, groups, and users
- Link peer review users to resources
- Configure peer reviewing provider filters

Set up peer review by using existing roles, groups, and users

Current users of Exa PACS/RIS probably already configured user roles, groups, and users. If so, follow the steps below to give peer review functionality to users by adding the appropriate rights to the relevant user roles. If one or more roles, groups, or users are not yet configured, skip to "Set up peer review by creating new roles, groups, and users."

1. On the burger ☰ menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **USER ROLES** tab, double-click the relevant user role.
   Note: The user role must be one that is assigned to the user group whose members you want to be peer reviewers.
4. In the **User Role Permission** area, select the **PeerReview** check box.
5. Click **SAVE & CLOSE**.
6. Continue to "Link Peer Review users to resources."

Set up peer review by creating new roles, groups, and users

Configure a new user role for peer review

To add peer review to an existing user role, see "Set up peer review by using existing role, groups, and users." To create a new user role for peer review, complete the following steps.

1. On the burger ☰ menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **USER ROLES** tab, click **ADD**, type a name and description of the role, and the click **SAVE**.

   For example, type PR, and then click **SAVE.**
4. In the **User Role Permission** area, select the **PeerReview** check box.
5. Select any other rights that you want to assign to peer review users.
6. Click **SAVE & CLOSE**.

Configure a new user group for peer review

To add peer review to an existing user group, see "Set up peer review by using existing role, groups, and users." To configure a new user group for peer review, complete the following steps.

   Prerequisite: Configure a peer review user role.

1. On the burger ☰ menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **USER GROUPS** tab, click **ADD**, and then enter the following settings.

Setting	Description
Group Code	Type your internal code for the group. For example, PR.
Group Name	Type your internal name for the group. For example, Peer Review.
Group Description	Type a description of the group.
Document Types	Select the document types that group members can access. For example, select **All Documents**.
Roles	Select all user roles having peer review rights, and any other roles that you want the group members to have.
Navigation	Select the areas of the program that group members can access (items available on the burger menu).

4. Click **SAVE**.

Configure a new user for peer review

To add peer review to an existing user, see "Set up peer review by using existing role, groups, and users." To configure a new user for peer review, complete the following steps.

Prerequisite: Configure a peer review user group.

1. On the burger ▤ menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. On the **USERS** tab, click **ADD**, and the enter the following settings.

Setting	Description
Group Name	Select the user group to which the peer review user role is assigned.
Name	Type the user's name.
Mobile Phone/Email	Type the user's contact information.
User Name	Type a sign in user name for the user.
Login with Google	When selected, the user can sign in through their Google account.
Password	Type a sign in password for the user.
Session Interval	Type or select the number of minutes before the user's session times out.
Allow Emergency Access	Type an amount of time to grant admin rights to non-admin users.
Access Expires After	Type and select a duration after which the user's account expires. Leave blank to keep the account open indefinitely.
One-Time Access	When selected, the user can sign in only one time.
User Must Change Password Next Login	Select to force the user to create their own unique password after signing in the first time.

Assign Claims to Follow-Up Queue for Another User	Select to allow assigning of claims to another user for completing Follow-Up on denied claims.
User can Change Accounting Dates	When selected, the user can edit accounting dates under Billing > Payments.
Dragon 360	Select to make Dragon available to the user.
Market	Select the markets that the user can view and modify.
Facilities	Select the facilities that the user can view and modify.
Linked Provider User Type	Select the user type if linking to one.
Hide Order Menu	[Unused]

4. Click **SAVE**.
5. Continue to "Link Peer Review users to resources."

Link peer review users to resources

To enable peer review workflow, you must link your peer review users to a Provider-Radiology resource.

1. On the burger menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **Providers & Resources**.
3. On the **RESOURCE** tab, click **ADD**, and then enter the relevant settings. Most are self-explanatory, but note the following.

Setting	Description
Type	Select **Provider-Radiology**.
Code	Type your internal resource code.
Facilities	Select the facilities that can use the resource.

4. Click **SAVE**.
5. On the **LOGIN DETAILS** sub-tab, select a user, and then click **LINK USER**.
6. Click **SAVE & CLOSE**.

Configure peer reviewing provider filters

Exa PACS/RIS automatically assigns random studies to each peer reviewing provider that are relevant to those providers. To specify which studies are relevant to which providers, configure filters for each peer reviewing provider as follows.

1. On the burger menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **Providers & Resources**.
3. On the **RESOURCES** tab, double-click the provider to configure.
4. On the **PEER REVIEW** sub-tab, enter filtering criteria.
   For example, if the provider can only review studies from the "Radiology Mart" facility:
   a. Under Facility, select **Is**.
   b. In the list of facilities, select **Radiology Mart**.
   Note: A study must meet all of the criteria you specify here to be available to the provider for peer review.
   Note: Leave settings blank to include all items in the filter. For example, leave the Study Description setting blank if the provider can review studies with any description.
5. Click **SAVE**.

Use peer review

Assign a peer reviewer for a study

Exa PACS/RIS automatically appoints peer reviewers and adds studies to their MY PEER REIVEW worklist filters. Additionally, users with "Peer Review manual appointment" rights granted to them by a radmin can manually appoint peer reviewers for their studies with the following procedure.

Prerequisite: Configure peer review (see "Configure peer review").

1. On the worklist, right-click a DICOM study, point to **Exam**, and then click **Assign Study**.
2. In the **Study Assignment** dialog box, on the **Assign for peer review** list, select a peer reviewer.
3. Click **SAVE**.

Reassign peer review

You can reassign a previously appointed peer review.

1. On the burger ☰ menu, click **Setup**.
2. Next to the burger button, click the word in all caps, and then click **User Management**.
3. Select the **Assigned Studies** tab, and then the **PEER REVIEW** sub tab.
4. Select one or more studies, right-click, and then select **Reassign**.
5. In the **Appoint Peer Reviewer** dialog box, appoint a new peer reviewer and click **SAVE**.

Conduct a peer review of a study

When peer reviewing users sign in to Exa PACS/RIS, a MY PEER REVIEW worklist filter appears with all studies assigned to the user for peer review.

1. On the worklist, on the **MY PEER REVIEW** tab, double-click a study to peer-review.
   The symbols accompanying studies indicate the following:

   ◉   Awaiting first review

   ◎   Awaiting second review

   ◉   Awaiting third review (disagreement)

2. In the **Peer Review** panel, click buttons on the toolbar to open any panels you need to conduct the review.

   Buttons: Peer Review (always ON), Prior Reports, Documents

3. Optional. To add documents, in the **Documents** area, click **FULL SCAN** (display options before scanning) scan or **QUICK SCAN** (scan without options).
4. In the top-right corner of the **Peer Review** area, select an agreement level, and then type comments as needed.
5. Click one of the following:
   SKIP – Withhold your review temporarily and return to the study later.
   SUBMIT & NEXT – Submit your review and open the next study in your list.
   SUBMIT – Submit your review.

About peer review disagreements

The worklist provides a Peer Review Disagreements tab for administrators that lists all peer-reviewed studies for which a reviewer selected *Disagree*. On the Peer Review Disagreements tab, administrators can reassign a study to a specific user for a third opinion, or dismiss the study, such as when a third opinion is not available. Users who are assigned for a third opinion peer review receive the study in their My Peer Review tab, and perform the new peer review in the usual manner.

Manage peer review disagreements

To manage peer review disagreements:

Prerequisite: Sign in as an administrator with the **Peer Review manual appointment** user right.

1. In the upper right corner of the worklist, click the disagreement button.

2. In the **PEER REVIEW DISAGREEMENTS** tab, right-click a study, and then:
    - To get a third opinion, click **Reassign for Additional Review**, and then appoint a new peer reviewer (see "Appoint a peer reviewer for a study").
    - To dismiss the study, click **Dismiss Study.**

Create a peer review report

You can generate a report that shows details on studies that were peer-reviewed.

Prerequisite: The user's user role must include Peer Review Operational right.

1. On the burger ▤ menu, click **Reports**.
2. Next to the burger button, click the word **REPORTS**, and then click **Peer Review Operational**.
3. Enter filtering criteria, and then click a button corresponding to the format in which you want to output the report.

Work with Patient Kiosk

What is Patient Kiosk?

Patient Kiosk is an add-on module for Exa PACS/RIS that streamlines the check-in process. You must purchase a separate license to use it.

For Patients

Patient Kiosk is a web-based program on a touchscreen device at a healthcare provider's facility to check in for appointments, view and update demographic and insurance information, and complete and sign electronic forms. Checking in through Patient Kiosk ensures that patients are correctly matched to their records.

For Staff

Staff can use functionality within Exa PACS/RIS to process appointments and information coming from patients using Patient Kiosk.

Configure Patient Kiosk

Enter topic text here.

Make study forms available on Patient Kiosk

You can configure study forms to be available for viewing and signing on Patient Kiosk. To add a study form to a study, see other sections in this manual.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **General**.
3. On the **FORM BUILDER** tab, double-click the form that you want to make available.
4. In the left pane, on the **ASSIGN** sub-tab, select the **Viewable on Patient Portal** check box.
5. Scroll down to **Facility**, and select the check boxes for the facilities where the form will be available.
6. Click **SAVE.**

Configure the wait time monitor

The wait time monitor appears in the upper right corner of the patient arrival worklist. It is similar to the TAT and STAT monitors on the traditional worklist, but indicates how long and how many patients have been waiting since sign-in. By default, the monitor includes three time bands (10, 20, and 30 minutes), but you can change the number of bands, their colors, times, and descriptions.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **Office**.
3. On the **COMPANY** tab, click the **APP SETTINGS** sub-tab, and then in the left pane, click **Patient Arrival Wait Time**.
4. In the right pane:
   - To add a new band, at the bottom of the list, enter settings (such as Description and Color).
   - To edit an existing band, double-click it in the list, and change settings as needed.
5. Click **SAVE.**

Use Patient Kiosk as a patient

Sign in as a patient

Patients can use Patient Kiosk to sign in at the point of care.
To start, tap a facility or type its name to search. Next:

1. On the Welcome page:

- **New patients**: Tap New patient, and then **skip to step 3.**
    - **Existing patients**: Tap Existing patient.
2. On the **Check-in** page:
    - If you were given a check-in code prior to arrival, tap **Check-in code**. On the **Check-in Code** page**,** enter your code, select the **I agree to the HIPAA privacy notice** check box, and then tap **Check In**.
    - If you do not have a check-in code, tap **Patient portal credentials**, enter your credentials, select the **I agree to the HIPAA privacy notice** check box, and then tap **Check In**.
3. On the **Demographics** page, enter or edit your personal information, and then tap **Next**.
4. On the **Contact information** page, enter or edit your contact information, and then tap **Next**.
5. On the **Responsible party** page, enter or edit information for the entity paying for the procedure, and then tap **Next**.
6. On the **Primary insurance** page, enter or edit information for your primary insurance provider, if any, and then tap **Next**.
   Note: If you do not know the policy number or other details, you can leave them blank for now.
7. On the **Secondary insurance** page, enter or edit information for the secondary insurance provider, and then do one of the following.
    - If the Submit button appears, tap it to finish sign-in.
    - Tap **Next**, and continue to the next step.
8. On the **Forms** page:
    a. In the **Who Is Signing** list, select the signer.
    b. In the **Name** box, type the name of the signer.
    c. Tap a form in the list, read/edit the form, and then tap **SAVE.**
    d. Use your finger or stylus to sign your name in the signature box, and then tap **Save Signature**.
    e. Repeat for all other forms in the list, and then tap **Submit**.

Use Patient Kiosk as a healthcare staff member

What is the patient arrival worklist?

The *patient arrival worklist* is a screen within Exa PACS/RIS that staff can use to manage the patient check-in process. When a patient signs in for an appointment by using Patient Kiosk, a patient row is added to the patient arrival worklist. In that worklist, staff can quickly view which patients have arrived, check in patients for scheduled or unscheduled appointments, add or edit patient demographics, take receipt of electronically signed patient intake forms, and perform other registration tasks.

Generate a check-in code for a patient

To facilitate patients checking in for their appointments through Patient Kiosk, you can either configure a patient portal account (see "Add or edit a patient's portal account,") or provide them with a check-in code.

1. On the worklist, on the **PRE ORDERS** tab, open an order.
2. In the edit study screen, on the left pane, click **PATIENT INFORMATION**.
3. Click **CHECK-IN CODE**.
4. Send the code to the patient by using email, phone, or other means.

Identify a patient's registration status

The color of each patient symbol on the patient arrival worklist indicates the registration status.

1. On the burger ▤ menu, click **PATIENT ARRIVAL WORKLIST**.
2. On the left of each patient row, find one of the following symbols.

Existing patient, no verification required.

New patient, or matching record not found. Requires searching for a matching record (see "Search for a patient") and/or verification (see "Verify patient sign-in information.")

Sign-in information differs from the patient chart, requires verification.

View patient details

You can quickly view primary demographics and insurance information from the patient arrival worklist.
1. On the burger menu, click **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** list, select your facility.
3. Click a patient row to view details.

Identify a patient's wait status

The color of the square on each row of the patient arrival worklist indicates how long the patient has been waiting to be checked in. By default, the colors indicate the wait times below. To change the colors and times, see "Configure the wait time monitor."

Waiting for less than 10 minutes

Waiting for up to 10 minutes

Waiting for 11 to 20 minutes

Waiting for 21 to 30 minutes

Find or create a patient chart

If a patient checks in as an existing patient but the system could not find a matching patient chart, the patient's registration is indicated by the symbol. For such patients you can manually search for and attach the patient chart or create a new patient chart directly from the patient arrival worklist.

Find the patient's chart
1. On the burger menu, click **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** list, select your facility.
3. In the patient shortcut menu, click **Patient Search**.
4. In the **Patient Search** dialog box, enter search criteria and then double-click a patient in the list of results.
5. On the patient arrival worklist, within the patient record, click:
   Accept – Use the demographics entered by the patient
   Reject – Use the demographics from the patient chart
6. Optional. Click **Edit Patient Information** to edit demographics.

Create a new patient chart
1. On the burger menu, click **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** list, select your facility.
3. Click the patient row to expand the record and then click **Create New**
4. Fill in the patient chart (see "Create a new patient chart" and "Edit basic patient information").

Verify patient demographics and sign-in information

You can check information that a patient entered in the kiosk upon sign-in.

1. On the patient arrival worklist, click a patient row to view details.
   The information appears as follows.

Green	Information that the patient added or edited during check-in.
Black	Original, unchanged information.
(*Parens*)	Information prior to editing by the patient during check-in.

2. Click one of the buttons to accept or reject all new and edited information.
3. If you want to accept some, but not all changes, first accept the changes, and then open the patient chart and modify the incorrect information.

Open the patient chart from the patient arrival worklist

You can open a patient chart of an existing patient from the patient arrival worklist.

1. On the burger ▤ menu, click **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** list, select your facility.
3. On the patient row, click the patient 👤 button to open the patient chart.

Check in a patient for a scheduled appointment

If the patient symbol is blue, and has a study scheduled within the next 12 hours, you can check in that patient. If a patient has multiple studies scheduled for a single visit, all of the studies are checked in at once.

Prerequisite: Verify patient details.

1. On the burger ▤ menu, click **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** list, select your facility.
3. Click the patient row, and then click **Check In All**.
   The patient is checked in, and the row is removed from the patient arrival worklist.

Create a walk-in appointment

If a patient signs in to the patient kiosk who does not have an appointment, you can create a walk-in appointment for that patient.

1. On the burger ▤ menu, click **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** list, select your facility.
3. Click the patient row, and then click **Walk-in Appointment**.
4. In the **New Appointment** screen, create the walk-in appointment.

Add documents at check-in

If you receive documents to attach to the patient's record or study, follow these steps.

1. On the burger ▤ menu, click **PATIENT ARRIVAL WORKLIST**.
2. Right-click a scheduled patient row, and then select **Upload**.
3. In the **Patient Document** screen, scan or upload documents as needed.

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Work with the patient chart

Exa PACS/RIS gives you full viewing access to patient demographics, and lets you add, edit, and import a *patient chart* (or an *electronic medical record* or *EMR*). The edit study screen contains much of the same information as the patient chart.

Find and open a patient chart

Find a patient chart by entering search criteria

You can find an existing patient chart by searching on various patient demographics.

1. On the burger ▤ menu, click **PATIENT**.
2. On the **Patient** screen, click the **SEARCH** tab.

   Note: If the tab bar is hidden, click the arrow ⊙ next to Patient to display it.
3. In the **Starts With** list, select a target for your search criteria.
   This target applies to all boxes in the search bar.
4. In the **All** list, type or select a search filter (these are typically facilities).
5. In the search bar, in one or more of the boxes, type one or more characters.
   The results appear in the **PATIENT SEARCH RESULTS** list.

Example

   To find "John Smith:"
1. Select **Starts With**.
2. Select **All**.
3. In the **Last Name** box, type `Smi`, and in the **First Name** box, type `Jo`.

Find a patient chart by scanning a driver's license

You can find an existing patient chart by scanning a driver's license.

1. On the burger ▤ menu, click **PATIENT**.
2. On the **Patient** screen, click the **SEARCH** tab.

   Note: If the tab bar is hidden, click the arrow ⊙ next to Patient to display it.
3. Click **SCAN LICENSE**.
4. Use your barcode reader to scan the driver's license.
   The results appear in the **PATIENT SEARCH RESULTS** list.

Open and view the patient chart

After finding a patient chart (see "Find a patient chart by entering search criteria" or "Find a patient chart by scanning a driver's license"), you can open it to view patient demographics and other information. For more information about each of the tabs within the patient chart, see the corresponding topic under "Edit study screen."

1. Find a patient chart, and then double-click it.
   The patient chart opens with the PATIENT INFORMATION tab.

2. To view more information, next to the **Patient** page title, click ⊙, and then select a tab (such as PATIENT GUARANTOR, or INSURANCE PROFILES).

Access confidential patient records (break the glass)

In emergencies you can use the Break the Glass function to open patient records that are normally off limits. All Break the Glass operations are added to the audit trail report. Users of type Associated Patients Only can also "break the glass" from the New Appointment screen. To "break the glass" on the physician's portal, or in the patient chart search screen:

500-000291A   168

On Physician Portal

Prerequisite: Configure access reasons (see, "Configure app settings").

1. On the **My Exams** worklist, select the **Break the Glass** check box.
2. In the **Break the Glass Warning** dialog box, use the search tools to find a patient, and then double-click the patient record.
3. In the second **Break the Glass Warning** dialog box, in the **Access Reason** list, select a justification for accessing the confidential record.
4. In the **Verify Your Credential** boxes, type your portal sign-in credentials, and then click **ACCEPT**.
   Result: Studies for the selected patient appear in the My Exams screen.

On the Patient screen

1. On the burger ▤ menu, click **Patient**, and select the **Break the Glass** check box.
2. Find a patient chart in the normal manner.

About VIPs

VIPs (very important patients) are patients who the facility wants to identify for special consideration by healthcare staff. A gray star appears next to patient names on the worklist, the patient chart, and other areas of the program. With the appropriate user rights, a user can click the VIP star to change it to a solid ⭐ star and thereby designate the patient as a VIP.

Create and modify a patient chart

About the patient ID, MRN, and account number

The patient ID (PID) is usually the same as the MRN or account number. When they differ, often it is because the PID comes from DICOM sources and the account number comes from RIS sources. This can happen when an incoming DICOM study with an existing PID conflicts with a receiver rule, and Exa RIS compensates by creating a unique account number. Also, staff often enter account numbers manually when creating pre-orders for new patients, because no PID would exist yet.

Edit basic patient information

You can edit or add new information to a patient chart.

1. Find and open a patient chart.
2. On the **PATIENT INFORMATION** tab, type or select information in the available fields. Most fields are self-explanatory, but note the following.

Setting	Description
Market	Select the market that serves the patient. All facilities in the selected market become selected in the Facilities field below.
Facilities	Set by default depending on the default location of the user who created the patient record. If the patient is created at the time of scheduling, it is set by default to the facility where the exam is being scheduled.
DICOM Patient ID	Set by default to the DICOM study tag patient ID or MRN, if any exists. See "About the patient ID, MRN, and account number."
Account No./Alt	The account number and optional alternate account number associated with the default AE. See "About the patient ID, MRN, and account number."

Setting	Description
Racial/Ethnic	Select all that apply.
Ordering Facility	Select a facility in the list, and then click the plus button to add it to the patient record. You can select multiple facilities.
Home Address	The patient's home address.
Language	The patient's preferred language.
[Driver's license information]	Enter manually. You can also click SCAN LICENSE and use your barcode reader to capture the license number and state.
Users Assigned	Select a user in the list, and then click the plus button to add it to the patient record. You can select multiple users.

3. Click **SAVE**.

You can enter information in the other tabs in the patient chart. Search this manual for the name of the tab for details.

Add vital signs

You can add new vital signs to a patient's history.
1. Find an open a patient chart.
2. On the **VITAL SIGNS** tab, click **ADD**.
3. In the **Vital Signs Details** area, enter vital signs and then click **SAVE**.

View a history of vital signs

You can view a history of patient vital signs, and view reports of specific categories of vitals.
1. Find an open a patient chart.
2. Select the **VITAL SIGNS** tab.
3. Optional. To view charts of vitals by category, in the upper-right part of the editing pane, click **CDC**, **PR**, **BMI**, **TEMP**, or **BP**.

Assign a guarantor for a patient

If the patient requires a guarantor for legal or insurance purposes, you can add one to the patient's chart.
1. Find an open the patient's chart.
2. On the **PATIENT GUARANTOR** tab, click **ADD**.
3. Enter the information for the guarantor, and then click **SAVE**.

About alternate account numbers

Patients receive a different MRN, PID, or account number when they undergo exams at different facilities. When Exa PACS/RIS receives such external studies, you can merge them into the master patient record by linking the external MRNs, PIDs, or account numbers as *alternate account numbers* of the Exa PACS/RIS account number. The benefits of this are:
- The viewer opens images from all records at once
- Any subsequently incoming studies having one of the account numbers are automatically linked to the other account numbers
- Helps prevent duplicate patient records
- Reduces the need to merge patient records

Configure alternate account number functionality

To be able to use alternate account numbers, perform the following procedures.

Configure an issuer of a PID

The *issuer of a PID* is an alias for the facility that issued the incoming PID (or MRN, or account number). You must configure an issuer of a PID in advance for each facility whose PIDs you want to use as alternate account numbers.

Some issuers require a standardized format for account numbers. You can prevent users from entering invalid account numbers by typing a regular expression against which the account number must match. Exa PACS/RIS will validate all future account number entries against your regular expression.

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **DICOM**.
3. On the **ISSUERS** tab, click **ADD**, and type a name for the issuing entity.
4. In the **Pattern** box, type a regular expression for validating PID/account numbers for the specified issuer.
5. Click **SAVE**.

Configure an AE for use with alternate account numbers

For each application entity that receives studies whose MRNs, PIDs, or account numbers you want to use as alternate account numbers:

1. On the burger ▤ menu, click **SETUP.**
2. Next to the burger button, click the word in all caps, and then select **DICOM**.
3. On the **AE TITLE** tab, double-click an AE in the list to open it.
4. In the **Issuer** list, select the PID issuer type, and if static, the exact issuer.
5. Click **SAVE.**

Configure a receiver rule for use with alternate account numbers

For each relevant receiver rule:

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **DICOM**.
3. On the **RECEIVER RULES** tab, double-click a receiver rule in the list to open it.
4. Under **Rule Information and Filter**, select the **Issuer of Alternate Account Number** check box.
5. Click **SAVE**.

Use alternate account numbers

To use alternate account numbers to link multiple patient records, complete the following steps. See also "About alternate account numbers" and "Link patients."

Prerequisite: Perform the procedures under "Configure alternate account number functionality."

1. On the burger ▤ menu, click **PATIENT**.
2. On the **Patient** screen, find the patient and open the patient chart.
3. On the **PATIENT INFORMATION** tab, click **MANAGE ALTERNATE ACCOUNT NUM/IDENTIFIERS**.
4. In the **Alternate Account Num/Identifiers** dialog box, click **ADD**.
5. In the **Issuer Name and Type** list, select an option, and then type the alternate account number or identifier.
6. Click **SAVE**.
   You can repeat this procedure to add multiple alternate account numbers.

Create a new patient chart

You can create a new patient chart.

1. On the burger [≡] menu, click **PATIENT**.
2. On the **Patient** screen, click the **SEARCH** tab.

   Note: If the tab bar is hidden, click the arrow [⊙] next to Patient to display it.
3. Click **CREATE NEW**.
4. Type, select, or scan information in the available fields.
   For more information, see "Edit basic patient information."
5. Click **CREATE PATIENT**.

Import a patient

You can import a patient record (.CSV) into Exa PACS/RIS. If the patient already exists in Exa PACS/RIS, you can update the existing record with the imported information, or create a new record.

Note: To view which fields must be present for the update to be successful, click the help [?] button on the right side of the PATIENT IMPORT button.

1. On the burger [≡] menu, click **PATIENT**.
2. On the **Patient** screen, click the **SEARCH** tab.

   Note: If the tab bar is hidden, click the arrow [⊙] next to Patient to display it.
3. Click **IMPORT PATIENT**.
4. In the **Import Patient** dialog box, click **Choose File**, and then browse for and select the file containing the patient record.
5. Optional. To update an existing patient record, select the **Update Existing** check box.
6. Click **IMPORT**.

Merge patient records

If the DOB, gender, first name, and last name of a new patient record are the same as an existing patient record, Exa PACS/RIS prepends "FIX_" to the account number of the record in the worklist. You can fix these records by merging them with the existing record. This can occur in such cases as a name change due to marriage or divorce, an updated account number, or an error in patient entry. You can use the following tasks to merge patient records.

Find a "FIX_" study

1. On the search bar of the worklist, in the **ACCOUNT NO**. box, type fix and then press **Enter**.
2. In the list of results, copy the account number (without the "FIX_" prefix) of a study.
3. Paste the account number in the **ACCOUNT NO.** box, and then press **Enter**.
4. In the list of results, compare the "FIX_" record with the other record to determine whether they are for the same patient.

Merge records

If you determine that two records are for the same patient, you can merge them.

1. On the burger [≡] menu, click **PATIENT**.
2. On the **SEARCH** tab, in the **MRN** box, enter the account number of the records to merge.
3. In the list of results, select the row containing the patient record that you *do not* want to keep.
4. On the right side of the row, click the settings [⚙] button, and then click **Merge**.
5. Repeat the previous two steps for the row containing the patient record that you *do* want to keep.
6. In the **Patient Merge** screen, confirm that the selected records are correct, click **MERGE**, and then click **OK**.

Work in the dispatching dashboard

The dispatching dashboard is where you work with Mobile RAD. It provides a view of the worklist for entering and tracking mobile studies. Before using the dispatching dashboard, you must configure the following study statuses (see "Configure study statuses") and add them to a study flow.

Status	Code
Assigned	AS
Accepted	ASAC
Rejected	RJ

To customize any other statuses you may need, contact your Konica Minolta sales representative.

View, create, and assign orders

View the worklist from the dispatching dashboard

1. On the burger ☰ menu, click **DISPATCHING DASHBOARD**.
2. To view all studies, click the **ALL** tab.
3. To view all pre-orders, click the **PRE-ORDERS** tab.
4. To view all orders with any order-related status that are not assigned to technicians or vehicles, click the **TO BE DISPATCHED** tab.

Create a new order for dispatch

The Pre-Orders tab in the dispatching dashboard shows all studies in the Ordered status. You can dispatch these orders (see "Assign an order"), or create a new order by following this procedure.

1. On the burger ☰ menu, click **DISPATCHING DASHBOARD**.
2. On the **TO BE DISPATCHED** tab, in the upper right corner, select a facility, and then click the New Order ⚙ button.
3. In the **New Appointment** screen, find a patient and schedule a study as you normally would, but note the following on the **APPT. INFO.** tab:
    - In the **Ordering Facility** list, select only if that facility—rather than the place of service—acquires the exam.
    - Under **Schedule Information**, you must select options in the **Place of Service** list.
    - The **Requesting Date** is optional.
    - Optional. Under **Schedule Information**, type an entry in the **Justification of Mobile Service** box to appear in the mobile app.
4. Click **CREATE ORDER**.

Assign an order

All studies that do not have a technologist or vehicle assigned in an Ordered, Scheduled, Confirmed, or other related status appear in the To Be Dispatched tab. To initiate these orders, assign them as follows.

1. On the burger ☰ menu, click **DISPATCHING DASHBOARD**.
2. On the **TO BE DISPATCHED** tab, right-click an order, point to **Dispatch**, and then select **Create New Dispatch**.
3. In the **Dispatch** screen, enter the following settings.

Setting	Description
[Dispatch resource list]	Select **Technologist** to assign the order to a technologist.

Setting	Description
	Select **Vehicle** to assign the order to a vehicle.
Date/Time	Select a date and time to dispatch the resource.
Dispatch To	Type to search for a resource of the type selected above, and then select a specific resource in the list of results.
Dispatch Orders	Select all orders to which you want to dispatch the selected resource.

4. Click **DISPATCH**.
   Note: A dispatch number is automatically created, which you can view in the worklist.

What happens after assignment?

After assigning an order, the order moves through the following steps.

- It appears in the **ASSIGNED** tab of the dispatching dashboard, and in the mobile app.
- The technologist accepts the assignment on the mobile app, and then the order moves to the **DISPATCHED** tab on the dispatching dashboard in Exa PACS/RIS.
- The technologist taps Tech Start on the mobile app, performs the exam, and then taps Tech End. The order moves to the **COMPLETED** tab in the dispatching dashboard.
- On the Exa PACS/RIS worklist, the order appears with images on the **ALL STUDIES** tab in the Tech Start, Incomplete, Unread, or other related status.

Perform query and retrieve

You can query a server and retrieve studies.

Prerequisite: Configure DICOM settings of the server to query, and configure DICOM settings for Exa PACS/RIS on the server.

1. On the burger ▤ menu, click **QUERY/RETRIEVE**.
2. In the list on the left side of the QUERY button, select a server to query.
3. Type criteria in the search bar and do one or more of the following.
   - To query the server, click **QUERY**.
   - To retrieve all matching studies, click **RETRIEVE**.
   - To retrieve *some* matching studies, select the studies, right-click, and then click **Retrieve**.

Work with the fax manager: Updox

If you purchased Updox fax or reminder services, the fax manager function sends you to the My Updox website where you can manage sending and receiving of faxes and reminders. Updox is a powerful tool because it helps you sync faxed information with patient records in Exa PACS/RIS. This chapter gets you started using Updox by describing some of the main configuration and operational tasks you can perform.

For full documentation, click the help ? button in the upper-right corner of Updox.
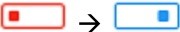
Configure Updox

Users with administrator rights can configure Updox, including users and groups, queues, fax numbers, and reminders.

Enable Updox in Exa PACS/RIS

By configuring Updox in Exa PACS/RIS, you enable it, specify what users, groups, and facilities can use it, and ensure that all outbound faxes to go through Updox rather than another service or implementation such as a fax modem.

Prerequisite: Obtain your Updox account information from your Konica Minolta representative.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **USER MANAGEMENT**.
3. On the **THIRD PARTY TOOLS** tab, in the left pane, select the user group that uses Updox.
4. In the right pane, in the **Updox** box, type your account information.
5. Select the **Send fax with Updox** check box, and then click the red switch to turn it ON.

   🔴 → 🔵

6. To grant administrator rights, select a user in the left pane, and then select the **Administrator** check box.
7. On the **USER GROUPS** tab, open a group that uses Updox, and then under **Navigation**, select the **Fax Manager** check box. Repeat for all groups that use Updox.
8. At the top of the screen, click **USER MANAGEMENT** and select **Office**.
9. On the **FACILITY** tab, open a facility, and under **Updox Account ID**, type the ID.
10. Select the **Send fax via Updox** check box.
11. Click **SAVE**, and repeat for all facilities that use Updox.
12. Configure your web browser to allow pop-ups. For example, in Chrome:
    a. On the overflow ⋮ menu, click **Settings**.
    b. Under **Privacy and security**, click **Site Settings**.
    c. Click **Pop-ups and redirects**, and then turn on the **Allowed** switch.

Configure users

Configuring users in Updox allows you assign Updox email addresses (for example, for individual users or for an entire practice), add staff to queues, assign sign-in credentials, and send notifications to individuals.

1. On the burger ☰ menu, click **FAX MANAGER**.
2. In **Updox**, in the upper-left corner of the screen, click **MENU**.
3. On the **Admin** tab, click **Users**, and then click **New**.
4. On the **User Information, Settings, and Notifications** tabs, enter all relevant information.
5. Click **Save**.

Configure queues

Queues are useful for organizing and routing your faxes and emails to the intended location and person. For example, you could create one queue for each department at a facility. Updox notifies specific users of the queue that they have a fax waiting. In that sense, a queue can act as a task list.

Prerequisites: Configure users.

1. On the burger ▤ menu, click **FAX MANAGER**.
2. In **Updox**, in the upper-left corner of the screen, click **MENU**.
3. On the **Admin** tab, click **Queues**, and then click **New**.
4. Type a name for the queue, select users who can access it, and then click **Save**.

Configure fax numbers

Konica Minolta provides you with a fax number that you can use for Updox, but your Konica Minolta sales engineer can also work with the phone company to add your existing fax numbers to Updox.

1. On the burger ▤ menu, click **FAX MANAGER**.
2. In Updox, in the upper-left corner of the screen, click **MENU**.
3. On the **Admin** tab, click **Fax Settings**.
   A list appears of all fax numbers configured for Updox.
4. Click a fax number to configure, and then enter the following settings.

Setting	Description
Nickname	Type an easily recognizable nickname for the fax number.
Route To	Select the queue to which Updox routes inbound faxes.
Tag	Tags are customizable labels that you can add to incoming faxes. For example, if you assign a tag labeled Authorizations to a specific fax number, Updox automatically adds the tag to all incoming faxes on that number.

5. Click **Save**.

Configure reminders

A reminder is an email, text, or voice message that Updox sends automatically to patients to remind them of their scheduled appointments. Updox records the patient response to a reminder, and automatically cancels appointments in Exa PACS/RIS if appropriate. To edit the contents of reminders, see "Configure scripts."

1. On the burger ▤ menu, click **FAX MANAGER**.
2. In Updox, in the upper-left corner of the screen, click **MENU**.
3. On the **Admin** tab, click **Reminders**.
4. On the **Rules** tab, enter the following settings.

Setting	Description
Practice Timezone	The time zone of the practice performing the exam.
1st Reminder	Select the type of reminder, and how long before the appointment to send the reminder.
2nd Reminder 3rd Reminder	Select the check boxes to add a second and or third reminder.

Setting	Description
Send reminders after confirmation is received	Select to continue to send reminders even if the patient confirms the appointment.
Blackout weekends	Select to not send reminders on Saturdays and Sundays during the times you specify in the start and end time boxes.
Allow patients to cancel an appointment from the reminder	When selected, the reminder includes a button, link, or other means to cancel the appointment.
Allow patients to call the office from the reminder	When selected, the reminder includes a button, link, or other means of calling the practice.
Filter out multiple reminders for patients within specified time frame	Select to only send a reminder for the first appointment during the time frame you select, and only once during the time frame you select. Cuts down on redundant reminders that can annoy patients.
Human Voice	Select the type of voice for voice reminders.

5. Click **Save**.

Configure scripts

When configuring a text script, the variable names in the Text Script dialog bx are misleading, so note the following

1. On the burger ☰ menu, click **FAX MANAGER**.
2. In Updox, in the upper-left corner of the screen, click **MENU**.
3. On the **Admin** tab, click **Reminders**.
4. On the **Scripts** tab, click **New**.
5. In the pop-up window, click the type of script you want to add.
6. Enter the script and other information. To use the script, select the **Active** check box.

   You can include variables in your script, as listed on the right. Note the following about variables:
   [location]   The facility in Exa PACS/RIS
   [with]   DO NOT USE
   [practice name]   The customer name in Exa PACS/RIS

7. Click **SAVE**.

Use Updox

View a fax or email

You can view the contents of your faxes, and any available fax-related metadata and historical activity.

1. On the burger ☰ menu, click **FAX MANAGER**.
2. In **Updox**, on the left pane, click **Inbox**.
3. In the list, click the arrow > button corresponding to the fax or email that you want to view.
4. Optional. If the item is a failed outbound fax, you can click RESEND to retry the fax.
5. Click the icon representing the item to open and view it.

View an appointment reminder

Appointment reminders are pre-configured emails, text messages, or voice messages that Updox sends automatically to patients regarding their scheduled exams. If the patient cancels an appointment through an appointment reminder, the appointment is automatically cancelled in Exa PACS/RIS. To set up an appointment reminder, see "Configure reminders." To view the contents, history, status, and patient response to an appointment reminder, do the following.

1. On the burger menu, click **FAX MANAGER**.
2. In **Updox**, in the upper-left corner, click **MENU**.
3. On the **Home** tab, click **Reminders Dashboard**.
4. Optional. In the left pane, enter criteria to filter the reminders list.
5. In the main list, click an appointment to view details about the reminder.

Process an order

Often referring physicians fax or email exam order documents, and you can attach them to the Exa PACS/RIS patient chart.

1. On the burger menu, click **FAX MANAGER**.
2. In **Updox**, on the left pane, click **Inbox**.
3. In the list, click the arrow (>) button corresponding to the order.
4. In the left pane, click **SEND ITEM**.
5. In the dialog box, type the patient name to search for the patient, select the correct patient in the list of results, select the **Send to EHR** check box, and then click **OK**.
   Note: If the patient does not exist, you can leave Updox open, create the patient in Exa PACS/RIS, and then return to Updox and search for the newly created patient.
6. In the form that appears, fill in fields as needed (such as the subject line), and then select the check box for one or more relevant studies.
   Note: The document is attached at the order level to the selected studies. If you do not select a study, the document is attached to the patient.
7. In the **Category** list, select the Exa PACS/RIS document type.
8. Click **SEND**.
   Result: The fax appears in the DOCUMENTS tab of the patient chart in Exa PACS/RIS.

Exchange secure text messages

With Updox, you can exchange secure text messages directly with a patient, and the thread is stored for future reference. Like faxes and emails, if the patient texts you a document, you can add it to the patient chart.

1. In the **Inbox**, click **Text Message**.
2. In the **Send a Text Message** dialog box, select **Secure** or **SMS**.
3. In the **Send To** list, search for and select a recipient (a patient who has a mobile phone number recorded in their chart).
4. Type a message, or select a template or macro.
5. Select the **Allow Responses** and/or **Attach a File** options as needed.
6. Optional. If the patient attached a document that you want to attach to the patient chart, select the check box for the document, click **SEND ITEM**, and then follow the same procedure for attaching a faxed document.
7. Click **Send Secure Text** or **Send SMS Text**.

Work with scheduling

A typical scheduling workflow

This section lists topics in the order that you would typically follow to schedule an exam. For other tasks, see "Other scheduling tasks."

Find an available time slot

You can begin scheduling by finding an available time slot in the *schedule book*, which is a calendar-style view of appointments by time and modality.

1. On the burger ☰ menu, click **Schedule** to open the schedule book.
2. On the menu bar, click **FACILITY** and then select the facility for the exam.
3. Optional. If you configured a schedule filter, you can select it from the **FILTER** list.
4. To move to the day of the exam, on the navigation bar, click **PREV** or **NEXT**.
5. Double-click an empty time slot in the column for the exam's modality.
6. Continue to "Set up a patient."

Set up a patient

After finding an available time slot, you can start to schedule an exam by setting up a patient. To set up a patient, you have three options: create a new patient; import a patient; or find an existing patient. **Prerequisite**: Start from "A typical scheduling workflow."

Create a new patient

1. On the **New Appointment** screen, click the **PATIENT** tab.
2. Under **Patient Search**, click **CREATE & SCHEDULE**.
3. Type the primary demographics (name, Patient ID, etc.) for the patient.
4. Continue to "Enter appointment information."

Import a patient

1. On the **New Appointment** screen, click the **PATIENT** tab.
2. Under **Patient Search**, click **PATIENT IMPORT**.
3. On the right side of the **PATIENT IMPORT** button, click **Choose File** or **Browse**.
4. In the **Open** dialog box, browse for and select the patient file, and then click **Open**.
5. Optional: To merge the patient that you are importing with an existing patient, select the **Update Existing** check box.
6. Click **IMPORT**.
7. Continue to "Enter appointment information."

Find an existing patient

1. On the **New Appointment** screen, click the **PATIENT** tab.
2. Under **Patient Search**, select a search mode in the list (Starts With, Ends With, or Contains).
3. Type all or part of a patient demographic in one or more of the boxes.
   Optional: If the **Break the Glass** check box appears, you can select it to search for confidential patient records. See "Access confidential patient records."
4. In the list of search results, double-click the patient whose exam you want to schedule.
5. If the **Recent Schedule** dialog box appears, click **NEW SCHEDULE**.
6. Continue to "Enter appointment information."

Enter appointment information

You can enter general information about the appointment and exam, and add preconfigured studies to perform.

Prerequisite: Start from "A typical scheduling workflow."

1. In the **New Appointment** screen, click the **APPT. INFO** tab.
2. Under **Appointment Information**, enter or modify the following settings.

Setting	Description
Location	The facility where the exam will be performed.
Modality	The modality for the exam.
Appointment Type	Type in the box to search dynamically for an appointment type, and then select one in the list. You can search by description or code number. See also "About procedure codes, appointment types, and appointment type procedures."
Available Date	The date of the time slot you selected. You can click the calendar button to change the date.
Resource	The modality room you selected. Not available for editing in this screen.
Ordering Facility Location	Type in the box to search dynamically for the ordering facility, and then select one in the list. For more advanced searching, click the magnifying glass tool.
Referring Physician	Type in the box to search dynamically for the referring physician, and then select one in the list.
Ordering Physician	Type in the box to search dynamically for the ordering physician, and then select one in the list. For more advanced searching, click the magnifying glass tool.
Attorney	Select an attorney in the list, if applicable.
Stat Level	Select an urgency for the exam.
Code, Units, and Modifiers	When you select an appointment type, the corresponding code appears in the code field, and any available default units and modifiers for the code appear. Edit the units and modifiers if needed.
[*Settings in the right column of the page*]	The Reading Physician and other settings in this column are optional. Exa PACS/RIS will assign the Station, Department, Institution, and Accession number automatically at another time during the scheduling workflow.
Select study detail options	(Available when studies are added in the Find Slots screen.) Select details to add to the appointment information that is not included by default. Click **APPLY TO ALL STUDIES** to add the selected information to all studies that you schedule.

3. Under **Diagnostic Codes**, click a diagnostic code in the list.
4. Continue to "Enter schedule information."

Enter schedule information

After entering appointment information, you can enter optional details about the appointment and the attending patient.

Prerequisite: Start from "A typical scheduling workflow."

1. On the **APPT. INFO.** tab, scroll beyond Diagnostic Codes, and then under **Schedule Information**, enter the following information.

Setting	Description
Source	Select the requester of the exam.
Patient Location	Select the intended destination (such as department) of the patient at the facility.
Patient Room No.	Type the room number for the patient's treatment.
Patient Condition	Select the current mobility status of the patient.
Place of Service	Select a place of service category.
Technologist	Type or select the technologist or vehicle performing the procedure.
Supervising Physician	Type or select the supervising physician for the procedure.
Requesting Date	Select the requested date for the exam.
Remind Me for Earlier Appointment	Select if the patient would like to be notified if an earlier time is available.
Transportation	Select the patient's mode of transportation to the facility for the exam.
Injury Date	Select the date of onset or injury.
Referral Number	Type the referral number, if available.
Patient's Condition Related To	Select whether the patient's condition is related to their employment, auto accidents, or other accidents.
Accident State	If you select a condition above, type the two-letter abbreviation for the state or province where the condition occurred.
Schedule Notes	Type schedule notes.
Justification of Mobile Service	If dispatching mobile services, type the justification.

2. Continue to "Enter insurance information."

Enter insurance information

After entering appointment information, you can enter information about the insurance provider handling payment for the exam.

Prerequisite: Start from "A typical scheduling workflow."

1. In the **New Appointment** screen, click the **INSURANCE** tab, and then under **Primary Insurance**, enter the following information.

Setting	Description
Existing Insurance	If the patient record already includes insurance providers, they appear in the list. Select one, if available. Information for the provider you select appears in the other fields.
Carrier	If no existing insurance providers are available, select a carrier here. Information for the carrier you select appears in other fields, but *you must enter the policy number manually*.
Provider Type	The provider type of the selected carrier is entered automatically.
Group Name	Type the provider group name.
Relationship	Select the relationship of the subscriber to the patient. If available, the date of birth and address of the person you select appear in other fields.
DOB	Select the subscriber's date of birth.
Sex	Select the subscriber's sex.
[Address]	Type or select the city, state, and ZIP code of the subscriber.
Subscriber Name	Type the name of the subscriber.
Service Type	Select the service types available through the insurer.
Benefit On Date	Select the benefit start date. Optional: To check whether the appointment is eligible for insurance coverage, click **Check Eligibility**.
Policy Number	Type the subscriber's insurance policy number.
Group No.	Optional. Type the subscriber's insurance group number.
Valid From/To Date	Select the dates during which the policy is valid.
[Address]	Type the street address of the subscriber.

2. Optional. Click **ADD SECONDARY INSURANCE**, and enter the information above.
3. In the **Other Physician** list, select a physician, and then click the plus button to add the physician to the list. You can add multiple physicians.
   Note: When the exam report is completed, if **Reports to me** is configured (see, "Deliver reports"), Exa PACS/RIS automatically sends a copy of the report to the physicians selected here.
4. Under **Attorney Alerts**, click in the box and type alerts for other attorneys.
5. Under **Patient Alerts**, select one or more check boxes relevant to the patient undergoing the exam.
   Note: To add a new alert, at the bottom of the **Patient Alerts**, type a new alert and click the plus button.
6. Continue to "Attach study forms."

Attach study forms

After filling out additional appointment information, you can fill out study forms such as for consent, HIPAA, and CT screening, and attach the forms to the appointment. You can have the patient verify the accuracy of the information in the form at the time of the exam.

Prerequisite: Start from "A typical scheduling workflow."
1. In the **New Appointment** screen, click the **STUDY FORMS** tab.
2. In the **Study Forms** list, select a form.
3. The name of the form appears under the Search study forms list.
4. To fill out the form, click its edit ✎ button.
5. Fill out the form, and then click **SAVE.**
   Note: To make the form available on the patient portal, select the **Patient Portal** check box.
6. Continue to "Create an order."

Create an order

After entering all information related to an appointment, you can create an order. In this topic, *creating an order* means to finalize the appointment, add it to the schedule book (except for walk-in appointments), and make it available in RIS and the worklist.
Prerequisite: Start from "A typical scheduling workflow."
1. On the **New Appointment** screen, click the **APPT. INFO** tab.
2. Click **ADD STUDY**.
3. A study appears in the list based on the information entered for the exam.
4. Click **CREATE ORDER**.
   Result: Depending on settings, one of the following happens.
     * The schedule book appears, showing the scheduled appointment
     * The edit study screen appears
     * The confirmation screen appears
5. Optional. To view a quick summary of the exam in the schedule book, point to the exam block.

Other scheduling tasks

This section describes scheduling tasks that were not covered in "A typical scheduling workflow."

Schedule a follow-up

If users specify follow-up exams, you can view a list of the specified exams and schedule them.
See also "Specify a follow-up exam."
1. On the burger ☰ menu, click the arrow › on the right side of SCHEDULE, and then click **PENDING FOLLOW-UPS**.
2. On the **Pending Follow-Ups** screen, enter filtering criteria and then press **Enter**.
3. Double-click an exam in the list, and complete scheduling tasks.

Track referrals

As part of your scheduling "to-do" list, you can view a list of referrals that are awaiting scheduling, and track their scheduling status. To enter referrals, see "Refer a patient."
1. On the burger ☰ menu, click the arrow › on the right side of SCHEDULE, and then click **PENDING REFERRALS**.
2. On the **Pending Referrals** screen, enter the date range and facility of the referrals that you want to view, and then click the search 🔍 button.
3. Double-click a referral in the list.
4. In the **Referral Status** dialog box, select a status, type notes, and click **SAVE**.

Create a quick block

You can create a *quick block* to specify time slots for non-exam events such as lunch breaks, or for dedicated use such as all-day training. *Soft quick blocks* are partial room reservations, and you can schedule exams over them. Soft quick blocks are semi-transparent on the schedule book. *Hard quick*

blocks are full room reservations, and you cannot schedule exams over them. Hard quick blocks are opaque on the schedule book. See also "Edit or delete schedule blocks."

1. On the burger ▤ menu, click **Schedule**.
2. On the menu bar, click **QUICK BLOCK**.
3. On the calendar, drag within a column to place a block.
4. In the **SCHEDULE TEMPLATES** screen, create a schedule rule for the quick block (see "Configure a schedule template and schedule rules").

Set no-shows

A *no-show* is a scheduled appointment that the patient did not attend. You can create a list of studies by type and date range, and then change the status of all studies in the list to "No-show."

1. On the burger ▤ menu, click **Schedule**.
2. Following, or on the right side of the menu bar, on the navigation bar, click **SET NO-SHOWS**.
3. In the filtering dialog box, enter a date range, select one or more statuses, and then click **NO-SHOWS**.
4. In the **No-Shows** screen, if necessary, refine the list by adjusting search criteria.
5. To change the status of all studies in the list to "No-show," click **SAVE.**

Print the schedule book

1. On the burger ▤ menu, click **Schedule**.
2. Under the menu bar, on the navigation bar, click the print 🖨 button.

Edit an appointment

You can edit the information in an appointment directly from the schedule book.

1. On the burger ▤ menu, click **Schedule**.
2. Double-click the schedule block in a time slot to open the edit order screen.
3. In the **Edit Order** screen, edit the information as needed.
   Note: For more information, see "Edit study screen."
4. Click **SAVE.**

Reschedule an appointment

On the burger ▤ menu, click **Schedule**, find an appointment on the schedule book, and then choose one of the following methods to reschedule the appointment.

Drag the appointment block

To move the appointment to a later time within the same day and same modality room, you can drag the appointment block to a new slot on the calendar.

Use the reschedule bucket

To move the appointment to a different day, you can use the *reschedule bucket*.

1. Right-click the appointment block, and then in the shortcut menu, click **Reschedule**.
   The appointment moves from the calendar to the reschedule bucket (bottom of the screen).
2. Find an available time slot on the calendar.
3. Drag the appointment block from the reschedule bucket to the new time slot.
4. In the confirmation dialog box, click **OK**.

Shorten or lengthen the appointment

To change only the end time of the appointment, you can resize the appointment block.

1. Click the appointment block.

2. Point to the bottom edge of the block, and then drag the orange bar up or down to shorten or lengthen the appointment.

Make quick changes to appointments

You can make several quick changes to the status, priority, flagging, and other aspects of appointments without having to open and edit them.

1. On the burger ▤ menu, click **Schedule**.
2. Right-click an appointment block and use the shortcut menu to do the following.

Setting	Description
Change Status	Point to **Change Status**, and then click a new status. Modifies workflow elsewhere in the program.
Priority	Point to **Priority**, and then click a new priority. Modifies workflow elsewhere in the program.
Flag	Add flags in the submenu to act as customizable filtering options.
Stat	Click a new urgency level.
Edit Study	Click to open the edit study screen.
Exam Prep Instructions	View exam prep instructions. If no instructions were entered, an "x" appears on the right side of the command in the shortcut menu.
Appointment Confirmation	Display the appointment confirmation screen.
Cancel	Cancel the appointment.
Reschedule	Reschedule the appointment.
Attach Files	Opens the Patient Document screen. See "View or add patient documents."
Log	Opens the audit log screen. See "View and export audit logs."

Cancel an appointment

You can cancel an appointment from the schedule book.
Prerequisite: The appointment must be in the Confirmed or subsequent status.

1. On the burger ▤ menu, click **Schedule**.
2. On the schedule book, right-click the appointment that you want to cancel, and then click **Cancel**.
3. In the **Order** dialog box, in the **Cancel/Delete Reason** list, click a reason for the cancellation.
4. If you click "others" in the previous step, in the **Reason** box, type a reason.
5. Click **SAVE.**

Use the Find Slots feature

Find slots is an advanced feature for finding appointment times. It can be easier to find a time slot first, and then schedule an appointment in it.

1. On the burger ▤ menu, click **Schedule**.
2. In the schedule book, on the menu bar, click **FIND SLOTS**.

3. In the **Available Slots** screen, in the **Patient ZIP Code** box, type the patient's ZIP or postal code.
   Note: If you arrived at this screen from the patient chart or burger menu, the program does not display this box.
4. **Distance from Patient** list, select a search radius.
5. In the **Appointment Type** list, select an appointment type.
6. Optional. Enter additional criteria in the **Facility**, **Modality Room**, **Date**, **Start Time**, and **End Time** fields.
7. Optional. If more time is needed for the exam than the standard duration, click **Additional Time**.
   Result: Available time slots that meet the criteria appear in a list.
   Note the following:
   - The program suggests slots at facilities nearest to the patient based on ZIP/postal code.
   - To select all facilities or modalities, make no selection or click Select all.
   - Time slots overlapping soft quick blocks are accompanied by a pink square.
   - Time slots overlapping hard quick blocks are omitted from the list.
8. In the list of time slots, click a slot.
9. Optional. To schedule another appointment, click **ADD APPOINTMENT**, and then repeat the steps.
10. Click **CREATE ORDER**.
11. Perform scheduling procedures.

Schedule appointments back to back

You can select to schedule multiple appointments back to back, which means that Exa PACS/RIS will present you with time slots that are available for all of the appointments on the same day at the same facility.

1. On the burger ▤ menu, click **Schedule**.
2. In the schedule book, on the menu bar, click **FIND SLOTS**.
3. In the **Available Slots** screen, in the **Patient ZIP Code** box, type the patient's ZIP or postal code.
   Note: If you arrived at this screen from the patient chart or burger menu, the program does not display this box.
4. **Distance from Patient** list, select a search radius.
5. In the **Appointment Type** list, select an appointment type.
6. In the **Appointment Type** list, select the next appointment type.
   Repeat to select three or more appointment types.
7. In the **Group Schedule** dialog box, click **BACK-TO-BACK**.
8. In the **Max Delay** list, select the maximum amount of wait time between time slots.
9. Enter additional scheduling criteria, and then click a slot.
10. Click **CREATE ORDER**.
11. Perform scheduling procedures.

Walk-in appointments

To immediately admit patients who do not have a previously scheduled exam, you can schedule a walk-in appointment. Walk-ins are considered exceptions and do not appear on the schedule book, but they do appear in the worklist so that staff can make accommodations.

1. On the burger ▤ menu, click **Schedule**.
2. In the schedule book, on the menu bar, click **WALK-IN APPOINTMENT**.
3. On the **New Appointment** screen, set up a patient (see "Set up a patient").
4. If the **Recent Schedule** screen appears, click **NEW SCHEDULE**.

5. On the **New Appointment** screen, on the **APPT. INFO** tab, in the **Modality** list, select a modality.
   Exa PACS/RIS fills in the **Available Date** box with the current date and time.
6. In the **Appt Type** list, click an appointment type.
7. Click **ADD STUDY**, and then click **CREATE ORDER**.

Change the time block duration on the schedule book

You can change the duration of time blocks on the schedule book.

1. On the burger ☰ menu, click **Schedule**.
2. On the schedule book, right-click anywhere in the left margin where the times of day appear.
3. Click a duration.

About the appointment confirmation screen

If configured (see the "Auto-Open Appointment Confirmation" setting), the appointment confirmation screen appears after creating an order. It provides a convenient summary of appointment-related information that you can share with patients. In the appointment confirmation screen you can:

- Click a study card under Exam Details to jump to the edit study screen.
- Type an email address and click **Email** to send the information.
- Click **Print** to print the information.
- Click **Fax** and enter the fax number to fax the information.

Edit or delete schedule blocks

You can edit or delete schedule blocks directly on the schedule book.
Prerequisite: Sign in as a user with the Schedule Block user right.

1. On the burger ☰ menu, click **Schedule**.
2. On the schedule book, click a schedule block, and then click its edit button.
   Result: Depending on the type of block, one or more editing and/or deleting option appears.
3. Click an option, and if editing, make changes in the editing screen.

About auto-blocks

When you schedule an exam in a timeslot to which a schedule rule applies, and the schedule rule specifies a particular resource to perform the exam (for example, a technologist), Exa PACS/RIS does the following.

- Checks to see if the technologist is also available to work in other modality rooms at the same time.
- If so, and if Autoblocking is enabled in the schedule rule, automatically creates schedule blocks in the other time slots to prevent future users from double-booking the technologist.

These schedule blocks appear on the schedule book as "Auto-Block with Study ID," and the Allow Scheduling option is disabled. You can edit auto-blocks like any other schedule block.

Automatically retrieve priors from an external PACS

When a patient is referred from another facility, it can be efficient to automatically retrieve priors from the referrer's PACS that are not already present in Exa PACS/RIS, and to control the timing of that retrieval. That is, you can configure Exa PACS/RIS to retrieve priors when it becomes likely that the exam will take place (such as when confirmed by the patient), but not so close to exam time (such as upon check-in) that waiting to fetch priors could delay reading. To set up automatic retrieval, follow this example in which we configure Exa PACS/RIS to retrieve priors when the study changes from Scheduled to Confirmed status.

1. Configure a query/retrieve AE (see "Configure AEs").
2. Configure a routing rule (see "Configure routing rules") with the following settings.

Setting	Description
Rule Name	Q/R Old PACS
Type	QUERY/RETRIEVE
AE Title	Select the query/retrieve AE you configured earlier.
Priority	1
Attempts	10
Priors	10
Modality	Modality of Current Study
Summary - Field	Patient Identifier
Account Number	Select to query the external PACS by the patient's account number, alternate account number, or alternate account number via issuer.
Issuer	Select the issuer
Name	Select Yes to include the patient's name in the query.
DOB	Select Yes to include the patient's date of birth in the query (in the format YYYY-MM-DD).

3. Configure a study flow from Scheduled to Confirmed status using the above routing rule (see "Configure study flow").

Work with billing

Exa Billing is a module of the Exa platform that lets you manage all aspects of the billing workflow from claim submission and receiving payments to preparing detailed financial reports.

Viewing claims

Find and view studies or claims

You can search for a study or claim and open it to view details.

1. On the burger 🍔 menu, click **BILLING**.
2. On the top navigation bar, click **Studies** or **Claims**.
3. Select a filter tab, such as **ALL CLAIMS**.
4. To find a study or claim, in the search bar, do one or both of the following:
   - Type or select one or more criteria and press **Enter**.
   - Click a column header to sort the list.
   Note: For tips on searching, see "Search syntax."
5. Double-click a study or claim in the list to open it for viewing.

Set the default tab for the study or claims list

You can specify which tab appears when you open the study or claims screen.

1. On the burger 🍔 menu, click **BILLING**.
2. On the top navigation bar, click **Studies** or **Claims**.
3. On the toolbar, click the filter ⅄ button.
4. In the **Claim Filter** dialog box, in the **Default Tab** list, select the default tab.

Create a filter for the study or claims list

You can create a new filter for the studies or claims list.

1. On the burger 🍔 menu, click **BILLING**.
2. On the top navigation bar, click **Studies** or **Claims**.
3. On the toolbar, click the filter ⅄ button.
4. In the **Study Filter** or **Claim Filter** dialog box, click **ADD.**
5. Type a name and order for the filter.
   Note: The *filter order* determines the placement of the filter as a tab and list item.
6. Select one or both of the following.
   Global Filter – Select to make the filter available to all users.
   Display as a Tab – Creates a tab on the Studies or Claims page with your filter applied.
   Display in Dropdown – Adds your filter to the Default Tab list.
7. Under the blue line, enter filtering criteria.
8. Click **SAVE.**
   Note: You may have to refresh your browser for changes to take effect.

View patient claim summaries

You can view an aggregated summary of available patient claims.

1. On the burger 🍔 menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, find a claim for a patient whose summary you want to view.
4. Right-click the claim and click **Patient Claims**.
5. Optional. To print the summary, select or clear the **Include Billing Provider Info** and/or **Include All Comments** check boxes, and then click **PRINT**.

6. Optional. To move to the next patient claim summary in the **Claims** list, click **NEXT**.

View a patient claim quick summary

You can view a claim summary in a read-only pop-up window.

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, find a claim for a patient whose summary you want to view, and click its claim
    summary 🗐 button.

View and edit claim inquiries

You can view and edit details on all available individual claims for a patient.

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, find a claim for a patient whose history you want to view, and click its claim
    inquiry 🗐 button.
    The inquiry screen appears with the claim that you selected.
4. To add claim notes or comments, in the **Transaction Detail** area, click **ADD**.
5. To scroll through claims, do the following.
    - To view the next claim, in the upper-right of the inquiry screen, click **NEXT**.
    - To view the previous claim, in the upper-left of the inquiry screen, click **PREVIOUS**.
6. Optional. To view a claims inquiry, click **PATIENT CLAIMS**.

Entering claims

Enter a claim for a study

You can find a study and then enter a claim based on the information in that study. This procedure
applies to studies that are completed but unbilled. For other charges, see "Enter a non–study-related
claim."
Prerequisite: Add a billing provider (see, "Configure a billing provider").

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **Studies**.
3. Right-click a study whose billed status is Unbilled, and then click **Create Claim**.
4. In the **Claim Creation** dialog box, on the **CHARGES** sub-tab, click **NEW CHARGE** and do the
    following:
    a. In the **CPT Description** list, select an item.
    b. In the **CPT Code** list, select a new code, if necessary.
    c. Add pointers and modifiers as needed.
5. Enter information in the remaining fields as necessary, and then click **SAVE ALL.** See "Settings in
    the claim entry screen."
    Tips
    - See "Keyboard shortcuts for the claim entry screen" in the appendix.
    - Use the sub-tabs to move quickly to different sections of the claim entry screen.

Enter a non–study-related claim

You can enter a claim for charges unrelated to studies, such as for CDs or medical records. Even though
this procedure is primarily intended for unrelated charges, you still have the option of associating the
charge with a study. For purely study-related claims, see "Enter a claim from an existing study."

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **Studies**, and then click **NEW CLAIM**.

3. In the **Claim Creation** dialog box, search for a patient by name or MRN.
4. In the **PATIENT SEARCH RESULTS** list, click a patient, and then do one of the following.
    - To add a study to the claim, click the check box of the study and then click **WITH STUDY**.
    - To create a claim without a study, click **CREATE WITHOUT STUDY**.
5. In the **Claim Creation** dialog box, on the **CHARGES** sub-tab, click **NEW CHARGE** and do the following:
    a. In the **CPT Description** list, select an item.
    b. In the **CPT Code** list, select a new code, if necessary.
    c. Add pointers and modifiers as needed.
6. Enter the remaining fields as necessary, and then click **SAVE ALL**. See "Settings in the claim entry screen."
    Tips
    - See "Keyboard shortcuts for the claim entry screen" in the appendix.
    - Use the sub-tabs to move quickly to different sections of the claim entry screen.

Enter claims in batches

To make it easier to process large numbers of claims for different patients, you can enter, edit, and validate then in batches.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Studies**.
3. Select multiple studies and then click **BATCH CLAIM**.
4. On the top navigation bar, click **Claims**.
5. On the search bar, in the **CLAIM STATUS** list, click **Pending Validation**.
6. Claims for all studies that you selected earlier are listed on the screen (along with any other claims in Pending Validation status).
7. Open the first claim in the list, edit as needed, and then click **VALIDATE**.
8. Click **NEXT**, and then repeat the previous step until all claims in the batch are processed.

Create claims automatically with Auto Billing

With the Auto Billing function you can create auto billing profiles, which are sets of criteria evaluated against study information. When a study matches all criteria in an auto billing profile, Exa PACS/RIS automatically creates a claim for the study. To create an auto billing profile:

Prerequisites:
    - Configure items for one or more criteria, such as facilities, modalities, and service codes.
    - Your user role must include the Autobilling user right (contact your facility administrator).

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, on the **Setup** menu, click **Auto Billing**, and then click **ADD**.
3. In the **Description** box, type a name for the profile.
4. In the **Results in Claim Status** list, select the status to assign to claims created based on this profile.
5. Under **Study Status**, **Facilities**, **Ordering Facilities**, and other categories, add one or more criteria as follows.
    - Select the Is or Is Not option (for example Is).
    - Select a study status in the list (for example, *Tech Start (TS)*)
6. Click the plus ➕ button.
7. Click **SAVE**.

Result: In this example, when a study changes to the *Tech Start* status, a claim is automatically created for that study.

Validate claims

You can validate claims to ensure that information is present in all required fields. To specify required fields, see "Configure validation."

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**, and then select one or more claims.
3. On the toolbar, click **VALIDATE**.
4. If any fields are invalid, the program displays them.

Add a claim to the follow-up queue

If you know that a claim will need further attention in the future, you can add it to the follow-up queue. To view the follow-up queue, in the upper left of the CLAIMS page, click the FOLLOW-UP QUEUE tab.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, right-click a claim and then click **Add Follow-up**.
4. In the **Add Follow-up** dialog box, enter a follow-up date.
5. Optional. If the user name list appears, select the person to whom to assign the follow-up.
6. Click **SAVE.**

Make quick changes to claims

You can make quick changes to claims without opening them for editing.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, right-click one (only) claim and then click one of the following.
   Change Billing Status – In the submenu, click a new status.
   Change Billing Code – In the submenu, click a new billing code.
   Change Billing Class – In the submenu, click a new billing class.
   Change Billing Payer Type – In the submenu, click a new payer type.

Split a claim

If a claim has more than one charge, you can split the claim by moving some of the charges to a new claim for the same patient.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, right-click a claim and click **Split Claim**.
4. In the **Create/Split** dialog box, find a charge that you want to move to the new claim, and click its plus (+) sign.
5. Click **SAVE.**
   The new claim is added to the **CLAIMS** page.

Submitting claims

Submit a claim

You can submit one or more claims of the same billing method.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. On the search bar, in the **Billing Method** column list, select a billing method (for example "Paper Claim").

4. In the claims list, select one or more claims, click **VALIDATE**, and then resolve any issues.
5. In the upper-right corner of the screen, click the billing method selection ⏷ button, select the same billing method that you selected above (e.g. **Paper Claim**), and then click the button (e.g. click **PAPER CLAIM (B&W)**).
6. In the dialog box do one of the following.
   - Electronic claims – In the EDI Claims dialog box, click Download, and then upload the edi.txt file the clearinghouse.
   - Other claims and invoices - Download or print the invoice.

Other claim-related tasks

View and edit the patient chart in Billing

You can open and edit the Exa PACS/RIS patient chart from within Billing.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**, and double-click a claim.
3. At the top of the screen, click the **Patient Chart** link.
   Result: The Patient Information tab of the patient chart opens.
4. Optional. Edit patient information and click **SAVE PATIENT**.

View patient alerts in Billing

You can view patient alerts from the Studies screen. To view patient alerts from the edit study screen, see, "View patient alerts."

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Studies**, and then open a study.
3. At the top of the **Claim Creation** dialog box, click **Alerts**.

View and enter notes and reasons for study

You can view previously entered patient, study, schedule, and reason for study notes, and enter new ones.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Studies** or **Claims**.
3. Double-click a study or claim in the list
4. In the **Claim Creation** or **Edit** screen, click **Notes**.
5. In the **Notes** dialog box, select a tab, and the do one of the following.
   - To enter a new note, click **ADD**, type the note, and then click **SAVE**.
   - To find an existing note, enter criteria in the search bar.
   - To edit an existing note, double-click it in the list.

View and download a patient document

You can download any patient documents that are available in Exa PACS/RIS.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, right-click a claim and then click **View Documents**.
4. Optional. In the **Patient Documents** dialog box, narrow the list of documents by entering properties in the search bar.
5. Double-click a document in the list.
6. In the second **Patient Documents** dialog box, in the right pane, click the link of the document to download.
   Result: Exa Billing downloads the documents to the Windows Downloads folder.

Upload a new patient document

You can upload and attach a new document to the patient chart. You can upload files of the following formats: TXT, PDF, and JPG.

1. On the burger menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, right-click a claim and then click **View Documents**.
4. In the **Patient Documents** dialog box, click **UPLOAD**.
5. In the second **Patient Document** dialog box, enter the required metadata and then click **SELECT FILES**.
6. Navigate to the file to upload, and then click **Open**.
   Note: Exa Billing renames the file with a UID, and displays its icon in the right pane.
7. Click **SAVE.**

View patient reports

You can view all available reports associated with a patient.

1. On the burger menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, right-click a claim and click **View Reports**.
4. In the **Approved Reports** dialog box, double-click a report to open it.

View the patient claim log

You can view a log of patient claim activity.

1. On the burger menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. In the claims list, right-click a claim and click **Patient Claim Log**.

Send claims to collections

You can prepare a report to review all claims that are in "collections review" status. You can generate this report for the collection agency, change the claim statuses to "claim in collections," and adjust off the claim balances.

1. the burger menu, click **BILLING**.
2. On the **Report** menu, click **Collections**.
3. Select filtering criteria in the **Claim Date**, **Facilities**, and **Billing Provider** lists.
4. Optional. To send the report to the collections agency, select the **Send claims to collections** check box.
5. To generate the report, select a report format button (such as **PDF** or **EXCEL**).

Find and view payments

You can find and view existing payment information for reference or editing.

1. On the burger menu, click **BILLING**.
2. On the top navigation bar, click **Payments**.
3. To filter the list of payments, in the search bar, do one or more of the following.
   - Type or select one or more criteria and then press **Enter**.
   - Click a column header to sort the claims list.
   - In the upper-left part of the screen, click the **Payment Status** button and then select one or more payment status filters.
   Note: For tips on searching, see "Search syntax."
4. Double-click a payment in the list to open it for viewing or editing.

Add a new payment

You can add a new payment based on an EOB or an invoice. "Adding" a payment records the bulk payment in the system, but does not apply the payment to claims and charges. To apply such added payments, see the "Apply payments" topics.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Payments**.
3. At the top of the payments list, click **ADD.**
4. In the **PAYMENTS** screen, enter the payment details and then click **SAVE.**
5. Optional. New buttons appear in the middle of the screen that you can use as follows.
   - To enter a new payment, click ADD.
   - To print a record of the payment, click PRINT.
   - To delete the current payment, click **DELETE**.

Step through claims to add payments

You can step through claims and add payment information.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**, and open a claim.
3. At the bottom of the **PAYMENTS** sub-tab, click **NEW PAYMENT**.
4. Enter payment information, and then click **APPLY**.
5. Enter payment details, and then click **SAVE** and close the dialog box.
6. Click **PREV/NEXT** to step through claims and add payments.

Apply payments against a list of unpaid claims

You can apply payments to an automatically generated list of unpaid claims for the payer.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Payments**.
3. In the payments list, open a payment.
4. In the bottom pane, click the **PENDING PAYMENTS** tab.
5. Optional. Sort or filter the list with search criteria.
6. In the list of payments, double-click the payment to apply.
7. In the dialog box, edit payment information as needed and then click **PAY IN FULL**.
8. Exa Billing applies payment to the line items in the list in order, until the payment balance is 0.
9. Click **SAVE.**

Apply payments against a customized list of claims

You can apply payments to a list of claims that you can customize first by patient, and then by other criteria.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Payments**.
3. In the payments list, double-click a payment.
4. In the bottom pane, click the **PENDING PAYMENTS (BY PATIENT / CLAIM / INVOICE)** tab.
5. Use the search tools to find a patient, and then double-click a patient in the list.
6. In the dialog box, edit payment information as needed and then click **PAY IN FULL**.
7. Exa Billing applies payment to the line items in the list, in order, until the payment balance is 0.
8. Click **SAVE ALL**.

Pay a claim in full

You can automatically apply a payment to adjust a claim to be paid in full.

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **Claims**.
3. On the shortcut menu of the claim to pay, click **Adjust to Paid in Full.**
4. In the **Adjust to Paid in Full** dialog box, in the **Adjustment Codes** list, select an adjustment code.
5. Click **SAVE**.

Look up and edit applied payments

You can look up applied payments for reference, and edit them if necessary.

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **Payments**.
3. In the payments list, double-click a payment.
4. In the bottom pane, click the **APPLIED PAYMENTS** tab.
5. Edit the payment information and then click **SAVE.**

Export the payments list

You can export the contents of the currently displayed payments list to a CSV or PDF file.

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **Payments**.
3. In the payments list, filter the list as needed.
4. Do one of the following.
    - To download a CSV file, click **EXPORT**.
    - Exa Billing downloads the list to your Windows Downloads folder.
    - To download a PDF file, click **GENERATE PDF**, and then download the PDF from the preview window.

Import payments

If a clearinghouse submits an EOB file, you can import payment information into Exa Billing.

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **EOB**.
3. Optional. To preview the file before importing it, click **PREVIEW EOB FILE**, browse for and select the file, and then click **Open**.
4. Click **UPLOAD & PROCESS EOB FILE**, browse for and select the file, and then click **Open**.

Apply TOS payments

You can automatically apply TOS payments to claims having the same date. If the claim has more than one charge, the payment is evenly distributed among the charges.

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **Payments**.
3. On the **Payments** screen, click the **Payment Status** button (ALL SELECTED) and then select **Unapplied**.
4. On the search bar, select:
    - A payer type of Patient
    - An accounting date range
5. Click **APPLY TOS PAYMENT**.

Write off a small balance

To avoid wasteful processing of claims with small balances, you can automatically write them off or otherwise adjust them.

1. On the burger ▤ menu, click **BILLING**.
2. On the top navigation bar, click **Payments**.
3. On the **Payments** screen, click **SMALL BALANCE ADJUSTMENT**.
4. In the **Small Balance Adjustment** dialog box, type the maximum balance to write off or adjust, and then click **NEXT**.
5. Confirm the contents of the results list, and then click **COMPLETE**.

Mobile billing

If you purchased the necessary license, Exa PACS/RIS provides features that support mobile billing. To work with mobile billing you must first configure ordering facilities. See "Configure an ordering facility."

About the Census screen

The Census screen shows a list of studies at ordering facility locations of type Census, and lets you create claims for them. Such ordering facility locations process studies whose payer status is unknown or subject to change, even up to the day of the study (for example, Medicare patients at skilled nursing facilities). When the billing method for a study is finalized, you can create a claim directly in the Census screen, which then moves to the Claims screen for further processing in the normal manner.

Create a claim in the Census screen

You can create claims directly in the Census screen.

1. On the burger ▤ menu, click **BILLING**.
2. On the toolbar, click **Census**.
3. In the **Ordering Facility** list, select a facility.
4. Select a study in the list, assign the census type, and then click **CREATE CLAIM.**

Export the census queue

You can export the census queue to send your ordering facilities.

1. On the burger ▤ menu, click **BILLING**.
2. On the toolbar, click **Census**.
3. In the **Ordering Facility** list, select a facility.
4. Click the export ⬇ button.
   Result: The census queue appears in your Windows Downloads folder as an Excel file.

Work with reports

Create, view, and deliver reports

Create a billing report

You can create various types of reports based on configurable criteria, and then export them in formats including PDF, XLS, CSV, and XML.

1. On the burger ☰ menu, click **BILLING**.
2. On the top navigation bar, click **Report**, and then select a report type in the list.
   Enter criteria in the fields provided, and then do one of the following.
      - To preview the report, click **VIEW**.
      - To export the report, click the button corresponding to the file format.

Peer review report

See "Create a peer review report."

View your saved reports

You can view open and download reports that you previously saved.

1. On the burger ☰ menu, click the arrow ❯ next to **REPORTS**, and then click **MY REPORTS**.
2. Select a report in the list, and then:
      - Click 🡇 to download
      - Click 👁 to open

Deliver reports

You can follow a special workflow in Exa PACS/RIS to deliver reports. This workflow includes sending images to referring physicians to help them understand the reports.

1. On the burger ☰ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then select **Providers & Resources**.
3. On the **RESOURCE** tab, in the **RESOURCE TYPE** column, click **REFERRING PROVIDER**.
4. Double-click one of the providers in the list, and in the bottom of the screen, click the **LOCATIONS/CONTACTS** tab.
5. Double-click a contact in the list. In the **Contact Information** area, in the **Email** box, type the email address of the provider contact.
6. In the **Reports to Me** area:
   a. Select the **Email Report Link** and **Email Attachment** check boxes
   b. In the **Report Password** box, type a password.
   c. Under **Reports to Group**, select the **Email Report Link** and **Email Attachment** check boxes.
7. Back in the **Contact Information** area, click **SAVE CONTACT**, and then click **SAVE & CLOSE**.
8. In the worklist, click the edit ✎ button of a study.
9. In the edit study screen, in the left pane, click **EXAM INFORMATION**.
10. In the **Ordering Physician** list, on the **ORDER** sub-tab, click a referring physician and then click **SAVE.**
    Note: You can view your sent reports at: Burger menu > SETUP > General > REPORT QUEUE. Records are processed and sent to the specified user or group based on the email service configuration.

Work with Exa Chat

What is Exa Chat?

Exa Chat is a program within Exa PACS/RIS that enables you to securely *chat* (exchange text messages) with other members of your institution. You can hold private chats (instant messaging), or group chats with individuals or departments. You must purchase a license to use Exa Chat.

What is the contact list?

The contact list is contained in the main Exa Chat window that appears in the lower left of the Exa PACS/RIS browser window, and lists chat rooms in which you participated. You can click any room to re-open it. When a user archives a room, it is removed from the contact list.
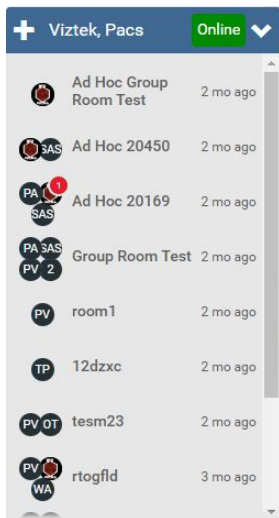
About group (multi-user) chat rooms

Group and *ad hoc* are both types of multi-user chat room. Group chat rooms are managed, and ad hoc chat rooms are not. If you start a private chat and then add a third member, the chat room becomes an ad hoc chat room. The following table summarizes other differences.

Property	Group	Ad hoc
Who can create the room?	The "manager" (person with Group Chats Management permission).	Anyone with Personal Chat Allowed permission.
Who can/remove add members?	The manager. No special rights are required to be added.	Any member can add anyone else with Personal Chat Allowed permission.
Who can delete/archive the room?	The manager.	Only the last remaining member.

Use Exa Chat

Start a new private chat

To start chatting with someone for the first time, you can create a private chat room. After creating a private chat room, it appears in the contact list for future use.

1. On the contact list, click the add ⊞ button.
2. In the **Add room** dialog box, begin typing a contact name, and then select the name from the list. The private chat room window appears to the left of the contacts list.
3. In the box at the bottom of the chat room window, type a message and press **Enter**.

Join a group chat room

You can join a group chat room that was configured in Exa PACS/RIS. See "Add a group chat room."

1. On the contact list, click the add ⊞ button.
2. In the **Add private room** dialog box, start typing the name of the group room, and then select the name from the list. The group chat room window appears to the left of the contacts list.
3. In the box at the bottom of the chat room window, type a message and press **Enter**.

Start a new multi-user chat

To start a group chat, you create a multi-user chat room. After creating the room, it appears in the contact list for future use.

1. On the contact list, click the add ⊞ button.
2. In the **Add Room** dialog box, click **CREATE ROOM**.
3. In the **Create new room** dialog box, type a title for the room, and then click **CREATE NEW ROOM**.
4. The multi-user chat room window appears to the left of the contacts list.
5. In the box at the bottom of the chat room window, type a message and press **Enter**.
6. The message is sent to all members in the chat room.

Minimize or restore chat rooms

- To minimize a chat room, click its minimize ⌄ button.
- To minimize Exa Chat (all chat rooms and the contact list), click the minimize button on the contact list.

- To restore a single chat room or all chat rooms, click the maximize ⌃ button at the bottom of the browser window.

Open a previously used chat room

Each entry in the contact list corresponds to a chat room in which you participated. Click any room in the list to re-open it and re-initiate a chat.

Add a member to a chat room

You can add a new member to an existing chat room. You can also add a group chat room as a "member" of another chat room.

1. On the header of a chat room, click the settings ⚙ button.
2. Click **Add users or Groups**.
3. In the **Add user** dialog box, begin typing a contact name, or a group chat room name, and then select the name from the list.
4. Click **OK**.

Change your status

Your status indicates your availability to chat. You can set a status of Busy (available for emergencies) and DND (do not disturb, do not play sounds). Unless you assign a status manually, Exa Chat automatically assigns a status of Online (available) or Offline (unavailable).

1. On the header of the contact list, click the status button.

2. Select a status.

Add a chat room to your favorites

When you add a chat room to your favorites, it moves to the top of the contact list.

1. Open the chat room that you want to add.
2. In the chat room window header, click the Add to favorites ★ button.

Use an avatar for chat

An avatar is an image such as a photo that represents you in a chat room. To use an avatar in chat, follow the procedure in "Add an avatar" and the avatar will appear in your chat rooms automatically.

Copy from one message to another

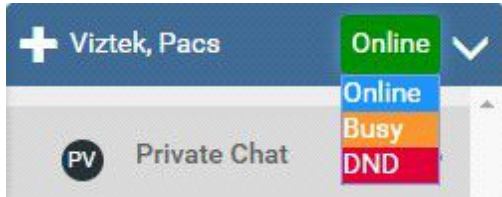You can copy all or part of a message into another message.

- Select all or some text in one message, click Ctrl + C, and then paste into another message.
- Drag a message from one chat window into the message box of another chat window.

Manage Exa Chat

Add user roles for Exa Chat

Administrators must add user roles for Exa Chat. See also "Manage users."

1. On the burger ☰ menu, click **SETUP**.
1. Next to the burger button, click the word in all caps, and then click **User Management**.
2. On the **USER ROLES** tab, click **ADD**.
3. Type a name for the role (such as Chat), and a description, and then click **SAVE.**
4. On the **USER ROLES** tab, double-click the user role you just added.
5. Select one or more of the following check boxes.
   Personal Chat Allowed – Create and join private and ad hoc chat rooms.
   Group Chats Management – Create and join private and multi-user chat rooms.
   Chat – Apply both of the previous rights.
6. Click **SAVE.**

Rename a chat window

You can change the name of an existing chat room.

1. Click Settings ⚙ in the chat room that you want to rename.
2. Type the new title in the box, and then click **SAVE TITLE**.

Archive a chat

To save disk storage space, you can archive your chats. Archiving saves messages older than a pre-configured date to a CSV file, and then removes them from the system. Archiving only works if the system holds more than a pre-configured number of messages.

1. Click Settings ⚙ in the chat room that you want to archive.
2. Click **Archive the chat**.

Use Exa Links

What are Exa Links?

Exa Links are links to Exa PACS/RIS controls that you send to chat members. Recipients can click the Exa Links to open patient charts, studies in the edit study screen or viewer, approved reports, notes, and other assets.

Find and send an Exa Link

If you point to a control in Exa PACS/RIS and its tooltip ends with "··· - Share to Chat," it is an Exa Link.

The following table lists the controls that are available as Exa Links at the time of this writing. More will be added in future versions.

Page	Controls	
Worklist	Study toolbar: Viewer, Edit, Approved Reports	

To send an Exa Link, drag it onto the message box at the bottom of a chat room window, and then press Enter.

Send a document by using an Exa Link

In addition to the Exa Links on the worklist, you can send Exa Links to documents from the Patient Documents screen.

1. On a worklist shortcut menu, click **Attached Files**.
2. In the **Patient Document** dialog box, double-click a document to open it.
3. Drag the **Share to Chat** button into a chat message.

Work with tools

Exa PACS/RIS includes a suite of tools that provide a variety of functionality. Some tools must be installed locally on the client PC (see "Install and configure tools" in the appendix).

Use import tools

Import studies from CD

You can perform a "CD import."

⚠

Ensure that the data to be imported, and the data after import are correct.

Prerequisite: Install OPAL tools (see the appendix).

1. On the burger ☰ menu, click the arrow next to **TOOLS**, and then click **CD IMPORT**.
2. If the "Open Opal Import?" message appears, select the check box, and then click **Open Opal Import**.
3. In the **OpalImport** dialog box, click **Select Files/Folders or DICOMDIR to Import**, and then browse for and select files to import.
4. Enter customization settings and then click **Import**.

Import studies to a specific AE (API mode)

You can import studies to a specific AE.

1. On the worklist, on the **PACS Actions** ⚙ menu, click **Import Images**.
   Note: If the "Open Opal Import?" message appears, select the check box, and then click **Open Opal Import**.
2. In the **OpalImport** dialog box, turn on API mode by typing `1q2w3e4r5t`.
   Note: You only need to perform this step once. API mode will remain on permanently.
3. Select the **Exa API transfer** option.
4. Click **Select Files/Folders or DICOMDIR to Import**, and then browse for and select files to import.
5. Enter customization settings and then click **Import**.

Manage registered portal users

You can manage user accounts on the patient, physician, and referring physician portals.

- On the burger ☰ menu, click **PORTAL REG USERS**.

Appendix

Reference

User reference

Search syntax

Various lists in Exa PACS/RIS have a search bar with column headers that accept search criteria. The following general rules apply when entering search criteria.

In most numeric fields, you can search for any part of the number. For example:

In the account number field, type: 20
Exa PACS/RIS finds: 203, 1203, and 01203.

In a name field (such as patient name or payer name), you can type the full name in the format:

      lastname, firstname
      ⋯but not⋯
      firstname lastname.

In a name field, you can type the first or last name only. For example:

      Type: Anderson

      Exa PACS/RIS finds: Cooper, Anderson
      ⋯and⋯
      Anderson, John.

In a name field you can type all or part of the first or last name, but using as many letters as possible improves accuracy. For example:

      Type: Oswa

      Exa PACS/RIS finds: Oswald, Trevor
      ⋯and⋯
      Davis, Oswald

      However, if you type: Os
      Exa PACS/RIS finds only: Oswald, Trevor.

Keyboard shortcuts for the claim entry screen

When creating or editing claims, the following keyboard shortcuts are available.

Target	Shortcut
Charges sub-tab	Alt + C
Claims sub-tab	Alt + Shift + C
Insurance sub-tab	Alt + I
Additional Info. sub-tab	Alt + A
Billing Summary sub-tab	Alt + B
Payments sub-tab	Alt + P

Target	Shortcut
Cursor moves to the payer name field	Alt + (+)
Previous claim	Alt + Shift + P
Next claim	Alt + Shift + N
Notes screen	Alt + N
Documents and Reports screen	Alt + D
Validate claim	Alt + V
Save All	Alt + S
Close without saving	Esc

Keyboard shortcuts for Exa Trans

When creating or editing claims, the following keyboard shortcuts are available.

Command	Command Text	Shortcut
Remove last dictated piece	undo that delete that scratch that	-
Next variable placeholder	next variable	Alt +]
Previous variable placeholder	previous variable	Alt + [
Capitalize previous word	capitalize that cap that	-
Remove word left of the cursor	remove left	Ctrl + Alt + Back
Start recording		Ctrl + F1
Toggle recording		Ctrl + F3
Stop recording	stop recording	Ctrl + F2

Merge fields

The following table describes the merge fields available in various parts of the program. Some merge fields may not be available in your installation of Exa PACS/RIS depending on added modules, country, and other factors.

1. **SO** = Study/Order; **IN** = Insurance; **PA** = Patient; **PR** = Provider; **ET** = Email Template; **NT** = Notification Templates, **RT** = Report Templates; **SF** = Study Forms; **CF** = Custom Forms; **TT** = Transcription Templates

Merge Field	Formal Name	Scope[1]
FamilyHealthHistory	Family Health History	SO, NT, SF, CF
FollowUps	Follow Ups	SO, NT, SF, CF
Immunizations	Immunizations	SO, NT, SF, CF
LabResults	Lab Results	SO, NT, SF, CF

Merge Field	Formal Name	Scope[1]
Medications	Medications	SO, NT, SF, CF
Referrals	Referrals	SO, NT, SF, CF
PreLabResults	Pre Lab Results	SO, NT, SF, CF
Problems	Problems	SO, NT, SF, CF
VitalSigns	Vital Signs	SO, NT, SF, CF
Age	Age	PA, ET, NT, SF, CF
AgeatDOS	Age at DOS	PA, ET, NT, SF, CF
Address1	Address 1	PA, ET, NT, SF, CF
Address2	Address 2	PA, ET, NT, SF, CF
Ciy	City	PA, ET, NT, SF, CF
State	State	PA, ET, NT, SF, CF
ZipCode	Zip Code	PA, ET, NT, SF, CF
DOB	DOB	PA, ET, NT, SF, CF
FirstName	First Name	PA, ET, NT, SF, CF
Fullname	Full Name	PA, ET, NT, SF, CF
Gender	Gender	PA, ET, NT, SF, CF
Race	Race	PA, ET, NT, SF, CF
Ethnicity	Ethnicity	PA, ET, NT, SF, CF
HomePhone	Home Phone	PA, ET, NT, SF, CF
MobilePhone	Mobile Phone	PA, ET, NT, SF, CF
WorkPhone	Work Phone	PA, ET, NT, SF, CF
Lastname	Last Name	PA, ET, NT, SF, CF
Middlename	Middle Name	PA, ET, NT, SF, CF
mrn	MRN	PA, ET, NT, SF, CF
uli	ULI	PA, ET, NT, SF, CF
ssn	SSN	PA, ET, NT, SF, CF
Suffix	Suffix	PA, ET, NT, SF, CF
Weight	Weight	PA, ET, NT, SF, CF
Height	Heigh	PA, ET, NT, SF, CF
Employer	Employer	PA, ET, NT, SF, CF
PreferredLanguage	Preferred Language	PA, ET, NT, SF, CF
Username		PA, ET, NT,
Password		PA, ET, NT,
ApprovingPhysicianAddress1	Approving Physician Address 1	PR, ET, NT, SF, CF

Merge Field	Formal Name	Scope[1]
ApprovingPhysicianAddress2	Approving Physician Address 2	PR, ET, NT, SF, CF
ApprovingPhysicianCity	Approving Physician City	PR, ET, NT, SF, CF
ApprovingPhysicianFirstName	Approving Physician First Name	PR, ET, NT, SF, CF
ApprovingPhysicianFullName	Approving Physician Full Name	PR, ET, NT, SF, CF
ApprovingPhysicianLastName	Approving Physician Last Name	PR, ET, NT, SF, CF
ApprovingPhysicianMiddleName	Approving Physician Middle Name	PR, ET, NT, SF, CF
ApprovingPhysicianState	Approving Physician State	PR, ET, NT, SF, CF
ApprovingPhysicianSuffix	Approving Physician Suffix	PR, ET, NT, SF, CF
CCProv1Addr1	CC Provider 1 Address 1	PR, ET, NT, SF, CF
CCProv1Addr2	CC Provider 1 Address 2	PR, ET, NT, SF, CF
CCProv1City	CC Provider 1 City	PR, ET, NT, SF, CF
CCProv1Name	CC Provider 1 Name	PR, ET, NT, SF, CF
CCProv1State	CC Provider 1 State	PR, ET, NT, SF, CF
CCProv1Zip	CC Provider 1 Zip	PR, ET, NT, SF, CF
CCProv1Alerts	CC Provider 1 Alerts	PR, ET, NT, SF, CF
CCProv2Addr1	CC Provider 2 Address 1	PR, ET, NT, SF, CF
CCProv2Addr2	CC Provider 2 Address 2	PR, ET, NT, SF, CF
CCProv2City	CC Provider 2 City	PR, ET, NT, SF, CF
CCProv2Name	CC Provider 2 Name	PR, ET, NT, SF, CF
CCProv2State	CC Provider 2 State	PR, ET, NT, SF, CF
CCProv2Zip	CC Provider 2 Zip	PR, ET, NT, SF, CF
CCProv2Alerts	CC Provider 2 Alerts	PR, ET, NT, SF, CF
CCProv3Addr1	CC Provider 3 Address 1	PR, ET, NT, SF, CF
CCProv3Addr2	CC Provider 3 Address 2	PR, ET, NT, SF, CF
CCProv3City	CC Provider 3 City	PR, ET, NT, SF, CF
CCProv3Name	CC Provider 3 Name	PR, ET, NT, SF, CF
CCProv3State	CC Provider 3 State	PR, ET, NT, SF, CF
CCProv3Zip	CC Provider 3 Zip	PR, ET, NT, SF, CF
CCProv3Alerts	CC Provider 3 Alerts	PR, ET, NT, SF, CF
CCProv4Addr1	CC Provider 4 Address 1	PR, ET, NT, SF, CF
CCProv4Addr2	CC Provider 4 Address 2	PR, ET, NT, SF, CF
CCProv4City	CC Provider 4 City	PR, ET, NT, SF, CF
CCProv4Name	CC Provider 4 Name	PR, ET, NT, SF, CF

Merge Field	Formal Name	Scope[1]
CCProv4State	CC Provider 4 State	PR, ET, NT, SF, CF
CCProv4Zip	CC Provider 4 Zip	PR, ET, NT, SF, CF
CCProv4Alerts	CC Provider 4 Alerts	PR, ET, NT, SF, CF
CCProv5Addr1	CC Provider 5 Address 1	PR, ET, NT, SF, CF
CCProv5Addr2	CC Provider 5 Address 2	PR, ET, NT, SF, CF
CCProv5City	CC Provider 5 City	PR, ET, NT, SF, CF
CCProv5Name	CC Provider 5 Name	PR, ET, NT, SF, CF
CCProv5State	CC Provider 5 State	PR, ET, NT, SF, CF
CCProv5Zip	CC Provider 5 Zip	PR, ET, NT, SF, CF
CCProv5Alerts	CC Provider 5 Alerts	PR, ET, NT, SF, CF
ProviderSignature	Provider Signature	PR, ET, NT, SF, CF
ReadingPhysicianAddress1	Reading Physician Address 1	PR, ET, NT, SF, CF
ReadingPhysicianAddress2	Reading Physician Address 2	PR, ET, NT, SF, CF
ReadingPhysicianCity	Reading Physician City	PR, ET, NT, SF, CF
ReadingPhysicianFirstName	Reading Physician First Name	PR, ET, NT, SF, CF
ReadingPhysicianFullName	Reading Physician Full Nae	PR, ET, NT, SF, CF
ReadingPhysicianLastName	Reading Physician Last Name	PR, ET, NT, SF, CF
ReadingPhysicianMiddleName	Reading Physician Middle Name	PR, ET, NT, SF, CF
ReadingPhysicianState	Reading Physician State	PR, ET, NT, SF, CF
ReadingPhysicianSuffix	Reading Physician Suffix	PR, ET, NT, SF, CF
Ref_PhyAddress1	Referring Physician Address 1	PR, ET, NT, SF, CF
Ref_PhyAddress2	Referring Physician Address 2	PR, ET, NT, SF, CF
Ref_PhyCity	Referring Physician City	PR, ET, NT, SF, CF
Ref_PhyFax	Referring Physician Fax	PR, ET, NT, SF, CF
Ref_PhyFirstName	Referring Physician First Name	PR, ET, NT, SF, CF
Ref_PhyFullname	Referring Physician Full Name	PR, ET, NT, SF, CF
Ref_PhyHomePhone	Referring Physisican Home Phone	PR, ET, NT, SF, CF
Ref_PhyLastName	Referring Physician Last Name	PR, ET, NT, SF, CF
Ref_PhyMiddleInitial	Referring Physician Middle Initial	PR, ET, NT, SF, CF
Ref_PhyNameOrderFMLS	Referring Physician Name Order First Middle Last Suffix	PR, ET, NT, SF, CF
Ref_PhyState	Referring Physician State	PR, ET, NT, SF, CF
Ref_PhySuffix	Referring Physician Suffix	PR, ET, NT, SF, CF

Merge Field	Formal Name	Scope[1]
Ref_PhyZip	Referring Physician zip	PR, ET, NT, SF, CF
Ref_PhyMobileNo	Referring pHysician Mobile Number	PR, ET, NT, SF, CF
Ref_PhyOfficeNo	Referring Physician Office Number	PR, ET, NT, SF, CF
Ref_PhyAlerts	Referring Physician Alerts	PR, ET, NT, SF, CF
Report Link	Report Link	PR, ET, NT, SF, CF
SignatureText	Signature Text	PR, ET, NT, SF, CF
PreApprovedSignatureTExt	PreApproved Signature Text	PR, ET, NT, SF, CF
preApprovedProviderSignature	PreApproved Provider Signature	PR, ET, NT, SF, CF
RadiologistFullName	Radiologist Full Name	PR, ET, NT, SF, CF
TechnologistFullName	Technologist Full Name	PR, ET, NT, SF, CF
SignatureBlockText	Signature Block Text	PR, ET, NT, SF, CF
preApprovedSignatureBlockText	PreApproved Signature Block Text	PR, ET, NT, SF, CF
AttorneyFirstName	Attorney First Name	PR, ET, NT, SF, CF
AttorneyFullName	Attorney Full Name	PR, ET, NT, SF, CF
AttorneyLastName	Attorney Last Name	PR, ET, NT, SF, CF
AttorneyMiddleName	Attorney Middle Name	PR, ET, NT, SF, CF
AttorneySuffix	Attorney Suffix	PR, ET, NT, SF, CF
AttorneyAddress1	Attorney Address 1	PR, ET, NT, SF, CF
AttorneyAddress2	Attorney Address 2	PR, ET, NT, SF, CF
AttorneyCity	Attorney City	PR, ET, NT, SF, CF
AttorneyState	Attorney State	PR, ET, NT, SF, CF
AttorneyZip	Attorney Zip	PR, ET, NT, SF, CF
AttorneyPhoneNo	Attorney Phone Number	PR, ET, NT, SF, CF
AttorneyEmail	Attorney Email	PR, ET, NT, SF, CF
AttorneyFaxNo	Attorney Fax Number	PR, ET, NT, SF, CF
AppointmentTypeCode	Appointment Type Code3	SO, RT, ET, NT, SF, CF
AppointmentTypeDescription	Appointment Type Description	SO, RT, ET, NT, SF, CF
ExpectedArrivalTime	Expected Arrival Time	SO, RT, ET, NT, SF, CF
AccessionNo	Accession Number	SO, RT, ET, NT, SF, CF
ApprovedDate	Approved Date	SO, RT, ET, NT, SF, CF
PreApprovedDate	PreApproved Date	SO, RT, ET, NT, SF, CF
TranscribedDate	Transcribed Date	SO, RT, ET, NT, SF, CF

Merge Field	Formal Name	Scope[1]
BodyPart	Body Part	SO, RT, ET, NT, SF, CF
Department	Department	SO, RT, ET, NT, SF, CF
DictationDate	Dictation Date	SO, RT, ET, NT, SF, CF
ICDCode	ICD Code	SO, RT, ET, NT, SF, CF
ICDDescripton	ICD Description	SO, RT, ET, NT, SF, CF
StudyICDCode	Study ICD Code	SO, RT, ET, NT, SF, CF
StudyICDDescription	Study ICD Description	SO, RT, ET, NT, SF, CF
Institution	Institution	SO, RT, ET, NT, SF, CF
Modality	Modality	SO, RT, ET, NT, SF, CF
ModalityRoom	Modality Room	SO, RT, ET, NT, SF, CF
OrderedBy	Ordered By	SO, ET, NT, SF, CF
OrderingFacility	Ordering Facility	SO, ET, NT, SF, CF
Orientation	Orientation	SO, ET, NT, SF, CF
PatientLocation	Patient Location	SO, ET, NT, SF, CF
PlaceOfService	Place of Service	SO, ET, NT, SF, CF
Priority	Priority	SO, ET, NT, SF, CF
ProcedureCode	Procedure Code	SO, ET, NT, SF, CF
ProcedureCodes	Procedure Codes	SO, ET, NT, SF, CF
ProcedureCodestabular	Procedure Codes Tabular	SO, ET, NT, SF, CF
ProcedureName	Procedure Name	SO, ET, NT, SF, CF
ProcedureNames	Procedure Names	SO, ET, NT, SF, CF
ProcedureNamesTabular	Procedure Names Tabular	SO, ET, NT, SF, CF
ReasonForStudy	Reason for Study	SO, ET, NT, SF, CF
RequestingDate	Requesting Date	SO, ET, NT, SF, CF
RoomNo	Room Number	SO, ET, NT, SF, CF
STAT	STAT	SO, ET, NT, SF, CF
StudyDate	Study Date	SO, ET, NT, SF, CF
StudyDescription	Study Description	SO, ET, NT, SF, CF
StudyFlag	Study Flag	SO, ET, NT, SF, CF
StudyReceivedDate	Study Received Date	SO, ET, NT, SF, CF
TAT	TAT	SO, ET, NT, SF, CF
TranscribingUser	Trascribing User	SO, ET, NT, SF, CF
VehicleName	Vehicle Name	SO, ET, NT, SF, CF
studyUID	Study UID	SO, ET, NT, SF, CF

Merge Field	Formal Name	Scope[1]
StudyFormsignature	Study Form Signature	SO, ET, NT, SF, CF
CustomFormSignature	Custom Form Signature	SO, ET, NT, SF, CF
ExamPrepInstructions	Exam Prep Instructions	SO, ET, NT, SF, CF
CPTCode	CPT Code	SO, ET, NT, SF, CF
CPTName	CPT Name	SO, ET, NT, SF, CF
visit_no	Visit Number	SO, ET, NT, SF, CF
CPTCodes	CPT Codes	SO, ET, NT, SF, CF
CPTNames	CPT Names	SO, ET, NT, SF, CF
CPTCodesTabular	CPT Codes Tabular	SO, ET, NT, SF, CF
CPTNamesTabular	CPT Names Tabular	SO, ET, NT, SF, CF
DateofInjury	Date of Injury	SO, ET, NT, SF, CF
Allergies	Allergies	ET, NT, SF, CF
CompanyName	Company Name	ET, NT, SF, CF
CurrentDate	Current Date	ET, NT, SF, CF
CurrentTime	Current Time	ET, NT, SF, CF
DateAndTime	Date and Time	ET, NT, SF, CF
OfficeAddress1	Office Address 1	ET, NT, SF, CF
OfficeAddress2	Office Address 1	ET, NT, SF, CF
OfficeCity	Office City	ET, NT, SF, CF
FacilityLogo	Facility Logo	ET, NT, SF, CF
FacilityContactNo	Facility Contact Number	ET, NT, SF, CF
OfficeName	Office Name	ET, NT, SF, CF
OfficeState	Office State	ET, NT, SF, CF
Zip	Zip	ET, NT, SF, CF
FormalName	Formal Name	ET, NT, SF, CF
PracticeType	Practive Type	ET, NT, SF, CF
PrimaryInsurance	Primary Insurance	IN, ET, NT, SF, CF
PrimaryAddress	Primary Address	IN, ET, NT, SF, CF
PrimaryCity	Primary City	IN, ET, NT, SF, CF
PrimaryState	Primary State	IN, ET, NT, SF, CF
PrimaryZipCode	Primary Zip Code	IN, ET, NT, SF, CF
PrimaryPhone	Primary Phone	IN, ET, NT, SF, CF
PrimaryFax	Primary Fax	IN, ET, NT, SF, CF
PrimarySubscriber	Primary Subscriber	IN, ET, NT, SF, CF

Merge Field	Formal Name	Scope[1]
PrimaryDOB	Primary DOB	IN, ET, NT, SF, CF
PrimaryRelationship	Primary relationship	IN, ET, NT, SF, CF
PrimaryPolicyNo	Primary Policy Number	IN, ET, NT, SF, CF
PrimaryGroupNo	Primary Group number	IN, ET, NT, SF, CF
HealthNumber	Health Number	IN, ET, NT, CF
VersionCode	Version Code	IN, ET, NT, CF
SecondaryInsurance	Secondary Insurance	IN, ET, NT, SF, CF
SecondaryAddress	Secondary Address	IN, ET, NT, SF, CF
SecondaryCity	Secondary City	IN, ET, NT, SF, CF
SecondaryState	Secondary State	IN, ET, NT, SF, CF
SecondaryZipCode	Secondary Zip Code	IN, ET, NT, SF, CF
SecondaryPhone	Secondary Phone	IN, ET, NT, SF, CF
SecondaryFax	Secondary Fax	IN, ET, NT, SF, CF
Secondarysubscriber	Secondary Subscriber	IN, ET, NT, SF, CF
SecondaryDOB	Secondary DOB	IN, ET, NT, SF, CF
SecondaryRelatoinship	Secondary Relationship	IN, ET, NT, SF, CF
secondaryPolicyNo	Secondary Policy Number	IN, ET, NT, SF, CF
SecondaryGroupNo	Secondary Group Number	IN, ET, NT, SF, CF
FacilityNotes	Facility Notes	NT, SF, RT
FacilityFax	Facility Fax Number	RT, SF, CF, ET, NT
FacilityEmail	Facility Email Address	RT, SF, CF, ET, NT
Ord_PhyAddress1	Ordering Phys. Street Address1	RT, TT, SR, CF, ET, NT, CS
Ord_PhyAddress2	Ordering Phys. Street Address2	RT, TT, SR, CF, ET, NT, CS
Ord_PhyCity	Ordering Phys. City	RT, TT, SR, CF, ET, NT, CS
Ord_PhyFirstName	Ordering Phys. First Name	RT, TT, SR, CF, ET, NT, CS
Ord_PhyFullName	Ordering Phys. Full Name	RT, TT, SR, CF, ET, NT, CS
Ord_PhyLastName	Ordering Phys. Last Name	RT, TT, SR, CF, ET, NT, CS
Ord_PhyMiddleName	Ordering Phys. Middle Name	RT, TT, SR, CF, ET, NT, CS
Ord_PhyState	Ordering Phys. State	RT, TT, SR, CF, ET, NT, CS
Ord_PhySuffix	Ordering Phys. Suffix	RT, TT, SR, CF, ET, NT, CS
Ord_PhyZip	Ordering Phys. Postal Code	RT, TT, SR, CF, ET, NT, CS
Non-ProprietaryName	Non-Proprietary Name	RT, TT, SF, CF
AmountUsed	Amount Used	RT, TT, SF, CF
Route	Route	RT, TT, SF, CF

Merge Field	Formal Name	Scope[1]
Supv_PhyAddress1	Supervising phys. Street Adrs. 1	RT, TT, SF, CF, ET, NT, CS
Supv_PhyAddress2	Supervising phys. Street Adrs. 2	RT, TT, SF, CF, ET, NT, CS
Supv_PhyCity	Supervising phys. City	RT, TT, SF, CF, ET, NT, CS
Supv_PhyFirstName	Supervising phys. First Name	RT, TT, SF, CF, ET, NT, CS
Supv_PhyFullName	Supervising phys. Full Name	RT, TT, SF, CF, ET, NT, CS
Supv_PhyLastName	Supervising phys. Last Name	RT, TT, SF, CF, ET, NT, CS
Supv_PhyMiddleName	Supervising phys. Middle Name	RT, TT, SF, CF, ET, NT, CS
Supv_PhyState	Supervising phys. State	RT, TT, SF, CF, ET, NT, CS
Supv_PhySuffix	Supervising phys. Suffix	RT, TT, SF, CF, ET, NT, CS
Supv_PhyZip	Supervising phys. ZIP	RT, TT, SF, CF, ET, NT, CS
Canada only:	Health Card Number	RT, SF, CF, ET, NT

User rights

The following table describes the rights that an administrator can assign to a user role.

Note: Shaded rows indicate that the right is not currently in use.

Right	Description
Billing/Setup	
Billing Codes	Allows creating and editing billing codes
Billing Class	Allows creating and editing billing classes
Claim Status	Allows creating and editing claim statuses
CAS Group Code	Allows creating and editing CAS group codes
Provider ID Code Qualifier	Allows mapping provider ID code qualifiers to billing providers
Payment Reason	Allows editing payment reasons such as co-pay, deductible, and payment plan
CAS Reason Code	Allows creating and editing CAS reason codes
Status Color Code	Allows adding and editing colors for payment, claim, and billed statuses
Supporting Text Templates	Allows mapping of preconfigured supporting text to specific service codes.
Insurance EDI Mapping	Allows insurance mapping, such as billing method and clearinghouse
Adjustment Codes	Allows adding and editing adjustment codes
Billing Provider	Allows adding and editing billing providers
Billing Messages	Allows editing billing messages that print on statements
Billing Validation	Allows selecting the data fields that are validated during claim validation

Right	Description
Printer Templates	Allows editing some settings in printer templates such as page margins
EDI Request Templates	Allows creating and editing EDI request templates.
Clearing House	Allows entering clearinghouse information
Autobilling	Allows creating auto-billing profiles for automatic generation of claims
CollectionsProcess	Allows configuring the automatic claim collections process
Billing	
Claims	Allows opening the claims screen
Edit Claim	Allows opening the edit claim screen
Claim Inquiry	Allows access to patient claim information
All Insurances	All insurances
Coordination of Benefits	Allows coordinating benefits
Explanation of Benefits	Allows access to billing ERA
ERA Inbox	Allows opening the ERA inbox
EOB Claims Process	Allows opening the EOB tab, and uploading and processing electronic payment files
File Insurance	Allows managing billing claims
Patient Claim	Allows viewing a patient's claim history within Billing, and makes available the Inquiry buttons on the Patient Information tab in the patient chart and edit study screen
Patient Report	Allows opening patient reports and documents within Billing
Payments	Allows viewing and processing payments
Apply Payments	Allows applying payments to claims
Refund	Allows processing refunds
Back to Ready to Validate	Allows changing claim status to Ready to Validate
Claim Validate	Allows validating claims
Create/Split Claim	Allows splitting a claim with more than one charge
Delete Payment	Allows deleting payment records
Delete Claim	Allows deleting claims
File Management	Allows opening the file management screen in Canadian versions

Right	Description
Edit Claim Status	Allows manually changing claim statuses
Invoice Activity Statement	Allows viewing and printing the activity statement
Query Claim	Allows querying of claims.
Adjust to Paid in Full	Adds a shortcut menu command to pay a claim in full.
Census	Allows viewing the Census screen.
	All rights in this category allow creating the corresponding report
Billing/Reports	
Aged AR Summary	
Aged AR Detail	
Charges	
Claim Activity	
Claim Transaction	
Collections	
Credit Balance Encounters	
Diagnosis Count	
Modality Summary	
Monthly Recap	
Patient Statement	
Payer Mix	
Payment	
Claim Inquiry	
Patients By Insurance	
Payments by Insurance Company	
Procedure Analysis by Insurance	
Procedure Count	
Reading Provider Fees	
Referring Provider Count	
Referring Provider Summary	
Transaction Summary	
Patient Activity Statement	
Payments Realization Rate Analysis	

Right	Description
Send claims to collections	Allows using automatic collections to change claim statuses to "Claim in Collection," and make other changes.
Billing/Log	
Billing User Log	Allows viewing the billing user log
Bulling Audit Log	Allows viewing the billing audit log
Chat	
Personal Chat Allowed	Allows using Exa Chat to send and receive messages with individual users (private chat)
Group Chats Management	Allows creating and managing group chat rooms
Dashboard	
Dashboard	Allows opening the dashboard
Dictation	
Approve	Allows approving a dictated study report
Approve (Addendum)	Allows approving an addendum (Edit or Addition) on a dictated study report, and changing a study's status from Approved to Approved-Coded.
Dictation	Allows creating a dictated addendum (Edit or Addition) on an approved study report
Dictation (Addendum)	Allows creating a dictated report
Dictation (Delete)	Allows deleting a dictated report
Submit For Review	Allows submitting an addendum for review on a dictated report
Submit For Review (Addendum)	Allows submitting a dictated report for review
Transcription (Addendum)	Allows creating an addendum by using Web Trans
Dispatching Dashboard	
Dispatching Dashboard	Allows users of Mobile RAD to open the dispatching dashboard
General	
AE Scripts	Allows managing AE scripts to receive, send, or print studies
API Users	Allows adding and editing API users and rights
Application Entities	Allows configuring application entities (AE).
Assign Study to Users	Allows assigning studies to specific users from the worklist
Company	Allows editing general settings including those related to: company contact and billing, apps, MRN, AE filters, LDAP, Rcopia, and HL7
File Stores	Allows selecting folders to store various data (mainly images) on the server
Notification	Allows adding notifications that appear on the dashboard

Right	Description
Tasks	Allows entering tasks that appear on the My Tasks gadget of the dashboard
HL7	
HL7 Global Config	Allows viewing global HL7 configurations
HL7 Queue	Allows viewing the HL7 Outbound (Sender) log
HL7 Receiver Log	Allows viewing the HL7 Inbound (Receiver) log
Home	
Allow Reset Approved studies	Allows resetting approved studies to Scheduled status
Allow Reset of Canceled and No Show Studies	Allows resetting studies from Cancelled or No Show status to Scheduled status
Appointment Confirmation	Allows viewing the Appointment Confirmation screen
Can Edit Public Filter	Allows editing public filters
Can Edit Public Template	Allows editing public templates
Cancel Reasons	Allows cancelling appointments
CD Burn	Allows burning DICOM images to a CD or external device
DICOM View	Allows switching between DICOM preview or priors on the worklist
DICOM Viewer	Allows opening images on the Exa PACS/RIS viewer
External App Icon	Allows launching third party applications from the worklist
Image Preview	Allows previewing images on the worklist
Import Images	Allows importing images by using the PACS Actions menu
Import Images from Portal	Allows importing images from the provider or attorney portal into Exa PACS/RIS
Link DICOM Study	Allows linking a DICOM study to another study
Marketing Rep Dashboard	Allows opening the Marketing Representative dashboard
Merge Study	Allows merging and splitting DICOM studies and RIS orders
Technologist	Allows associating a technologist to an order
Opal Viewer	Allows viewing studies with the Exa PACS/RIS viewer
Order additional	Allows opening the Additional Information tab within the edit study screen
Order ICD	Allows adding ICD codes to an order
Order Referring Provider	Allows opening the Referring Provider tab within the edit study screen
Order Studies	Allows opening the Exam Information tab within the edit study screen
QC Delete	Allows deleting DICOM studies within the QC tab
QC Edit	Allows editing some fields of a DICOM study within the QC tab
QC Move to Studies	Allows manually moving a DICOM study from the QC tab to the All Studies tab

Right	Description
QC Reconciliation	Allows manually matching or reconciling a DICOM study to a RIS order
Worklist Menu	Allows opening the worklist shortcut menu
Send Fax	Allows sending approved reports and study forms by fax
Send Studies	Allows sending a DICOM study to another AE from the worklist
Show Priors	Allows viewing a patients' priors in a separate study filter on the worklist
Studies	Allows accessing Exa PACS/RIS
Study Delete	Allows deleting studies from a patient chart
Study Purge	Allows permanently deleting a study
Study Edit	Allows opening the edit study screen
Study Forms	Allows opening the Study Forms tab within the edit study screen
Change Status	Allows changing the status of a study
Log	
API Log	Allows viewing the API log, which tracks API activity
Audit Log	Allows viewing the Audit log, which tracks system-wide activity
Rcopia Log	Allows viewing the Rcopia log, which shows Rcopia activity
Eligibility Log	Allows viewing the Eligibility log
User Log	Allows viewing the User log, which tracks system-wide user activity
Patient	
Activity Log	Allows viewing the Activity log within the patient chart and edit study screen
Advanced Search	Allows expanded searching of patients by age, allergies, lab results, problems, sex, medications, vital signs, smoking status, and race/ethnicity
Allergies	Allows viewing the Allergies tab in the edit study screen, and editing patient allergies
Allergies (Read only)	Allows viewing the Allergies tab in the edit study screen (only).
Clinical Summary Transmit	Allows creating, viewing, and transmitting the Clinical Visit Summary/CCD file
Export CCD	Allows encrypting and downloading of patient charts for physician referrals
Family Health History	Allows completing the Family Health History form for a patient's first-degree relatives
Film Tracking	Allows check-out and tracking for 'hard' films from the library
Immunization	Allows viewing patient immunization records
Immunization (Read Only)	Allows adding and editing patient immunization records
Lab Orders	Allows adding, submitting, editing, and deleting laboratory tests and results records
Lab Orders (Read Only)	Allows viewing laboratory tests and results records

Right	Description
Medications	Allows adding, editing, and deleting prescribed medications, supplements, and OTC products through Rcopia
Medications (Read Only)	Allows viewing prescribed medications, supplements, and OTC products through Rcopia
Merge Patients	
Outside Referrals	Allows importing CCD/CCR files into the patient chart from the referring provider
Patient Alerts	Allows selecting alerts or adding custom alerts and notes to a patient chart
Patient Arrival Worklist	Allows viewing the patient arrival worklist when patients use the kiosk to check in
Patient Clinical Rules	Allows creating clinical support rules
Patient Documents	Allows uploading and scanning documents to a study or patient
Patient Encounter	Allows viewing fees associated with CPT codes and associated fees or charges
Patient Guarantor	Allows adding a guarantor to a patient's insurance
Patient Information	Allows opening the Patient Information tab in the patient chart and edit study screen
Patient Insurance	Allows opening the Insurance tab in the patient chart and edit study screen
Patient Messages	Allows managing the list of messages sent from a patient send from the patient portal
Patient Prescriptions	Allows submitting prescriptions to a pharmacy, formulary checking, and adding, editing, and deleting prescribed medications through Rcopia
Patient Prescriptions (Read Only)	Allows viewing of prescribed medications through Rcopia
Patient Search	Allows searching for patients from the Patient tab in the patient chart
Patient Studies	Allows opening the Studies tab within the patient chart and edit study screen
Patient Orders	Allows viewing the Orders tab within the patient chart
Payment History	Allows opening the Payment History tab in the patient chart
Pending Follow-ups	Allows viewing follow-up appointments
Pending Referrals	Allows viewing referrals
Problems	Allows editing in the Problems tab in the edit study screen (to add and edit diagnosis codes)
Problems (Read Only)	Allows viewing the Problems tab in the edit study screen
To Be Reviewed	Allows opening the To Be Reviewed tab in the patient chart.
Transition of Care	Allows exporting a CCD file and sending it to a referring physician via email
Vital Sign (read Only)	Allows viewing a patient's vital signs on the edit study screen

Right	Description
Vital Signs	Allows adding and editing a patient's vital signs on the edit study screen
Patient Claim Inquiry	Allows viewing patient claim information
Patient Claim Inquiry (Read Only)	Allows viewing patient claim information
VIP	Allows designating patients as VIPs
Peer Review	
Peer Review Allowance	Allows managing automatic peer review assignments
Peer Review Manual Appointment	Allows manually assigning peer reviews from the worklist
Peer Review Operational	Allows generating the peer review operational report
Portal Registered Users	
Portal Registered Users	Allows viewing the list of patients who registered for a portal account
Reports	**All rights in this category allow creating the corresponding report**
My Reports	
Completed Schedules	
Date of Service Payment Summary	
Export Completed Studies	
Export Peer Review	
Insurance Balance Aging	
Marketing Rep Activities	
Monthly/Daily Study Goals	
Patients Worksheet	
Referrals Variance	
Referring Physician Study Count	
Report Filter	
Report Provider	

Right	Description
Relative Value Units	
Scheduler Activity	
Studies Breakdown	
Studies by Modality	
Studies by Modality Room	
Modality Breakdown	
Transcription Study Count	
Turnaround Time (TAT) – Calculated	
Fees by Facility and Modality	
Fees by Radiologist and Modality	
Unfinished Studies	
Unsigned Orders	
STAT Tracking	
Insurance vs LOP	
Marketing Report Export	
Technologist Productivity	
Audit Trial	
Schedule	
Allow Double Booking	Allows double-booking an appointment if available for the facility
Allow to edit Accession	Allows editing study accession numbers
Approved Report	Allows viewing approved radiology reports
Assign Vehicle	Allows assigning a vehicle to a study for Mobile Rad

Right	Description
Available Slots	Allows using the Find/Available Slots screens
Billing	Allows viewing information from the edit study screen
Charge and Payments	Allows opening the Charges and Payments tab within the edit study screen
TOS Payments	Allows opening the Payments area of the program
Patient Payment History	Allows viewing patient payment history and printing payment receipts
Chief Complaints	Allows adding and editing chief complaints in the patient chart
Chief Complaints (Read Only)	Allows viewing chief complaints in the patient chart
Clinical Overview	Allows opening the patients clinical overview
DICOM Edit	Allows editing DICOM information within the QC and Exam Information tabs within the edit study screen
Education Material	Allows opening the Educational Material tab in the edit study screen
Follow Ups	Allows scheduling follow-up appointments in the Follow Up tab in the edit study screen
Follow Ups (Read Only)	Allows viewing follow-up appointments on the Follow Up tab in the edit study screen
Insurance Authorization	Allows adding and editing insurance authorizations for studies
Medical History	Allows adding, editing, and updating patient medical histories
Medical History (Read Only)	Allows viewing patient medical histories
New Order	Allows creating new orders
Notes	Allows entering study notes, patient notes, schedule notes, reasons for studies, and call log entries
Notes (Read Only)	Allows viewing study notes, patient notes, schedule notes, reasons for studies, and call log entries
Order Forms	Allows adding custom forms to orders from the Custom Forms tab in the edit study screen
Order Forms (Read Only)	Allows viewing custom forms added to a study from the Custom Forms tab in the edit study screen
Order Images	Allows ordering images or reports from the Studies tab in the patient chart
Order Summary	Allow opening the Summary tab in the edit study screen
Ordering Physician Search	Allows using the magnifying glass to search the Provider Setup screen and NPPES website for an ordering physician to add to an order
Quick Block	Allows creating a quick block (schedule block) from the schedule book
Patient Demographics	Allows editing information in the Patient Information tab in the patient chart and edit study screen
Priority	Allows assigning priority to the study from the worklist and in the Additional Information tab within the edit study screen
Recent Schedules	Allows scheduling/copying appointments in the Recent Schedules screen if available for the facility

Right	Description
Recent Schedules (Read Only)	Allows viewing appointments in the Recent Schedules screen if available for the facility
Reference Document	Allows assigning a reference document to an order and providing it to the patient
Referrals	Allows entering information for referrals to another provider
Schedule Book	Allows viewing the schedule book
Schedule in Non-working time slot	Allows scheduling appointments in non-working time slots from the schedule book
Stat	Allows setting STAT levels for a study or order from the worklist
Status Validation	Allows validating a study in the Validation screen when validation rules are set within the Study Status workflow
Study CPT Update	Allows updating the CPT of a study
Study Education Material	Allows opening the Educational Material tab in the edit study screen
Teaching Study	Allows creating a DICOM teaching study from the worklist and within the viewer
Transcription	Allows editing report transcriptions
ExaTrans2 Multipanel	Allows using Exa Trans2 in the multi-panel, and using the multi-panel without Exa Trans2.
Vehicle Assignments	Allows viewing the list of scheduled/dispatched vehicles in using Mobile Rad
Setup	
Appointment Types	Allows adding, editing, and deleting appointment types
Body Parts	Allows adding and editing body part names
Cognitive Status	Allows adding, editing, and deleting cognitive statuses
CPT	Allows manually adding, editing, and importing procedure codes
Custom Forms	Allows adding, editing, and deleting custom forms, and attaching them to studies
DB Totals	Allows using the DB Totals function
DICOM Receiver Rule	Allows creating and managing DICOM receiver rules
DM List	Allows viewing the DM Manager and list of DMs
DM New	Allows creating a new view in the DM Manager
EDI Translations	Allows creating and managing EDI translations
Editor Template	Allows creating, editing, and deleting Editor templates
EDI Rule	Allows creating and managing EDI rules
Email Template	Allows creating and assigning email templates for the Confirmation screen

Right	Description
Notification Templates	Allows creating and assigning templates sent to referring physicians
Cover Sheets	Allows creating and assigning cover sheets for approved reports
Exam Authorization	Allows opening the Exam Authorization tab
Export Summary	Allows exporting summary totals
Facility	Allows adding, editing, and deactivating facilities
Market	Allows configuring regional markets
Fee schedule	Allows creating and editing billing fee schedules and contracts
Facility Fee Schedule	Allows creating a fee schedule based on facility and modality for the Fees by Facility and Modality report
Provider Pay Schedule	Allows creating a pay schedule for radiologists, which is used in the Fees by Radiologist and Modality report
Provider Location Information	Allows managing provider location information
Form Builder	Allows creating and editing electronic study forms, and managing their attachment
Form Builder	Allows
Functional Status	Allows adding, editing, and deleting functional statuses
Gadgets	Allows adding, arranging, and viewing gadgets within the user's dashboard
Hanging Protocol Groups	Allows editing DM (hanging protocol) settings for user groups, modalities, and other categories
SR Report Queue	Allows opening the Structured Report Queue tab, which shows the status of outbound DICOM SRs
Issuers	Allows adding and editing issuers of patient IDs
ICD	Allows adding, reloading, and importing ICD, SNOWMED, and LOINC code files
Insurance Provider	Allows adding, editing, and deleting insurance providers and assigning them to a facility
Matching Rules	Allows creating rules for matching DICOM studies
Macro Notes	Allows configuring macro notes
Modality	Allows adding, editing, and reordering modality priority
Modality Room	Allows adding and editing modality rooms
Monthly Goals	Allows creating and editing monthly study count goals by modality for the Monthly Goals operational report
No Show	Allows setting an appointment to a no-show status from the worklist and schedule book

Right	Description
Ordering Facility	Allows adding and editing ordering facilities
Patient Portal Log	Allows viewing Patient Portal activity
POS Map	Allows creating and editing place of service mappings for POS codes, addresses, and mobile dispatching addresses
Provider	Allows adding, editing, and importing resources such as referring providers, reading providers, and technologists
Provider Group	Allows adding and editing groups of providers
Queue	Allows viewing the status of outbound DICOM studies
Rcopia Transactions	Allows viewing Rcopia transactions
Report Template	Allows user to create and edit report headers for approved reports within the Report Template tab
Report Queue	Allows resending and viewing the status of outbound emails and faxes such as approved reports, notifications, scanned documents, and study forms
SR Report Queue	Allows opening the Structured Report Queue tab, which shows the status of outbound DICOM SRs
Transcription Template	Allows adding, editing, deleting, and associating templates with facilities, modalities, and study descriptions used for transcription
Routing Rules	Allows creating routing rules for DICOM studies to send, print, or perform an HL7 action
Schedule Block	Allows adding and editing schedule blocks that display on the schedule book and Find Slots screens
Schedule Filter	Allows adding and editing filters of the schedule book
Schedule Rules	Allows adding and editing individual rules within a schedule template
Schedule Templates	Allows adding and editing scheduling templates
Study Filter	Allows adding, editing, and deleting worklist study filters
Update Global Study Filters	Allows updating global and shared worklist filters
Study Flag	Allows adding and editing study flags
Study Status	Allows adding study statuses and associating them with study flows
Study Status - Read Only	Allows opening the Study Status tab to view study statuses and flows
Templates	Allows adding and editing structured reporting templates
Auto Suggestions	Allows adding and editing auto suggestions for structured reporting
Keywords	Allows adding and editing keywords used for structured reporting
Image Hotspots	Allows navigating through a cardiac US cine series
SR Mapping	Allows adding and editing mappings of DICOM fields to structured reports
Update URLs	Allows adding and updating Rcopia URLs
Users Online	Allows viewing which users are currently logged on, and terminating connections

Right	Description
Vaccines	Allows adding, editing, and marking the inactive vaccines list
Vehicle Log	Allows opening the Vehicle Log tab in Log Setup
Vehicle Registration	Allows adding and managing available vehicles to dispatch in Mobile Rad
Vehicle Tracking	Allows viewing the location of a vehicle
Locked Slots	Allows locking and unlocking slots (scheduling time ranges) for scheduling
Insurance Provider Payer Type	Allows creating and editing payer type groups or categories that can be associated to insurance companies
Provider Level Codes	Allows creating and editing provider level codes and percentages to associate with CPT codes, which are used in the Reading Provider Fees report
Portal Configurations (Read Only)	Allows viewing portal configuration settings.
Portal Configurations	Allows configuring links to appear on the patient, provider, and attorney portals.
NDC Codes	Allows configuring NDCs.
User Management	
AD Groups	Allows adding Active Directory groups
AD Users	Allows adding Active Directory users
User	Allows managing individual user access to the system
User Assigned Patients	Allows viewing the list of patients who are currently assigned to specific users
User Assigned Studies	Allows viewing the list of studies that are currently assigned to specific users
User Group	Allows creating, managing, and assigning document types and user roles to user groups
User Role	Allows creating and managing user rights
Copy Profile Settings	Allows copying profile settings from one user to another
Viewer Options	
External Apps	Allows configuring Exa PACS/RIS to work with external applications
Cardiogram Settings	Allows configuring cardiogram settings in Viewer Settings
External Tools	Allows configuring options in the External Tools tab in Viewer Settings
General Information	Allows configuring options in the General tab of Viewer Settings
Interface Settings	Allows configuring options in the Interface tab of Viewer Settings
Mammography Options	Allows configuring options in the Mammography tab of Viewer Settings
Modality Options	Allows configuring options in the Interface tab of Viewer Settings
Overlay Settings	Allows configuring options in the Overlays tab of Viewer Settings
Tools Settings	Allows configure options in the Tools tab of Viewer Settings

Description of reports

Category	Report	Description
Billing/Reports		
	Aged AR Detail	AR aging by facility, responsible party, and payer by cutoff date and selected facilities, in detail
	Aged AR Summary	AR aging by facility, responsible party, and payer by cutoff date and selected facilities
	Charges	Charges for reconciling and reviewing the charges populated for any date of service
	Claim Activity	Detailed claim activity history by claim date range
	Claim Inquiry	All submitted claims, and order payments and balances
	Claim Transaction	All claims, and claim payments and balances
	Collections	Claims in the Collections Review status
	Credit Balance Encounters	Credit balance encounters
	Diagnosis Count	Aggregate diagnosis count by ICD code and facility, by order date range
	Modality Summary	Modality summary
	Monthly Recap	Monthly recap
	Patient Activity Statement	Patients and study face sheet in form
	Patient Statement	Patient statement
	Patients by Insurance	Patients seen within a date range by insurance
	Payer Mix	Payer mix
	Payments	Totals by payment and payer type, and how each charge line item is applied by accounting date range
	Payments by Insurance Company	Calculated payments to each insurance company, by patient
	Payments Realization Rate Analysis	Accounts with a zero balance
	Procedure Analysis by Insurance	Procedures by insurance
	Procedure Count	Number of procedures approved by radiologist fee schedule
	Reading Provider Fees	Reading provider fees
	Referring Provider Count	Referring provider count
	Referring Provider Summary	Referring doctor summary information
	Transaction Summary	Transaction summary

Category	Report	Description
Reports		Enables all rights in this category
	Audit Trail	Break the glass Audit Trail report
	Completed Schedules	Study details and patient information for completed studies in approved status
	Date of Service Payment Summary	Summary of payments collected for co-pay or time of service
	Export Completed Studies	CSV export of patient, study, and insurance details for completed or approved studies
	Export Peer Review	Progress and results of peer reviews performed
	Fees by Facility and Modality	Summary and breakdown of fees for a modality, by facility
	Fees by Radiologist and Modality	Summary and breakdown of fees for a modality, by radiologist
	Insurance Balance Aging	No longer available
	Insurance vs LOP	Aggregate study count by modality for insurance paid vs letter of protection/personal injury studies
	Marketing Rep Activities	Notes and activities that marketing representatives enter about referring physicians
	Marketing Rep Export	Study information, bill fees, and allowed amounts for referring physicians and marketing reps
	Modality Breakdown	Number of studies performed based on CPT or appointment type, by modality
	Monthly/Daily Study Goals	Number of studies performed in the month compared to the goal set in Monthly Goals Setup
	My Reports	Allows opening the My Reports tab to view operational reports
	Patients Worksheet	Patient and study face sheets in form
	Peer Review Operational	Progress and results of peer reviews performed
	Referrals Variance	Number of studies referred by referring physicians in the past 13 months, by facility, modality, and month
	Referring Physician Study Count	Number of studies referred by referring physicians by date range

Category	Report	Description
	Relative Value Units	CPT and RVU totals for reports signed off, by date range
	Report Filter	Allows opening the Daily Schedules report
	Report Filter	Allows applying filters to reports to create custom reports
	Report Provider	Number of studies tied to insurance VS LOP (Letter of Protection)
	Scheduler Activity	Number of orders (based on the current order status) by time of day that a user ordered, scheduled, rescheduled, or cancelled, by facility and date range
	STAT Tracking	Number of studies marked as STAT
	Studies Breakdown	Number of studies by facility, modality, study date, and study status
	Studies by Modality	Aggregate study count by facility, modality, study date, and study status
	Studies by Modality Room	Aggregate study count by facility and modality room
	Technologist Productivity	Number of studies performed per technologist by facility, modality, appointment type, and procedure code
	Transcription Study Count	Aggregate study count of reports transcribed by transcriptionists, by facility, modality, and study date
	Turnaround Time (TAT) - Calculated	Shows turnaround time (TAT) calculated based on selected date, type, and study's approved date, by date range, facilities, and/or ordering facilities
	Unfinished Studies	Studies *not* having selected study statuses, by facility and date range
	Unsigned Orders	Orders *not* signed by referring physician. No longer used.

Settings in the claim entry screen

The following table describes the settings shown in the Claim Creation screen.

Sub-Tab	Setting	Description
Charges	Date	Claim entry date, automatically assigned.
	Accession No.	Study accession number, automatically assigned.
	CPT Description	Type-to-search or select by CPT code.
	P1···P4	Diagnosis pointers link the diagnosis code to a CPT. Type the first diagnosis pointer in P1, and then add additional pointers as necessary.
	M1···M4	A modifier acts as a shortcut for making a pre-defined change to a claim. Type the first modifier in M1, and

Sub-Tab	Setting	Description
		then add additional modifiers as necessary. See also "Configure modifiers."
	Units	Type the number of procedures of the selected CPT that were performed.
	Bill Fee	The pre-configured charge for the procedure. Edit as needed.
	Total Bill Fee	The bill fee multiplied by the units.
	Allowed	The amount per-unit allowed by the insurance provider as configured in the *billing fee schedule*.
	Total Allowed	The total amount allowed by the insurance provider as configured in the *allowed fee schedule*.
	Auth No.	Type the authorization number provided by the insurance provider.
	Exclude	Select to exclude the charge from an invoice.
Claims	Claim Date	Claim entry date, automatically assigned.
	Facility Name	Select the name of the facility for scheduling purposes. It may or may not be the same as the service facility.
	Billing Provider	Select the provider issuing the invoice for the procedure.
	Rendering Provider	Select the provider who performed the procedure.
	Referring Provider	Select the referring provider.
	Service Facility Location	Select the facility where the procedure was performed.
	POS Type	Select the place of service code for the service facility.
	Diagnosis Codes	Select and add all relevant ICD diagnosis codes.
Insurance (Primary, Secondary, and Tertiary)	Existing Insurance	Select a previously configured insurance profile, if any.
	Carrier	Select the insurance carrier. The carrier's address and other information is filled in automatically.
	Policy No.	Type the insurance policy number.
	Group No.	Type the insurance group number.
	Coverage Start/End Date	Type the start and end dates of coverage, from the patient's insurance profile.
	Relationship	Select the relationship of the patient to the policy holder.

Sub-Tab	Setting	Description
	Subscriber Name	Type the name of the policy holder.
	DOB	Select the date of birth of the policy holder.
	Gender	Select the gender of the policy holder.
	Address…	Type or select the address, city, state, and postal code of the policy holder.
	Service Type	Select the service type to which the procedure belongs. See "Configure procedure codes."
	Benefit On Date	Select the date for which you want to verify eligibility. The default value is the current date.
	Check Eligibility	Click to check eligibility. See also "Verify eligibility of pre-orders and studies with PokitDok."
Additional Info	Patient's Condition Is Related To:	Select a source of the condition if relevant for insurance purposes.
	Accident State	If you select a source above, type the state/province in which the accident (source) occurred.
	Date of illness Onset, Injury/Accident, or Pregnancy (LMP)	Select the date of onset, accident, or first symptoms. In the Other Date box, enter additional dates related to the accident or injury, if needed.
	Dates Patient Unable to Work at Current Occupation	Select a date range in the From Date and To Date boxes.
	Hospitalization Patient Related to Current Services	Select a date range in which the patient was hospitalized, if relevant.
	Claim Notes	Enter notes for the claim. How different from Billing notes.
	Outside Lab	Select if entering a claim for a lab external to the current facility.
	Original Ref	The original reference number returned by Medicaid or Medicare if they are the primary payer. This number can be submitted to a secondary payer.
	Claim Authorization No.	Type the claim authorization number.
	Frequency	If you must submit a corrected claim to the insurance provider, use this field to code it as such.
Billing Summary	[Amounts]	Totals for fees charged, payments made, adjustments, claim balance, allowed amounts, other payments, and refunds.

Sub-Tab	Setting	Description
	Claim Status	Select a claim status. You can use the status selected here for sorting in the Claims screen.
	Billing Notes	Type notes to appear in the Notes column of the Claims screen. This is different from Claim notes, which are submitted with the claim.
	Billing Codes	Select a pre-configured billing code to flag claims for your own specific purposes. See "Add codes and other basic data."
	Billing Class	Select a pre-configured billing class to flag claims for your own specific purposes. See "Add codes and other basic data."
	Responsible	Select the party responsible for payment.
Payments	Accounting Date	The entry date of the payment, assigned automatically.
	Payer Name	Select the payer.
	Pymt. Mode	Select the type of payment.
	Check/Card No.	If the payment mode is "Check," type the check number.
	Apply	Click to apply the payment to the current claim.
	This Pay.	A reference value. Click the Apply button to enter payment information.
	This Adj.	A reference value. Click the Apply button to enter an adjustment amount.
	Payment ID	Automatically assigned serial number for the payment.
	NEW PAYMENT	Click to add a new payment.

Measurement accuracy limits

Measurement	Tools	Unit	Accuracy
Length	Ruler	mm	±2 mm
Angle	Protractor	°	±2°
Area	Calculated	cm^2	±5%
Ratio	Calculated		±2%

Viewer toolbar tools

The following table lists all toolbar tools that are available in the viewer. See corresponding topics for the functions of the tools.

Tool	Name	Function
	2D volume	Calculates the area, length and volume of the selected area.
	3D ray	Draws a 3D ray on an image. Click to place a vertex on one plane, and the ray extends through the image on all planes.
	3D cursor	Displays a cursor in other open planes that follows the motion of the cursor in the active plane.
	AR	Plots points to represent angular rotation.
	Actual image size	Displays images in their real-life anatomical dimensions.
	Angle marker	Measures and annotates an angle.
	Arrow	Draws an arrow.
	Auto W/L	Automatically optimizes the W/L.
	Bone enhance	Controls contrast between bone and other tissues.
	Change slice thickness	Sets the slice thickness.
	Circle	Draws a circle.
	CLAHE	Contrast limited adaptive histogram equalization. Turns CLAHE mode on/off. Improves image contrast.
	Cobb angle	Measures a Cobb angle.
	Context menu	Displays the view shortcut.
	Context tool	Displays a linked image at the same X, Y, Z angle as the current image.
	Cutlines	Shows/hides cutlines, if present.
	Default	Selects the standard pointer tool.
	Delete all image annotations	Deletes all annotations.

Tool	Name	Function
	DICOM values	Display a list of DICOM values associated with the current image.
	DM settings	Display management.
	Dot	Draws a dot.
	Edit	Turns Edit mode on/off. Edit mode allows editing of previously set annotations.
	Ellipse	Draws an ellipse.
	External tools	Reserved for starting an external application.
	Fit to window	Restores original zoom level.
	Flip horizontal	Flips the image across its vertical axis.
	Frames	Selects the number and arrangement of frames to display in the viewing area.
	Free ROI	Freehand-draws an ROI.
	HO angle	Draws a HO angle.
	Horizontal line	Draws a horizontal line.
	HU	Displays the pixel value in Hounsfield Units.
	Invert color	Inverts black/white values.
	L symbol	Adds an L (left) marker.
	Line	Draws a straight line.
	Link auto	Links two or more series that are open.
	Link manual	Links user-specified frames between panels.
	M compare	Measurement compare. Displays the distances from one point to one or more other points.
	Magnifying glass	Displays a movable zoomed area.
	Measure	Measures between two specified points.

Tool	Name	Function
MPR ▼	MPR	Multiplanar reformation. Click to generate and display coronal, sagittal, and MIP (maximum intensity projection) stacks from an axial image.
1:1	One to one	Displays the image in its original DICOM size.
👁	Overlay	Turns overlays on/off.
✋	Pan	Drags the image any direction.
D	Patient documents	Opens an independent window for viewing, scanning in, and attaching patient documents. Turns blue when documents are available.
✏	Pencil	Freehand-draws a line.
🎞	Play frames	Starts cine looping.
🖨	Print images	Sends images to a non-DICOM printer.
R	Prior reports	View reports. Turns blue when reports are available.
®	R symbol	Adds an R (right) marker.
➕	Radial angle	Draws a radial angle, which is the angle of the distal radial surface with respect to a line perpendicular to the shaft.
➕	Radial length	Draws a radial length.
▣	Rectangle	Draws a rectangle.
C	Reset frame	Undoes all unsaved changes to the image within the active viewing cell.
🗙	Reset linked series	Removes any linkages.
⎙	Reset stack	Restore images in a stack to their last-saved ordering.
↰	Reset viewer	Reverts non-permanent modifications to images in the viewer (zoom, rotation, Window/Level etc.) to their original state.
ROI	ROI	Draws an ellipse to specify an ROI.
↻	Rotate right	Rotates the image 90 degrees clockwise. Point to the rotate button to reveal the rotate left button.

| Tool	Name	Function
↺	Rotate left	Rotates the image 90 degrees counterclockwise. Point to the rotate button to reveal the rotate left button.
⬆	Save annotations	Saves the current state of annotations.
▥	Scroll/span images	Switches between scrolling and spanning.
⚙	Settings	Displays the settings dialog box.
P	Show prior list	Opens a dialog box with a list of priors that you can select to display in the prior bar.
▣	Shutter	Adds an image shutter.
▥	Span Images	Scrolls at an accelerated rate.
⟋	Spine label	Adds vertebrae labels to spinal images.
⟋	Spine label short	Adds vertebrae labels from common starting points.
⟋	Spine label 3D short	Adds 3D vertebrae labels from common starting points.
⟋	Spine label quick 3D	
⟋	Spine label 3D	Adds 3D vertebrae labels.
N	Study notes	Displays a dialog box for reading/writing notes.
T	Text	Draws text.
T	Transcription	Opens an independent dictation and transcription window.
▌	Vertical line	Draws a vertical line.
☀	Window/level	Adjusts the window/level.
Q	Zoom	Zooms the image in/out.

Install and configure tools

Add the Chrome extension

You can add an extension that enables your Chrome browser to work with multiple monitors. After adding the extension, you can configure display settings for the monitors you will use.

1. On the burger ☰ menu, on the **TOOLS** submenu, click **CHROME EXTENSION**.

2. On the **Chrome_MultiMonitor** page, click **Add to Chrome**.
   Note: If the **'Add Chrome_Multimonitor?** message appears, click **Add extension**.
3. On the worklist, on the upper toolbar, click the settings ⚙ button, and then in the button shortcut menu, click **Viewer Settings**.

Monitors on System	3	↻ 👁
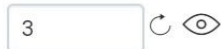
4. On the **GENERAL** tab, under **Display Settings:**
5. Click inside of the **Monitors on System** box
6. Click the refresh ↻ button
7. Click the identify 👁 button.
8. In the table of monitors:
   a. In the **Monitor** column, select all monitors that you want to use.
   b. In the **Current** column, select the monitor to hang current images and thumbnails.
   c. In the **Prior** column, select the monitor to hang prior images and thumbnails.
   Note: When using a hanging protocol, the Current and Prior settings in the table only control where the thumbnails hang.
9. Optional. In the **Orders** column, select an item to auto-open in the monitor.
10. Click **SAVE**.

Install Exa Trans

Radiologists who use Dragon for transcription must install Exa Trans.
Prerequisite: If using Windows 7, update the .NET framework to version 4.6.2 or later.

1. On the burger ☰ menu, on the **TOOLS** submenu, click **EXA TRANS**.
   Note: Chrome downloads ExaTransSetup.msi in the lower left corner of the browser. Wait until the download is finished before continuing.
2. Click **ExaTransSetup.msi**. Windows installs Exa Trans.
   Note: If the Windows protected your PC dialog box appears, click **More info**, and then click **Run anyway**.

Install Exa Dictation

Radiologists who use Dragon for dictation must install Exa Dictation.

1. On the burger ☰ menu, on the **TOOLS** submenu, click **EXA DICTATION**.
   Note: Chrome downloads exa_dictation_setup.msi in the lower left corner of the browser. Wait until the download is finished before continuing.
2. Click **exa_dictation_setup.msi**.
3. Windows installs Exa Dictation.
   Note: If the Windows protected your PC dialog box appears, click **More info**, and then click **Run anyway**.

Install OPAL tools

Many functions in Exa PACS/RIS require that you first install OPAL tools, such as CD import and CD burning.

1. On the burger ☰ menu, on the **TOOLS** submenu, click **OPAL TOOLS**.
   Note: Chrome downloads OpalToolsSETUP.exe in the lower left corner of the browser. Wait until the download is finished before continuing.
2. Click **OpalToolsSETUP.exe**. Windows installs Opal tools.
   Note: If the **User Account Control** dialog box appears, click **Yes**.

Install OPAL Viewer

Exa PACS/RIS uses a server-side viewer, but you can also install the client-side Opal viewer.

1. On the burger ▤ menu, on the **TOOLS** submenu, click **OPAL VIEWER**.
   Note: Chrome downloads ExaClientViewerSETUP.exe in the lower left corner of the browser. Wait until the download is finished before continuing.
2. Click **ExaClientViewerSETUP.exe**. Windows installs the Opal viewer.
   Note: If the **Windows protected your PC** dialog box appears, click **More info**, and then click **Run anyway**.

Install Exa Scans

Exa Scans enables you to scan paper and other media and attach the scans to studies as DICOM data.
Prerequisites: You must uninstall any existing version of Exa Scans before installing a new one.
If using Windows 7, update the .NET framework to version 4.6.2 or later.

1. On the burger ▤ menu, on the **TOOLS** submenu, click **EXA SCANS**.
   Chrome downloads exa_docscan_setup.msi in the lower left corner of the browser. Wait until the download is complete before continuing.
2. Click **exa_docscan_setup.msi**.
   Note: If the Windows protected your PC dialog box appears, click **More info**, and then click **Run anyway**.
3. In the **Welcome to the EXA Document Scan Setup Wizard**, click **Next**.
4. On the **End User License Agreement** page, select **I accept the terms in the License Agreement** check box, and then click **Next**.
5. On the **Destination Folder** page, click **Next**.
6. On the **Ready to Install EXA Document Scan** page, click **Install**.
7. If the **User Account Control** dialog box appears, click **Yes**.
8. On the **Completed the EXA Document Scan Setup Wizard** page, click **Finish**.

Install Exa Launch

Exa Launch is a background application that prepares studies to be opened by third-party applications such as PenRad, PowerScribe 360, and MModal.

1. On the burger ▤ menu, on the **TOOLS** submenu, click **EXA LAUNCH**.
   Chrome downloads ExaLaunchExtApp.msi in the lower left corner of the browser.
2. Wait until the download is complete, and then click **ExaLaunchExaApp.msi**.
3. If the UAC prompt appears, click **YES**.

Install Exa Tool

Exa Tool is a client side background application that enables opening studies in OrthoView.
Prerequisite: Install local cache (see "Install local cache").

1. On the burger ▤ menu, on the **TOOLS** submenu, click **EXA TOOL**.
2. Wait until the download is complete, and then run **exa_tool_setup.msi**.
3. Follow the on-screen prompts.

Install local cache

Local cache is a service that manages the copying of studies from the server to your local workstation for local use.

Configure the server

1. On the burger ▤ menu, click **SETUP**.
2. Next to the burger button, click the word in all caps, and then click **DICOM.**

3. On the **AE Title** tab, click **Add**, and then enter the following settings.
   AE Type   Local Cache
   AE Title (Remote)   [Name with no spaces]
   Description   [Friendly descriptive name]
4. Click **SAVE**.

Configure the client

1. On the burger ☰ menu, on the **TOOLS** submenu, click **CLIENT SERVICE**.
   Result: Your browser downloads **exa_localcache_setup.msi** to its specified folder for downloads (usually the Windows Downloads folder).
2. Run **exa_localcache_setup.msi** and follow the prompts to install it.
3. In the Exa PACS/RIS worklist, click **Settings** ⚙ and select **Local Service Settings**.
4. In the **Rendering Options** screen, under **Prefetch Config**, enter the following settings.

Target	Shortcut
AE Title	Type the AE Title (Remote) name that you created in "Configure the server" above.
Username	Type a user name with permission to access studies on the server.
API URL	Type the address of the server hosting the studies that you want to locally cache.
Auto Update	Select to check for new versions of the Local Cache software.
Debug Mode	Select to add additional troubleshooting information to logs.
Disable oncall	Leave cleared.

5. In the **Rendering Options** screen, under **General Config**, enter the following settings

Target	Shortcut
API Timeout	Type the number of seconds to keep the connection to the server open.
Study Timeout	Type the number of hours to keep the imageservice/study thread open.
Prefetch Interval	Type the number of minutes keep to studies in the send queue.
Cache Timeout	Type the number of days to keep locally cached studies before purging.
Cache Directory	Type the fully qualified path to the local cache (default = c:\viztek\exa\cache\localcache)
Studies Count	Type the maximum number of studies to keep in local cache.
RAM Usage	Type the maximum number of megabytes of RAM to use for prefetching and local rendering.
Max Threads	Type the number of simultaneous threads available to download studies.
Parallel Prefetch	Leave blank.
CPU Usage	Type the maximum percentage of the CPU to use for prefetching and local rendering.

Target	Shortcut
Oncall Interval	Type the number of minutes to elapse before checking for new studies to prefetch.

6. Click **ACTIVATE**.

Add a trusted IP or URL

If access to an external server is needed to access to third-party apps, add the IP address or URL of the external server to a list of trusted resources as follows.

1. On the Exa PACS/RIS server, use File Explorer to navigate to the **...web\config** directory.
2. In **Notepad**, open the **express.js** file.
3. In the **app.use(helmet.contentSecurityPolicy({** area, under **scriptSrc**, add the IP or URL as in the example in the image below.

```
scriptSrc: [
    "'self'",
    "'unsafe-inline'",
    "'unsafe-eval'",
    "https://exalocal.viztek.net:33356",
    "https://exalocal.viztek.net:33355",
    "https://maps.googleapis.com",
    "https://exarecord.viztek.net:8422",
    "https://www.google.com/",
    (req, res) => `nonce-${res.locals.cspNonce}'`
]
}
```

4. In **Control Panel**, click **Administrative Tools**, and then double-click **Services**.
5. In the list of services, select **exa_web**.
6. Use the toolbar to **stop**, and then **start** the service.