Exa® PACS/RIS

1.4.32_P1

User's Manual, Alberta

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

500-000449A

Table of Contents

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 15223-1:2021	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 15223-1:2021	5.1.2
	Date of Manufacture	Indicates the date when the device was manufactured.	ISO 15223-1:2021	5.1.3
	Caution	Indicates information that is important for preventing loss of data or misuse of the software.	ISO 15223-1:2021	5.4.4
LOT	Batch Code	Indicates the full Software Release / Version number	ISO 15233-1:2021	5.1.5
SN	Serial number	Indicates the manufacturer's serial number so that a specific medical device can be identified	ISO 15233-1:2021	5.1.7
REF	Catalogue Number	Indicates the manufacturer's catalogue number so that the device can be identified	ISO 15233-1:2021	5.1.6
	Consult instructions for use	Indicates the need for the user to consult the instructions for use	ISO 15233-1:2021	5.4.3
℞ 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

BS EN ISO 15223-1:2021 Medical devices - Symbols to be used with information to be supplied by the manufacturer - 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

Konica Minolta Healthcare Americas, Inc.

2217 U.S. Highway 70 East

Garner, NC 27529 USA

Tel: 1-800-366-5343

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, 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.

Help us improve!

If you find any errors in this manual, would like us to explain something better, or would like us to cover a new topic, please let us know by visiting our online portal.

https://support.kmhapub.com/PremierCustomer/Home.aspx
Monitored: 8:00 AM–8:00 PM EST

For urgent issues, please call the Hotline.

New in version 1.4.32_P1

The following is a partial list of new or updated major features in version 1.4.32_P1. For more information, see the release notes.

- The Exa PACS/RIS viewer can now be opened by using an encrypted URL from an EMR or other external source.
- Users can now add and delete settings for encrypting study URLs, and can generate corresponding encryption keys.
- Users can now set a span sensitivity of Default, which was the "0/Auto" sensitivity used in version 1.4.29.

Getting started

Configure your working environment

Internal and external setup

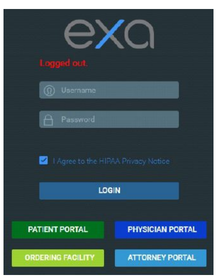
Configure the language in Chrome

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

1. In Chrome, select the customize ⋮ button, and then select **Settings**.
2. On the left pane, select **Languages**.
3. If the local language and culture does not appear in the list, select **Add languages**, and then add the language.
   Note: The culture must be correct. For example, in Canada, ensure that English (Canada) is installed.
4. Select the more actions ⋮ button for the local language, and then select the **Display Google Chrome in this language** checkbox.
5. Select the more actions ⋮ button again, and then select **Move to Top**.
6. Select **Relaunch**.

Sign in to the Exa platform

You can sign in to the main application, the patient portal, the physicians' portal, the ordering facility portal, or the attorney portal.



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** checkbox.
4. Do one of the following:
   - To sign in to Exa PACS/RIS, select **LOGIN**.
   - To sign in to a portal, select a portal button.

See also:
About two-factor authentication
Sign in using 2FA with email
Sign in using 2FA with Google Authenticator

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 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 also:
Create a user
Edit your user profile
Sign in using 2FA with email
Sign in using 2FA with Google Authenticator

Sign in using 2FA with email

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

1. Sign in to Exa PACS/RIS in the usual manner.
2. In the **EMAIL VERIFICATION PENDING** box, paste the verification code and select **VERIFY**. Exa PACS/RIS signs you out.
3. Sign back in to Exa PACS/RIS, select **REQUEST TOKEN**, type the token sent to the email address, and then select **LOGIN**.
   Note: Every time you sign in in the future, you must repeat this step, using a different token each time.

See also:
Sign in to the Exa platform
About two-factor authentication
Sign in using 2FA with Google Authenticator

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, select the blue Konica-Minolta globe.
3. In the **My Profile** dialog, in the **Two Factor Authentication** box, type your sign-in password, and and then select the **Enter** key.
4. Select **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 select **VERIFY**.

See also:
About two-factor authentication
Sign in using 2FA with email

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. Select the burger button.
2. At the top of the burger menu, select the blue Konica Minolta globe:

or  (user avatar).

3. In the **My Profile** dialog, select **CHANGE PASSWORD**.
   Enter current and new passwords, and then select
   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, select the blue Konica Minolta globe.
2. In the **My Profile** dialog, select **Choose File**.
3. Browse for and select your avatar image, and then select **Open**.
4. Select **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. Select the burger button.
2. At the top of the burger menu, select the blue Konica Minolta globe or user's avatar:

   or  (user avatar).

3. In the **My Profile** dialog, 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 dropdown 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.

Setting	Description
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. Select **SAVE**.

View version information

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

1. Select the burger button.
2. At the bottom of the burger menu, select 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**.
   - Select **Change Icon**, and then browse for and select an icon.
   - Select **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.

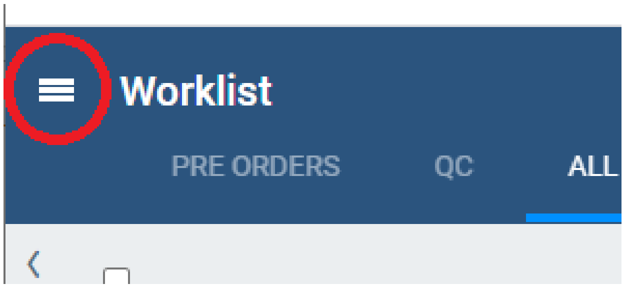
1. Open an image in the viewer.
2. Optional: For higher accuracy, on the image shortcut menu, select **View** > **Actual Image Size**.
3. Hover over the upper-right corner of a frame, right-click, and then select **Recalibrate**.

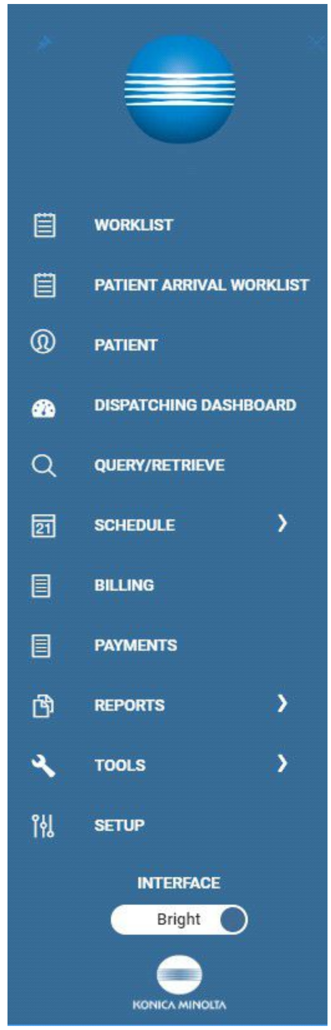
4. Select two points on the image.
5. In the **Dialog** dialog, type the length between the points and then select **OK**.
   Note: If prompted to apply calibration to the series, select **OK**.
   Results
   - The calipers are modified.
   - Previously annotated measurements are redrawn.
   - Future measurements will appear according to the new calibration values.

See also:
Set up connected displays

Work with the hamburger menu

The hamburger (burger) menu is the main menu of the program. To open it, select the burger menu button circled in red in the following figure. Some of the options in the figure may not be available depending on your product and configuration.





The burger menu button...

...and menu (your options may vary)

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 companies

Company here means the parent hospital, clinic, or other institution where Exa PACS/RIS is installed. After configuring your company you can configure its child facilities (see Add a facility) and other locations as needed. In configuring your company you enter basic settings such as its name and address, but also —depending on product and configuration—you can customize Exa PACS/RIS for your company's needs by adding preset options for such things as: sex, body parts, and ethnicity; patient alerts, critical findings, cancellation reasons; MRN and accession number formatting; passwords; and billing modifiers.

Configure your company

To configure your company:

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **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 tab. Enter settings in the tab, and then select **SAVE CONFIG**.
Enable Payment Gateway	Select to turn on the Payment Gateway service, if available, and display the PAYMENT GATEWAY tab. Enter settings in the tab, and then select **SAVE.**
Trigger Routing on Study Flag Changed	Select to reprocess routing (DICOM transactions) automatically when a user changes a study flag.

4. Select **SAVE**.
5. Enter additional information as needed by following the steps in later subsections.
   Note: When finished, select **SAVE** again at the top of the screen on the right side of the **Trigger Routing on Study Flag Changed** checkbox.

Configure general settings

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **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.
	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.
	EDI Submitter ID	[Not used in Alberta]
	EDI Receiver ID	[Not used in Alberta]
	Modifiers in Order	Forces the user to enter modifiers before creating an order.
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.
Patient Portal	[checkboxes]	Select which demographics to display in the patient portal.
Peer Review	Schedule (how often studies are assigned to be peer-reviewed)	Select the frequency of assignment.
	Cron custom settings	Available when you select Custom settings in the Schedule dropdown list. Type a custom frequency for assigning peer reviews.
	Peer Review Percentage of yearly approvals	Type the percentage of studies to be assigned annually for peer review.

Setting	Description	
	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. Select **SAVE ALL INFO**.

Configure settings

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

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **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 following table.
4. At the bottom of the screen, in the **Description** box, type a setting, and then select **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.
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	Type a gauge to use, and then select SAVE.

Configure app settings

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

1. On the burger ☰ menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **COMPANY** tab, select the **APP SETTINGS** sub-tab.
4. In the list on the left side of the screen, select one of the settings in the following table.
5. At the bottom of the screen, in the **Description** box, type a setting and select **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. Select 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 Type	Descriptions such as Skilled Nursing Facility, Assisted Living, and Hospice.

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **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** checkbox to require the technologist to select a reason.
5. In the dialog, select **ADD**, type a reason code, and select the save button.
6. Select anywhere outside of the dialog to close it.

Configure the MRN formatting

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

Setting	Description
MRN Type	Select Default to use the default formatting included with Exa PACS/RIS, or Custom to define your own formatting.
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 formatting

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **COMPANY** tab, on the **ACCESSION INFORMATION** sub-tab, enter the following settings and then select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **COMPANY** tab, on the **AE FILTER** sub-tab, in each box, type an item and then select the plus button.

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

Configure HL7 filters

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

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

Configure password options

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

<table>
<tr><th>Setting</th><th colspan="2">Description</th></tr>
<tr><td>Password Must Be between…</td><td colspan="2">Type a minimum and maximum number of characters that passwords can contain.</td></tr>
<tr><td rowspan="4">Passwords Must Contain …</td><td>Uppercase Letters</td><td rowspan="4">Exa PACS/RIS validates passwords based on these selections.</td></tr>
<tr><td>Lowercase Letters</td></tr>
<tr><td>Numbers</td></tr>
<tr><td>Symbols or Special Characters</td></tr>
<tr><td>‘User Must Change Password Next Login’ Is Checked by Default</td><td colspan="2">Select or clear to assign the default state of the setting.</td></tr>
<tr><td>Force Users to Reset Their Password on a Set Schedule</td><td colspan="2">Select to require password resets of a specified interval.</td></tr>
<tr><td>Apply Password Requirements to Patient Portal</td><td colspan="2">Select to use the same password requirements for Patient Portal accounts.</td></tr>
</table>

Configure link encryption

You can define how Exa PACS/RIS responds when a user clicks a link to a study using an encrypted URL. Settings here must match those agreed upon by the entity creating the encrypted links. You cannot edit link encryption settings, only add and delete them.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **COMPANY** tab, on the **LINK ENCRYPTION** sub-tab, select **ADD**.
4. Enter the following settings.

Setting	Description
Link Encryption Type	Select the screen in which to open the study.
Integration Name	Type the friendly name of the integration (matching the one included in the URL, which identifies the decrypting pre-shared key and action to take on the decrypted URL).
Link Expiry	Select the checkbox to apply an expiration to the URL, and then use the dropdown list and text box to configure a length of time before expiration.
Key Type	Select a type of encryption for the key.
Key Expiry	Select the checkbox to apply an expiration to the key, and then use the date picker to select an expiration date.

5. Select **GENERATE**.
6. In the dialog, copy the passphrase and initialization text to a safe location, and then close the dialog.
   CAUTION: Do not close the dialog until you copy the information; Exa PACS/RIS will never display it again. If you lose the key, you must create a new one.
7. Send the passphrase and initialization text to the EMR company or other entity creating encrypted links.

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **MARKET** tab, select **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. Select **SAVE**.

Add a facility

Facilities are typically where healthcare services are rendered. You must add at least one facility to your company. You must add at least one facility to your company.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **FACILITY** tab, select **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.
Facility Number	Type the Alberta Health facility number.
Business Arrangement Number	Type the Alberta Health business arrangement number of the facility.
Functional Centre	Type the Alberta Health functional centre code.
Functional Centre Required on Claim	Type the Alberta Health functional centre code that is required on claims.
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 previously.
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]

Setting	Description
Alberta WDFA	Type the WDFA number for Netcare.
Updox Account ID	Type your ID for signing in to Updox.
Send fax via Updox	Select to use Updox to send faxes.
Upload Logo	Select **Choose File**, browse for and select a logo for the facility, and then select **Open**. Logos can be in JPEG or PNG format.
Remove Logo	To remove the current logo, select 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.
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 when: 1) scheduling a pre-order; and 2) double-selecting 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 timeslot 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 formatting for payment receipts.
Custom Receipt	Select to use a custom receipt for payments, such as co-pays.
Exclude from All Portals (All Portals & Break the Glass)	Select to exclude studies associated with the facility from portals and the Break the Glass functions.
Required Fields at Scheduling	Select one or more options to require.
Required Fields for Creating a Preorder	Select one or more options to require.

Setting	Description
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	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 notes specific to the current facility.
MRN Information: Inherit	Select to copy the MRN from the EMR of origin.
Other MRN settings	See “Configure the MRN formatting” in Configure your company.
The following settings become available after you save.	
Group Number	Type the group number of the facility.
Enable Insurance Eligibility	Enables verification of insurance eligibility.
Enable Insurance Claims	Enables claims at the facility.
Master Number	Type the master number of the facility.
Prof Group Number	Type the professional group number of the facility.
Default Billing Provider	[Fixed value].
Service Facility	[Not used in Alberta]
POS/SLI	[Not used in Alberta]
Prof. SLI	The SLI code used for professional fees in Ontario.
Fee Schedule	Select the fee schedule for the facility.
Rendering Provider	The primary radiologist at the facility.

5. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **MODALITY** tab, select **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. Select **SAVE**.
6. In the list of modalities, select 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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **MODALITY ROOM** tab, select **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	Select 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. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **CHAT GROUP ROOMS** tab, select **ADD**.

Setting	Description
Room Name	Type a name for the room.
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.

4. Select **SAVE**.

Add a notification

You can pre-configure notifications to appear on the dashboard and/or portal sign-in pages under "Organizational News." These notifications are fixed messages, and not related to email or fax notifications.

Prerequisite: Add at least one facility.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **NOTIFICATION** tab, select **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. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **TASKS** tab, select **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. Select **SAVE.**

What are authorization, verification, and estimation?

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. *Estimation* refers to estimating coverage in the form of amounts payable by insurance companies, patients, and other parties.

Eligibility verification and insurance coverage estimation is performed electronically with a clearinghouse through PokitDok, ImagineSoftware, or other service. If the verification service is not able to determine eligibility, it can be determined manually 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.
Prerequisite: Configure at least one procedure code and insurance provider.

1. Optional. To filter the list of rules, in the **Facility** dropdown list, select a facility.
2. On the burger menu, select **SETUP**.
3. Next to the burger button, select the word in all caps, and then select **Office**.
4. On the **EXAM AUTHORIZATION** tab, select **ADD.**
5. In the **Add Authorization Rule** dialog, 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 dropdown 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.
Service Codes	Select NONE SELECTED, and then use the search bar to find and select one or more procedure codes. The authorization rule only

Setting	Description
	applies to the procedures you select.
Insurance Providers	Select 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. Select **SAVE.**

See also:
[What are authorization, verification, and estimation?]
[Manually authorize an exam]
[Manually unauthorize an exam]

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **STUDY FLAG** tab, select **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.
View Study Flag on Schedule Book	Select to show any study flags added to a study on the appointment card in the schedule book.
Color Code	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. Select **SAVE.**

Set monthly goals

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

1. On the burger ☰ menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **MONTHLY GOALS** tab, select **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. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **MACRO NOTES** tab, select **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.
Edit Appointment Types	Select to add or remove the appointment types for which the macro note is available.
Macro Text	Type the text of the macro note.

5. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **PORTALS** tab, select 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. Select **SAVE**.

Manage life cycles

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

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **LIFE CYCLE MANAGEMENT** tab, select **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 checkbox, and then specify the number and category of days.
	Age of Patient: Select the checkbox, and then specify the age of the patient.
	Verify image instance before removing: Select the checkbox, and then specify the databases from which to purge the images.

5. Select **SAVE**.

Configure all LDAP settings

Exa PACS/RIS supports the LDAP and LDAPS (LDAP Secure) protocols.

Make LDAP available

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **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, select **CHECK CONNECTION**.
8. Optional: To synchronize servers manually, select **SYNCHRONIZE**.
9. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. On the **AD GROUPS** tab, select **SYNC. AD GROUPS**.
4. In the left pane, select the groups that you want to synchronize (add to the server).
5. Select **CREATE SELECTED GROUPS**.

Synchronize AD users

To synchronize AD users with the LDAP server:

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. On the **AD USERS** tab, select **SYNC. AD USERS**.
4. In the left pane, select the users that you want to synchronize (add to the server).
5. Select **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, in **Control Panel**, select **System and Security** > **Administrative Tools** > **Active Directory Domains and Trusts**.
2. In the left pane of the **Active Directory Domains and Trusts** dialog, 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 select **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 a 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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Providers & Resources**.
3. On the **ORDERING FACILITY** tab, select **ADD**, and then enter the following information.

Setting	Description
Code	Type your internal facility code.
Facility Number	Type the Alberta Health facility number.
Name	Type the name of the facility.
Market	Select the market served by the facility.
[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 checkboxes 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	Type notes for the ordering 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 allow 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).

Setting	Description
Medicare UPIN	If there is only one healthcare provider at the facility, type the unique physician identification number of the provider.
ULI/HSN	If there is only one healthcare provider at the facility, type the ULI or HSN of the provider, if available.
Contract Start Date	[unused in Alberta]
Fee Schedule	Select a fee schedule from the dropdown list. To add fee schedules, see Configure a fee schedule.
Locations/Contacts	Select the providers associated with the ordering facility.

4. Select **SAVE & CLOSE**.

Locations/Contacts

See Add a location or contact to an ordering facility.

Providers

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

Summary

To generate summaries of patients and studies at the ordering facility, select 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.

- Select **GO** to view the summary report.

Marketing Rep

To configure a marketing rep. for the ordering facility, select 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. Select **SAVE**.
2. In the **Notes**, **Follow-Ups/Tasks**, and **Contracts** areas, select **ADD** to add the corresponding items to the marketing rep.
3. In the **Patient Documents** area, select **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. On the **LOGIN DETAILS** sub-tab, select a user and then select **LINK USER**.
2. Optional. To add a new user, enter credentials and select **CREATE USER**.

Linked Resources

To link technologist or vehicle resources to the ordering facility, select 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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Providers & Resources**.
3. On the **ORDERING FACILITY** tab, select **IMPORT**.
4. Select **Choose File**, browse for and select the file to import, and then select **Open**.
5. Optional. To overwrite existing facilities, select the **Update Existing** checkbox.
6. Select **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, select **Setup**.
2. Next to the burger button, select the word in all caps, and then select **Providers & Resources**.
3. On the **ORDERING FACILITY** tab, select the **LOCATIONS/CONTACTS** sub-tab.
   Note: If new options do not appear, scroll down.
4. Select **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 or SLI for the location.
Primary Contact	Select if this location is the primary contact for the ordering facility.

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

Add a provider organization

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

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

Setting	Description
Code	Type your internal code for the organization.
Description	Type a description.

4. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Providers & Resources**.
3. On the **PROVIDER GROUP / LOCATION** tab, select **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. Select **SAVE**.
5. Use the **PROVIDERS** sub-tab to view or edit the list of configured providers.
6. Use the **SUMMARY** tab to display a list of patients or studies associated with the current provider group.
7. Use the **MARKETING REP** sub-tab to add a marketing rep to the provider group.

Add a resource

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

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

Tab/Sub-tab	Setting	Description
	Title	Type the academic credentials of the provider (e.g. MD)
	Group Number	Type the group number of the provider.
	Dr. Office Name	Type the business name of the provider's office.
	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 list that are associated with the selected market become selected.
	Facilities	Select all facilities with which the provider is associated.
	Skill Code	Select the skills or 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.
	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.
Contact Info/Contact Information	Code	Type your internal code for the provider.
	Provider Organization	Type the organization to which the provider belongs.
	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.
	Contact Name	Type a contact name, such as the name of the administrative assistant of the provider.

Tab/Sub-tab	Setting	Description
	[Address]	Type or select the country or region and address of the provider.
	Service Provider PRID	Type the PRID of the service provider.
	Locum Arrangement	If the resource is a locum, type the locum business arrangement number.
	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 to the individual provider location/contact, 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 provider location/contact's provider group, and select which methods to use.
Report Password	--	If you selected Email Report Link previously, 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/Fax	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. Select **SAVE CONTACT** and then **SAVE & CLOSE**.

See also:
Configure a technologist
Deliver reports

Convert or merge a system provider resource

When Exa PACS/RIS receives a study with providers that it does not recognize, it automatically creates a *system provider* resource and associates the study with that system provider. System providers are not available in other parts of the program, but you can convert them to a usable provider or merge them with an existing one.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Providers & Resources**.
3. On the **RESOURCE** tab, on the **SYSTEM PROVIDER** column, select **Yes**.
4. Select a system provider in the list, and then do one of the following.
   a. To merge with an existing provider, select **USE EXISTING**, select a provider, and then select **SAVE**.
   b. To convert to a useable provider, select **CONVERT DIRECTLY**.
5. Select a system provider in the list, and then do one of the following.

Configure a technologist

Technologists have access to special features in Exa PACS/RIS, and therefore require a slightly more detailed configuration. For example, you can specify which appointment types the technologist is allowed to perform, and assign schedule rules to the technologist, which prevents scheduling them for an appointment that they are not allowed to perform. To configure a technologist:

Add a technologist resource

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

Create a technologist user role

1. On the burger menu, select **Setup**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. On the **USER ROLES** tab, select **ADD**, type a name and description of the role (such as "Technologist"), and the select **SAVE**.
4. In the **User Role Permission** area, select the **Technologist** user right, plus any other rights you want to grant all technologists.
5. Select **SAVE & CLOSE**.

Create a technologist user group

1. On the **USER GROUPS** tab, select **ADD.**
2. In the **Roles** dropdown list, select **Technologist** (or the name of the technologist user role you created earlier).
3. Enter other settings for the group (see Create a user group), and then select **SAVE**.

Create a technologist user

Configure an individual technologist as a technologist user.

1. On the **USERS** tab, select **ADD.**

2. In the **Linked Provider User Type** dropdown list, select **Technologist**.
3. In the **Technologist** dropdown list, select the technologist resource you created earlier.
4. Enter all other settings for the user (see Create a user).
5. Select **SAVE**.

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Providers & Resources**.
3. On the **PROVIDER PAY SCHEDULE** tab, select **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 select 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 select 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 select the plus button. Add all appointment type/fee combinations that the provider offers.

4. Select **SAVE.**

View originating facilities

For reference, you can view a list of originating facilities that are recognized by Alberta.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Providers & Resources**.
3. Select the **ORIGINATING FACILITIES** tab.

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 these steps:
Prerequisites: Configure procedure codes.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **FEE SCHEDULE** tab, select **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 dropdown.

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

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

See also:
About fee schedules

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, select **SETUP**.
2. Next to the burger button, select 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) Select **IMPORT FEE SCHEDULE**.
   b) Select **Choose File**, browse for and select a file to import, and then select **Open**.
   c) Select **IMPORT**.
5. To export the current fee schedule to your Windows Downloads folder, select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **FACILITY FEE SCHEDULE** tab, select **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 select the plus button. You can add multiple modality/fee combinations.

5. Select **SAVE.**

Configure body parts

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

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **BODY PARTS** tab, select **ADD.**
4. Type the name and alternative name for the body part, and then select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **DIAGNOSTIC CODES** tab, select **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. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **DIAGNOSTIC CODES** tab, select **IMPORT**.
4. Select **Choose File**, browse for and select the file to import, and select **Open**.
5. Optional. To overwrite existing facilities, select the **Update Existing** checkbox.
6. Select **IMPORT**.

About health service codes, appointment types, and appointment type procedures

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

An *appointment type* is a separate entry that you associate with a health service code *for purposes of scheduling and medical examinations* (by the front desk, radiologists, and technologists). You work with either a health service 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 health service code.

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

Health Service (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 health service code.

See also:
[Configure health service codes](#)
[Configure appointment types](#)

Configure health service codes

A *health service code* is an internal code that identifies a medical service. Additionally, health service code entries are detailed sets of information about procedures that Exa PACS/RIS uses for billing, ordering, and other functions. When you configure a health service 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.

Prerequisite: For adding NDCs to a health service code, complete the steps in "Configure NDCs."

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **HEALTH SERVICE CODES** tab, select **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.
Ref. Code	Type the reference code of the procedure. In most cases this can be the CPT or LOINC code.
NDC Code	[Not used in Alberta]
NDC Measure	[Not used in Alberta]
Color Code	Select in the box, and then select a color in the picker to assign to the procedure.
SDE Study	Select the checkbox if the procedure is associated with echo ultrasound.

5. Select **SAVE**.
6. Optional. On the **GENERAL** sub tab, enter the settings in each of the following tabs, and then select **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.

Setting	Description
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, select **Add**.
   b. Search for a code by entering criteria in the search boxes at the top and pressing **Enter**.
   c. Select the checkboxes of the NDCs to add, and then select **ADD**.
8. Optional. For **EXAM PREP. INSTRUCTIONS**, see Configure exam prep instructions.
9. Optional. To specify a report template to be used for the procedure, on the **DEFAULT REPORT TEMPLATE** sub-tab, do one of the following.
   - Under **Template List**, select an existing template.
   - Select **NEW TEMPLATE**, type a template name, create a template in the word processing area, and then select **SAVE TEMPLATE**.
10. Select **SAVE & CLOSE**.

See also:
About health service codes, appointment types, and appointment type procedures

Import specimen catalogs

If you obtain specimen catalogs in CSV format, you can import them.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **PROCEDURE CODES** tab, select **SPECIMEN CATALOG**.
4. Select **Choose File**, browse for and select the file to import, and select **Open**.
5. Optional. To overwrite existing facilities, select the **Update Existing** checkbox.
6. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **PROCEDURE CODES** tab, select **IMPORT CPT**.
4. Select **Choose File**, browse for and select the file to import, and select **Open**.
5. Optional. To overwrite existing facilities, select the **Update Existing** checkbox.
6. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **NDC CODES** tab, select **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 UOM dropdown list.
Labeler Name	Type the name of company corresponding to the labeler code segment in the Product NDC.
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. Select **SAVE**.

Import NDCs

Hint: Select 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 options in the previous table.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **NDC CODES** tab, select **IMPORT.**
4. Select **Choose File**, browse for and select the CSV file, and then select **Open**.
5. Optional: To append (and not overwrite) the CSV file to existing NDCs, select the **Update Existing** checkbox.
6. Select **IMPORT**.

About 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 and schedule rules.

See also:
About schedule templates and schedule rules

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 timeslot 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

To configure a schedule template:

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **SCHEDULE TEMPLATE** tab, select **ADD TEMPLATE**.
4. Type a name and description for the template and then select **SAVE**.
5. Under **Schedule Rules**, select **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 checkbox 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. Select the hexadecimal color code box, and then use the color picker to assign a color to the block.
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...** checkbox 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

Setting	Description
	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, select **SAVE**.
   - Select **SAVE & CLOSE**.

See also:
About schedule templates and schedule rules

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **SCHEDULE FILTER** tab, select **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.
Locations	Select a facility in the dropdown 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 select 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. Select **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, select **SETUP**.
2. Next to the burger button, select 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** dropdown list, select a facility, and then select **ADD.**
4. Enter the following settings.

Group	Setting	Description
General	Status Code	Type your internal code for the status.

Group	Setting	Description
	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 Mobile RAD. For use with the Mobile RAD app.
	Color Code	Select 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.
	[Other checkboxes]	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 button list.
Notification Settings	Email/Fax Template	Select templates that determine whether and to whom notification is made when a study arrives at the status.

5. Select **SAVE.**

See also:
Require document review

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **STUDY STATUS** tab, select the **STUDY FLOW** sub-tab.
4. In the **Facility** dropdown 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, select the triangle on an arrow connecting status nodes, select a routing rule, and then select **OK**.
8. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **TRANSCRIPTION TEMPLATE** tab, select **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 dropdown list and then select the plus + button. You can assign the template to multiple users.
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. Select **SAVE.**
6. In the template editor, type text and apply formatting for the template, and then select **SAVE & CLOSE**.
7. Optional. To paste items onto the template that you copied from outside of Exa PACS/RIS, on the **HOME** tab, select **Paste**, and then in the button shortcut menu, select **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 with the following steps, and then continue to the next procedure to edit the header or footer.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select 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, select the copy button of the existing template.
   - To start a new template from scratch, select **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 dropdown list.
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.
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. Select **SAVE**.
5. Perform the steps in the following subsections 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, select **SETUP**.
2. Next to the burger button, select 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, select the **PAGE HEADER/FOOTER** sub-tab.
5. The word processor appears (it may take a few moments).
6. On the **INSERT** tab, select Header, and then in the button shortcut menu, select **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 that follow.
10. Select **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, select **SETUP**.
2. Next to the burger button, select 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, select the **REPORT SIGNATURE** sub-tab.
5. Type information for the signature.

6. Optional. To add merge fields, see “Add merge fields” later in this topic.
7. Select **SAVE**.

Add a logo

1. Prepare a bitmap image and save it in the following:
   [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, select **Image**, and then in the button shortcut menu, select **Image**.
4. In the **Open File** dialog, type the name of the bitmap image and then select **Open**.
5. In the image shortcut menu, select **Format**.
6. In the **Image Attributes** dialog, under Wrapping Style, select **In Line**, and then select **OK**.
7. Optional. On the **HOME** tab, select the text alignment tools, or drag the image to position it.
8. Select **Save**.

Add a table

1. On the **INSERT** tab, select **Table**.
2. In the **Insert Table** dialog, enter table settings and then select **OK**.
3. Type information in the table as needed.
4. Optional. Add merge fields to the table.
5. Select **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, select **Merge Field**.
3. On the **Merge Field** button shortcut menu, hover over a category, and the select a field in the submenu.
4. Select **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, select **SETUP**.
2. Next to the burger button, select 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 select **SAVE.**
4. On the **COGNITIVE STATUS** tab, in the **Description** box, type a cognitive status and then select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **APPOINTMENT TYPES** tab, select **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.
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 select the plus button. Add as many keywords as needed.

5. On the **APPOINTMENT TYPE PROCEDURES** sub-tab, select **ADD**.
6. In the **Appointment Procedure** dialog, select a procedure or service and other settings, and then select **SAVE**.
7. On the **EXAM PREP ROOM LEVEL CONFIG** tab, add or edit exam prep instructions as needed.
8. Select **SAVE**.

See also:
Configure exam prep instructions

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 > Appointment Types**, open a type to edit.
2. On the **EXAM PREP/ROOM LEVEL CONFIG** sub-tab, select **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. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. On the **APPOINTMENT TYPES** tab, select **ADD**.
4. Select the **Grouped Appointments** checkbox.
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).
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 select the plus button. Add as many keywords as needed.

6. Select **SAVE**, and then in the message box, select **YES**.
7. In the **Appointment Types** dialog, in the **Appointment Type** dropdown 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. Select **SAVE**, and then in the message box, select **YES**.
10. Repeat steps 6–8 until all appointment types are added to the grouped appointment.
11. On the **APPOINTMENT TYPES** tab, select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Scheduling & Codes**.
3. Select the **LOCKED SLOTS** tab.

Configure WCB injury codes

To configure WCB injury codes for use in other parts of the program:

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

Setting	Description
Type	Select Nature or Area.
Code	Type the WCB code.
Description	Type a description for the appointment type.

5. Select **SAVE**.

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 computer, 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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **DICOM**.
3. On the **AE TITLE** tab, select **ADD.**
4. Enter the following settings, and then select **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.

Setting	Description
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. **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).
Match on ULI	Select to ignore issuer type and match patients based on ULI.
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 in the **Issuer** list. **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 makes available 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 checkbox 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 when sending as DICOM. **Note**: When DICOM-sending, the report status (such as Approved or Transcribed) is not included. To include the status, send via Opal.

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. Save the AE, and then open it again for editing.
4. Select **ADD CONFIGURATION**.
5. In the **Configuration** dialog, 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. Select **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, select **SETUP**.

2. Next to the burger button, select the word in all caps, and then select **DICOM**.
3. On the **FILE STORE** tab, select **ADD.**
4. Type the server name, root directory, and notes, and then select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **DICOM**.
3. On the **ROUTING RULES** tab, select **ADD.**
4. Enter the following settings. The available settings change depending on the AE type that you select in the Type dropdown list.

Setting	Type	Description
Rule Name	All	Type a name for the rule.
Type	All	Select the transaction to perform with the AE (for example, SEND).
Interface/Trigger Name	HL7 Send	Select an interface and/or trigger for HL7 send actions.
AE Title	SEND PRINT QUERY/RETRIEVE Send Report (Opal) LOCAL_CACHE	Select the AE with which to perform the transaction (for example, select Remote_Hospital to send to that AE).
Priority	SEND PRINT QUERY/RETRIEVE Send Report (Opal) HL7 Send LOCAL_CACHE	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	SEND PRINT QUERY/RETRIEVE Send Report (Opal) HL7 Send	Type the number of attempts the program should make to apply the rule.

Setting	Type	Description
	LOCAL_CACHE	
Priors	QUERY/RETRIEVE	Type the number of priors to retrieve. Type `0` (zero) to specify all priors.
Modality	QUERY/RETRIEVE	Select an option to filter which priors to retrieve.
Number of Priors to Send	SEND LOCAL_CACHE	Type the number of priors to send along with the study.
Auto Send Priors	SEND LOCAL_CACHE	Select to send any priors found in the system along with the current study, and to make the Relevant Priors checkbox available. • The system sends as many priors as it can find, up to the number you specify previously. • The system sends the most recent priors first.
Relevant Priors	SEND LOCAL_CACHE	Select to send relevant priors when auto-sending, and then enter criteria to define what is relevant. Selecting this checkbox makes the Force Relevant Only checkbox available. • If you do not specify criteria (see later in this table), the system considers relevant priors to be studies of the same modality and/or body part. • The system sends as many relevant priors as it can find, up to the number you specify previously. • If the system finds fewer relevant priors than the number specified, it adds non-relevant priors up to the number specified.
Force Relevant Only	SEND LOCAL_CACHE	Select to prevent sending of non-relevant priors. • If the system finds fewer relevant priors than the number specified previously, it does not send any additional priors.
[Relevant priors settings]	SEND LOCAL_CACHE	Available when you select **Relevant Priors**. Type or select which priors (the leftmost criteria) you consider relevant to which modalities (the rightmost criteria). Select **SET**, and then specify additional prior modality pairings as needed.

5. Optional. Configure a criterion for the rule:
   a. In the **Field** dropdown list, select an argument.
      For example, *Modality*.
   b. In the list that appears, select a matching value for the argument.
      For example, in the *Modality* list, select *MG*.
   c. Select **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.
6. Optional. Add more criteria.
7. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **DICOM**.
3. On the **AE SCRIPTS** tab, select **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, select the help ? button.
6. Select **COMPILE**, and correct any errors that occur.
7. When the script is free of errors, select **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 particular computer. Therefore, to improve speed, you can apply different rules on different computers.

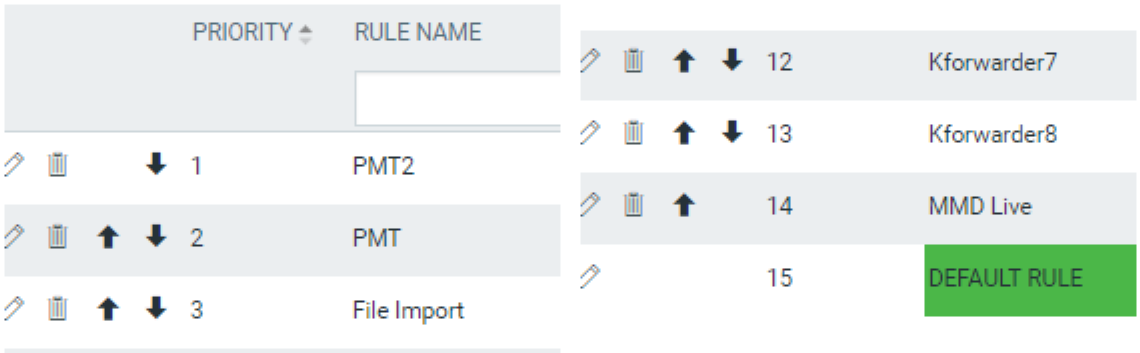
To understand how receiver rules are evaluated and applied, it is helpful to imagine a 4-step process that Exa PACS/RIS performs for each incoming study.

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

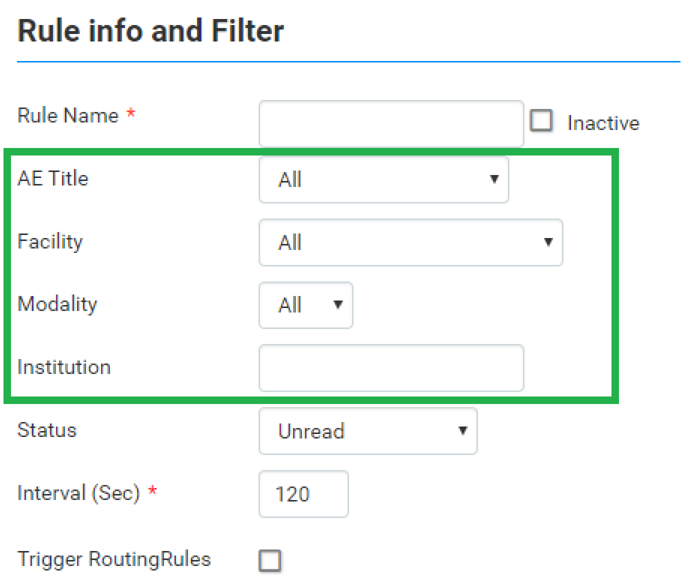
When Exa PACS/RIS receives a DICOM study, it evaluates the study against each receiver rule on the RECEIVER RULES tab in order of “Priority” (starting from the top) until it finds one that matches.



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 following figure) to the information in the study. If all relevant criteria match, the rule becomes active, and the process continues to step 2.



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

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

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

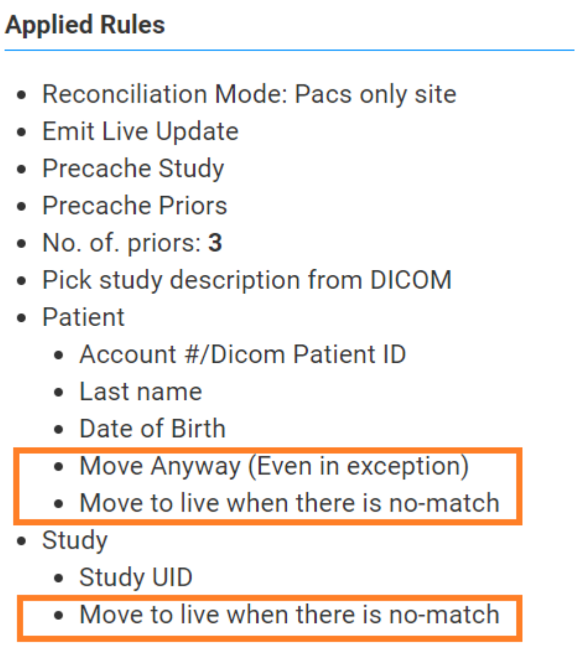
If matching succeeded, Exa PACS/RIS waits the number of seconds specified in the **Interval** setting from step 1, moves the study from the QC tab to the ALL STUDIES tab (the study “goes live”), and assigns to the study the status selected in the **Status** dropdown list from step 1. At the same time,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

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 following figure.



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

Setting	Description
Rule Name	Type a name for the rule.

Setting	Description
AE Title	Use these settings as filtering criteria. For example, to evaluate the rule only against mammography studies, on the Modality dropdown 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 make alternate account numbers available. See Use alternate account numbers.

5. Select 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. Select **SAVE.**

Configure matching rules

See Work with Display Management.

Configure hanging protocols

See Work with Display Management.

Manage jobs in the transfer and SR queues

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **DICOM**.
3. On the **TRANSFER QUEUE** or **SR 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, select the expand + button.

Change the job priority

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

View job details

To view demographics and other queue details, select the view button.

Cancel a job

To cancel a job, select 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 selecting 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 select 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, select **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** dropdown list, select the AE whose jobs you want to reprocess.
4. Select **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 select **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 select **Cancel**.

Configure an issuer of a PID

See Use alternate account numbers.

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.
2. Configure a routing rule 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 YYYY-MM-DD formatting).

3. Configure a study flow from Scheduled to Confirmed status using the previous routing rule.

See also:

Configure application entities
Configure routing rules
Configure study flow

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, select **Billing**.
2. On the top navigation bar, select **Studies** or **Claims**.
3. On the toolbar, select the settings button.
4. In the **User Settings** dialog, under **Column Order**, do one or more of the following.
   - To show or hide a column, select or clear its checkbox.
   - 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. Select **SAVE.**

Add codes and other basic data

You can add codes, classes, statuses, providers, qualifiers, clearinghouses (including the WCB), and reasons. The basic procedure for adding these data types is as follows.

1. On the burger menu, select **Billing**.
2. On the top navigation bar, select **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, select **ADD**.
5. Enter the information in the dialog, and then select **SAVE**.

See also:

About exchanging files with healthcare agencies
Create or edit an EDI or ERA template
Configure claim validation
Create or edit an EDI or ERA template
Configure an EDI clearinghouse
Insurance mapping
Create a printer template

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, select **Billing**.
2. On the top navigation bar, select **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.

Setting	Description
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. Select **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 options. You can select which options are required.

1. On the burger menu, select **Billing**.
2. On the top navigation bar, select **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 options, select the ones that you want to be required.
5. Select **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, select **Billing**.
2. On the top navigation bar, select **Setup** > **Billing Providers**, and then select **ADD**.
3. Enter information as needed, and then select **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. A pre-configured EDI template is available for Alberta WCB format.

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

Configure an EDI clearinghouse

To process transactions through a clearinghouse, you must configure one as follows. If you transact with the Alberta, Canada healthcare system, add the Alberta WCB as a clearinghouse.
Prerequisite: Obtain credentials and other connection information from the clearinghouse.

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

2. On the top navigation bar, select **Setup** > **EDI CLEARINGHOUSES** > **ADD**.
3. Enter all relevant information for the clearinghouse and select **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, select **Billing**.
2. On the top navigation bar, select **Setup** > **Billing Messages**.
3. To find a code, enter a criterion in the **CODE** box and then select **Enter**.
4. In the list of codes, double-click a row, enter a description, and then select **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, select **SETUP**.
2. Select the word in all caps, and then select **Billing**.
3. On the **INSURANCE PROVIDER** tab, select **ADD.**
4. Enter the following information for the provider.

Setting	Description
Code	Type the insurance provider's plan ID.
Inactive	Select this checkbox 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 the insurance provider's ID (or ID 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 list.
Facilities	Select the facilities where you see patients with this insurance provider.
Provider Type	Select a provider type.
SOP Payer	Select a source of payment code for the provider.
Fee Schedule	Select the default billing fee schedule used for the provider.
Allowed Fee Schedule	Select the allowed fee schedule for the provider.

Setting	Description
Trading Partner ID	[Not used in Alberta]
Website	Type the URL to the provider’s website, if available.
Insurance Provider Alerts	Type alerts as needed.

5. Select **SAVE**.

See also:
[Add an insurance provider payer type]
[Configure a fee schedule]

About active and inactive insurance

Insurance providers can be inactivated, but individual patient insurance policies from those providers can also be inactivated from the patient chart. When adding insurance to an order, the following describes the relationship between the two.

Insurance Provider	Order Status	Policy Valid To Date	Policy Status
Active	Unscheduled	< Current date	Inactive and unavailable.
		≥ Current date	Active and available.
		None	Active and available
	Scheduled	< Scheduled date	Inactive and unavailable.
		≥ Scheduled date	Active and available.
		None	Active and available
Inactive	Scheduled or Unscheduled	Any	Inactive and unavailable.

* *Unavailable* means that it cannot be added to the order, or selected anywhere in Exa PACS/RIS. If the policy was previously added to a patient chart, it is still be viewable but cannot be edited or used for billing or other purposes.

See also:
[Add an insurance provider]

Import an insurance provider

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

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

Add an insurance provider payer type

You can create insurance provider payer types.

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

Add a provider level code

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

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

Add a POS map

With a *POS* (*place of service*) *map*, you can specify default locations to which to dispatch mobile radiology orders from providing entities. For example, an ordering facility might typically dispatch its orders to the patient's residence rather than its own location, and you can pre-configure this arrangement by using a POS map.

1. On the burger menu, select **SETUP**.
2. Select the word in all caps, and then select **Billing**.
3. On the **POS MAP** tab, select **ADD.**
4. Enter your internal code, name, POS code, POS address.
5. In the **Mobile Rad Dispatching Address** dropdown list, select one of the following.

Setting	Description
Facility	Dispatch to the address of the Facility.
Ordering Facility - Study	Dispatch to the OF address selected for the study.
Ordering Facility - Patient	Dispatch to the OF address selected in the patient chart.
Ordering Physician	Dispatch to the address of the ordering physician.
Patient Residence	Dispatch to the address of the patient.

6. Select **SAVE**.

Insurance mapping

Insurance mapping means to assign a billing method (such as electronic) to an insurance provider or other payer.

Prerequisite: Add an insurance provider.

1. On the burger menu, select **Billing**.
2. On the top navigation bar, select **Setup** > **Insurance Mapping**.
3. Double-select an insurance provider in the list.
4. In the **Billing Method** dropdown list, select an item, and then enter information as needed in the other options.
5. Select **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 menu, select **Billing**.
2. On the top navigation bar, select **Setup** > **Printer Templates**.
3. At the upper-right, select **ADD.**
4. Optional: To base your template on the default, select **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. Select **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.

1. On the burger menu, select **Billing**.
2. On the **Studies** or **Claims** tab, on the toolbar, select the settings button.
3. In the **User Settings** dialog, 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.
   Special Form - Select to use special-case forms, such as for claims in New Jersey.
4. Select **SAVE.**

See also:
[Create a printer template]

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.

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

See also:
User rights
Create a user group
Create a user

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, select **Setup**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. On the **USER GROUPS** tab, select **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. Select **SAVE**.

See also:

Create a user

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: Create a user group.

1. On the burger menu, select **Setup**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. On the **USERS** tab, select **ADD**, and the enter the following settings.
   Not all settings may be available depending on your product and configuration.

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.
Netcare access	Select to grant permission to access Alberta Netcare (Alberta only).
Password	Type a sign in password for the user. This option 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 assign "super user" rights to the user regardless of roles or groups.
Linked Ordering Facility	This dropdown list becomes available when you select Ordering Facility in the Linked Provider User Type dropdown list. Select ordering facilities to appear on orders the user creates in the Ordering Facility portal.
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	[reserved, do not select]

Setting	Description
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, the previous Linked Ordering Facility and Ordering Facility dropdown lists appear.
Ordering Facility	Appears when you select Ordering Facility in the Linked Provider User Type dropdown list. Select the ordering facility into whose portal the user can sign in.
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. Select **SAVE**.
5. Optional.
    - To limit what the user can view on the worklist, see Configure an administered worklist filter.
    - To view a user's devices, select the **ATTACHED DEVICES** sub-tab.
    - To restrict the user's access to specific ordering facilities, select the **USER PERMISSIONS** sub-tab.

See also:
Create a user role

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, select **Setup**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. On the **USERS** tab, double-click the user in the list and do one of the following.
    - Select **RESET PASSWORD**, and then choose a new password for the user.
    - Select the **User Must Change Password Next Login** checkbox.
4. Select **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 an administered worklist filter

In addition to user roles, administrators can use the steps below to configure worklist filters that control which studies, patients, and other information are available to individual users and user groups. Users can configure their own worklist filters but cannot edit filters that administrators configured for them.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select 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, select **GENERAL**.
2. Enter the following settings, and then select **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 following settings 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 described later. *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*: 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, select **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 select the plus button to add the criterion.
3. Under **Account No.**, perform the previous step as appropriate for the account number.
4. Select **SAVE**.

Limit access to study information

You can limit the worklist to only display studies that satisfy certain criteria.

1. In the left pane, select **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. Select **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, select **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 select the plus button.
3. Select **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, select **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 select the plus button.
3. Select **SAVE**.

See also:

[Create a user worklist filter]

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. To view a list of current users, select the **USERS ONLINE** tab.
4. Optional: To view a session log for a user, select 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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. Do one or both of the following.
   - To view studies assigned to you, select the **ASSIGNED STUDIES** tab, and then select a sub-tab to filter by user type.
   - To view patients assigned to you, select the **ASSIGNED PATIENTS** tab.

Assign 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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. On the **THIRD PARTY TOOLS** tab, if the **Search users** box does not appear, select **Ungroup** users.
4. To select one or more users:
   - To select a single user, in the **Search users** box, type all or part of the user name, select **Ungroup** users, and then select the correct user in the list.
   - To select one or more user groups, select the **Remove All Users** button (to show the Select All Users button), select the user group to select, and then select **Select All [Group] Users**.
5. In the **Third Party Tools** list, select which tools to make available to the selected user or users by turning the tool's switch from off to on.
6. Optional: Edit tool configuration settings.

Configure an nVoq user account

To use nVoq for voice recognition, KM staff must configure nVoq user accounts in Exa PACS/RIS. Obtain user account information from the nVoq website.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. On the **THIRD PARTY TOOLS** tab, on the left side, use the group boxes to select a user.
4. On the right side, in the **nVoq** box, enter the user's account information.
5. Turn on nVoq →
6. Click **APPLY TO SELECTED USERS**.

See also:
Dictation and transcription with Exa Trans and nVoq

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **User Management**.
3. On the **COPY PROFILE SETTINGS** tab:
   - In the **Source User** dropdown list, select the user whose settings you want to copy.
   - In the **Destination User** dropdown list, select a user to configure with the source user's settings, and then select the plus button.
   - Optional. Repeat to configure additional users with the source user settings.
4. Select **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. Configure a technologist, and assign a schedule template to that technologist.
2. Configure an ordering facility.
3. Configure a place of service (Add a POS map).
4. Configure vehicles.

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Mobile RAD**.
3. On the **VEHICLE REGISTRATION** tab, select **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**, select the plus button, and then in the **Equipment** dialog, enter settings for each piece of radiology equipment in the vehicle.
5. Under **Maintenance**, select the plus button, and then in the **Maintenance** dialog, enter vehicle maintenance information.
6. Under **Location**, select the plus button and then enter settings for each location where the vehicle is parked on particular days.
7. Select **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 Add a custom form to a patient record.

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **General**.
3. On the **FORM BUILDER** tab, select **ADD**.
4. Type a name for the form.
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 setting 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 setting 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 setting 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 setting 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 dropdown list.
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. Select **SAVE**.

Add a header to a study form

1. At the top of the **FORM BUILDER** tab, select the **Header** checkbox.
2. In the form area, select the word “Header.”
3. In the left pane, on the properties tab, select **CHANGE LOGO**.
4. Browse for and select a logo, and then select **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. Select **Save**.
    Your header could look something like the following.

Add text controls to a study form

Use text controls 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 controls.

	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 control:

1. Drag the **Text Box**, **Text Area**, or **Free Text** button onto the form.
2. Select 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 control 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 control, use the **Padding** slider.
   - To apply adjustments to all controls on the form at once, select **Apply Spacing to All** checkbox, 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, apply formatting to your text as needed by using the **Style** controls.
   - To adjust the width of the text control, select an option in the **Size** dropdown list.
4. Select **SAVE**.

Add an image to a study form

1. To add an image, drag the **Image** button to the form.

2. To give the image a title, select **Untitled**, and then type a title.
3. Double-click the box below the title, and then browse for and select an image file.
4. On the left pane, use the controls to modify the alignment and size.
   Note: If you select a size of Original, the image expands to fit the width of the page.

Add checkboxes to a study form

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

Add options to a study form

While checkboxes 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 checkbox groups, except that you drag the **Radio Button** button onto the form instead of the Checkbox button.

Add a group box to a study form

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

1. Drag the **Group** button onto the form.
2. Select 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, select **CHANGE IMAGE**, browse for and select an image, and then select **Open**.
4. To divide the group into columns, in the **Grid Columns** dropdown list, select a number of columns.
5. To add a checkbox group or radio button group into a particular column, in the **New Control Placement** dropdown list, select the number of the column, and then drag the **Checkbox** or **Radio Button** button onto the group.
6. Configure the checkboxes and/or radio buttons as described in "Add checkboxes to your form."
7. Select **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** checkbox.
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. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **General**.
3. On the **FORM BUILDER** tab, select a form, and then select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **General**.
3. On the **FORM BUILDER** tab, select **IMPORT.**
4. In the **Import Study Forms** dialog, select **CHOOSE FILE**, browse for and select the copied JSON file, and then select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **General**.
3. On the **CUSTOM FORMS** tab, select **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" later in this topic).
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.

Setting	Description
Facility	Select a facility to which to assign the custom form, and then select 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 setting 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 setting 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 setting required.
Male/Female/Mammo Patient Only	Select to restrict availability of the form to male, female, and/or mammography patients.

7. Select **SAVE**.

About adding contents to a custom form

The custom form word processing area provides commonly recognizable tools to type, align, and apply formatting to text, and insert images and merge fields. You can copy and paste contents by using the **Ctrl+C** and **Ctrl+V** keyboard shortcuts. To change font sizes, select text that you want to resize, and then select a size in the **Font Size** dropdown 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. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **General**.
3. On the **CUSTOM FORMS** tab, select the form button of the custom form that you want to edit.
4. Edit the form as needed, and then select **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, select **SETUP**.

2. Next to the burger button, select the word in all caps, and then select **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** checkbox, type the name of the institution in the box, and then select **ADD**.

4. To run the search, select **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, select **CSV REPORTS**.

About email templates and notification templates

Email templates and *notification templates* contain pre-formatted text that you can have Exa PACS/RIS automatically send through and along with various media. Note that the original term *email template* now also applies to non-email media such as faxes. Commonly, you use **email templates** to auto-send reports to providers and patients, and **notification templates** to auto-send study status changes to referring providers. The table below summarizes the differences in auto-sending media based on the type of template.

To create templates, see Configure an email template and Configure a notification template. To configure auto-sending of media using the templates, see Set up emailing of exam results and Set up sending of notifications.

Feature	Auto-Sending of Media Based On:	
	Email Templates	Notification Templates
Where to configure template	Setup > [all caps button menu] > General > **Email Template**	Setup > [all caps button menu] > General > **Notification Templates**
Who can receive media	Referring provider locations/contacts, referring provider group, referring provider's patient (in Patient Portal)	Referring provider locations/contacts

What media are sent	In addition to text defined in the template: **Reports** PDF attached to email Link attached to email Print and mail Print on selected printers Fax to referring providers Fax to referring provider's office **Images** CD, Film, Paper	Email or fax of status changes, including text defined in the template.
How to turn ON/OFF auto-sending	Select checkboxes in "Reports to Me"	• Select checkboxes is "Notification Settings," and • Select notification template in each status at which you want to auto-send.

Configure an email template

Follow the steps below to configure an email template. To use the template to auto-send emails and other media, see Set up emailing of exam results.

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

Setting	Description
Template Name	Type a name for the template.
Category	Select the type or purpose of the template.
Subject	Type text to appear on the media's Subject line.
Markets	Select the market for which the template is available. All facilities associated with the select market become selected in the Facilities list.
Facilities	Select the facilities to whose studies the template applies.

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 here** box, type a category of information (e.g. `Patient`).
      Note: Category searches are case-sensitive.
   b. In the resultant **Merge Fields** list, select a merge field group (e.g. **Patient**).
   c. Double-click a merge field to add it (e.g. Fullname).
6. Select **SAVE**.

See also:
About email templates and notification templates

Set up emailing of exam results

By completing the following tasks, Exa PACS/RIS automatically sends exam results and reports to the referring provider locations/contacts you modify.
Prerequisite:
Administrators must configure the company's email server (under Configure your company, see "Configure general settings").

Tasks:

- Configure an email template.
- Add a facility, and configure all email- and fax-related settings.
- If you want to email a provider group or location, Add a provider group or location.
- Configure a referring provider location/contact, including the **email address**, **fax numbers**, and options under **Reports to Me** (see Add a resource).

See also:
About email templates and notification templates

Configure a notification template

Follow the steps below to configure a notification template. To use the template to auto-send status change emails or faxes, see Set up sending of notifications.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **General**.
3. On the **NOTIFICATION TEMPLATES** tab, select **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 which the template is available. All facilities associated with the select market become selected in the Facilities list.
Facilities	Select the facilities to whose studies the template applies.

4. Use the word processing tools to compose the template.
5. To automatically insert exam details into the notification:
   a. In the right pane, in the **Search here** box, type a category of information (e.g. `Patient`).
      Note: Category searches are case-sensitive.
   b. In the resultant **Merge Fields** list, select a merge field group (e.g. **Patient**).
   c. Double-click a merge field to add it (e.g. Fullname).
6. Select **SAVE**.

See also:
About email templates and notification templates
Merge fields

Set up sending of notifications

By completing the following tasks, Exa PACS/RIS automatically sends status change email notifications to the referring provider locations/contacts you modify.

Prerequisite:

Administrators must configure the company's email server. In Configure your company, see "Configure general settings."

Tasks:

- Configure a notification template.
- For each status of which you want to auto-send notification, select the notification template under "Notification Settings" (see Configure study statuses).
- Configure a referring provider location/contact, and select the location/contact's **Email/Fax** and/or **Receive When Added as a CC Provider** checkboxes (see Add a resource).

See also:

About email templates and notification templates

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

See also:
Work in the dispatching dashboard

Open the dashboard

- On the burger menu, select **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, select its remove button.
2. To add a gadget, find the **Add Gadget** gadget and select the add button.
3. In the list of gadget types, select 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, select the graph button.
2. In the button shortcut menu, select 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, select the facility button.
2. In the button shortcut menu, select a facility or select **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, select the date range button.
2. In the button shortcut menu, select a date range and then select **Apply**.

Work with the worklist

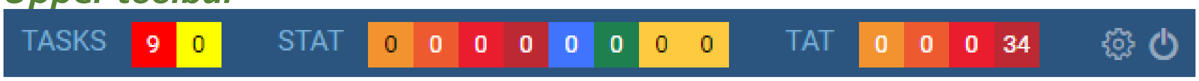
The worklist is the starting point for most operations in Exa PACS/RIS. The worklist is a searchable and highly customizable list of patients, studies, and series, providing full access to demographics and images.

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

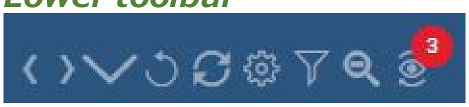


1 2 3 4 5

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

1	**Tasks**	Shows the number of tasks by urgency. Select 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

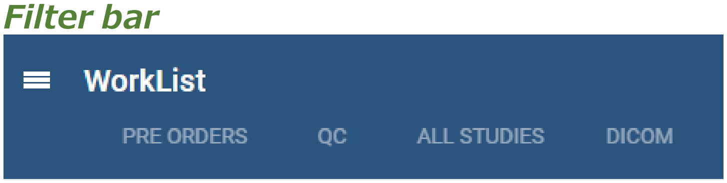


1 2 3 4 5 6 7 8

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.
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 select the Exceeds Maximum Time Limit link at the bottom of the worklist, this tab opens and lists relevant studies. Select the pushpin button on the tab to display a dialog 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, select a tab to display the filter.
2. In the lower toolbar, select the **Show all Tabs by list** button, and then select a filter.

Create a user 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, select the filter button.
2. In the **Study Filter** dialog, select **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.

Setting	Description
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.
Show Pre-Orders Only	Shows only pre-orders.
Deleted	Shows all (deleted and non-deleted) studies, no deleted studies, or only deleted studies.
Assign	Available when you select Is Private. 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.

Note: When available, you can use the **Is** operator and **Blank** criteria to search for studies that are missing information. For example, in the **INSURANCE** category, under **Insurance Provider**, select **Is**, and then select **Blank** to search for studies with no insurance.

4. Select **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, select the filter button.
2. In the **Study Filter** dialog, find the filter to edit or delete.
3. Select 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, select the filter button.
2. In the **Study Filter** dialog, double-click the filter to show or hide.
3. In the second **Study Filter** dialog, select or clear the **Display as a Tab** checkbox and the **Display in Dropdown** checkbox.

Select a quick filter of the pre orders tab

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

Quick Filter Checkbox	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, select the settings button, and then in the button shortcut menu, select **User Settings**.
2. In the **User Settings** dialog, under **Column Order**, do one or more of the following.
   - To show or hide a column, select or clear its checkbox.
   - 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. Select **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, select the settings button, and then in the button shortcut menu, select **User Settings**.
2. In the right side of the **User Settings** dialog, configure the following settings and then select **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 selecting 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 checkbox 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 selecting the CREATE ORDER button (Exa PACS/RIS only).
Auto-Open Appointment Confirmation	Select to automatically open the appointment confirmation screen after selecting the CREATE ORDER button (Exa PACS/RIS only). 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.
Audio Player Lag Time	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. **nVoq (Exa Trans)**: Opens Exa Trans with nVoq voice recognition.
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

Open the worklist

- On the burger menu, select **WORKLIST**.
  Initially, the worklist is empty until you add filtering criteria (see Find and view studies and Create a user worklist 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 select **Enter**.
   - Select a column header to sort the list.
2. Double-click a study in the list to open it for viewing or editing.

See also:
Search syntax

Open a pop-up window for physicians and ordering facilities

From the worklist, you can open a pop-up window to display the contact information of a study's physician or ordering facility.

1. In the worklist, find a study.
2. In the **REFERRING PHYSICIAN** or **ORDERING FACILITY** column, select the doctor symbol.

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** checkbox.

1. In the worklist, find a study.
2. On the study toolbar, select 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** checkbox.

1. In the worklist, find a study.
2. On the study toolbar, select 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, select 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, select 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.
	Checkbox	Select to select the study for further processing by commands in the PACS Actions menu.
	DICOM Viewer	Open the study in the Exa PACS viewer. This button is only available for studies that contain images.
	Opal Viewer	Open the study in the Opal viewer (see Install Opal Viewer). This button is only available for studies that contain images.
	Edit	Opens the study for editing.
	VIP	If solid green, the study is conducted on a VIP.
	View Transcription	Opens the dictation and transcription editor.
	Multi-panel	Opens the study in the multi-panel, an operating panel for working with dictation, transcription, documents, notes, and other information.
	Approved Report	Opens approved reports of the study.
	External app.	Opens the current study in an external application if configured.
	Authorization	**Red star**: Select to manually authorize. **Green star**: All insurance levels (primary, secondary, tertiary) that require authorization have been authorized. **Gray star**: No authorization is needed.
	Unread DICOMs	Select to view unread images. In the Unread DICOMs dialog, select 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 also:
Work with the Exa PACS/RIS viewer
Edit study screen
Dictation and transcription with Exa Trans2
Worklist shortcut menus
Configure opening of a third-party program
About VIPs
Manually authorize an exam

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

See also:
[Manually authorize an exam]
[About VIPs]

Manually authorize an exam

Exams that satisfy pre-configured authorization rules appear on the worklist with a red or yellow star, indicating that you must authorize them.

1. In the worklist, find a study with a red or yellow star, select the star, and then select the study description in the pop-up window.
2. In the **Manual Authorization** dialog, in the **Insurance Level** dropdown list, select an unauthorized insurance level.
3. Fill in the remaining options with information from the insurance provider.
4. For studies in **Need authorization** status (red star), select:
   SAVE - Authorize, and save the authorization number
   PENDING - Place the exam in Pending authorization status
   DENIED - Deny the exam
5. For studies in the **Pending authorization** status (yellow star), select:
   SAVE - Authorize, and save the authorization number
   RESET - Reset the authorization status to Need authorization (red star)
   DENIED - Deny the exam
6. Optional. Select **Eligibility/Estimation**, and then follow steps in topics below to verify eligibility and estimate insurance coverage. (Available with Eligibility user rights.)

See also:
[What are authorization, verification, and estimation?]
[Add authorization rules]
[Manually unauthorize an exam]
[Verify eligibility of pre-orders and studies with PokitDok]

Manually unauthorize an exam

If a previously authorized exam is no longer authorized, you can unauthorize the exam by deleting the original authorization.

1. In the worklist, find an authorized study (green star), and then select the star.
2. In the **Manual Authorization** dialog, in the **Insurance Level** dropdown list, select an authorized insurance level, and then select **DELETE**.
3. Optional. In the **Insurance Level** list, select **Reauthorization Needed** to place the exam in the Reauthorization needed status (orange star).

See also:
[What are authorization, verification, and estimation?]
[Manually authorize an exam]

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, select **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

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.
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).
Critical findings	Medical findings that you can customize. In Exa Trans, you can select critical findings in a list to send notification to the referring physician.
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 also:
Change the urgency of a study
Change the priority of a study
Assign critical findings to a study
Flag a study
Flag an order
Change the priority of an order
Assign critical findings to an order

Use local caching

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

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, select the **ALL STUDIES** tab.
2. On a shortcut menu of a study that contains images, hover over **Images**, and then select **Server Prefetch**.

Prefetch studies to your local cache

You can manually prefetch studies "on demand."

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

Prefetch studies to other local caches

1. On the worklist, select the **ALL STUDIES** tab.
2. On the shortcut menu of a study that contains images, hover over **Images**, and then select **Send to Local Cache**.
3. In the **Local Cache** screen, in the list of available caches, select to the left of one or more destination caches.
4. Do one of the following.
   - To send to the selected caches, select **LOCAL CACHE SELECTED**.
   - To send to all caches, select **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.
- Create a routing rule for type LOCAL_CACHE, and select the AE title you created.

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 user worklist filter.
2. On the worklist, select the settings button, and then in the button shortcut menu, select **User Settings**.
3. In the **Default Filter (Local Cache)** dropdown list, select the worklist filter.
4. Select **SAVE**.

5. On your computer, 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.

See also:
[Install local cache]
[Configure application entities]
[Configure routing rules]
[Create a user worklist filter]

PACS Actions menu

The PACS Actions menu on the worklist provides top-level access to common functions. To open the menu, on the worklist, select the settings button on the lower toolbar. Descriptions of the commands on the menu follow.

Create a new study

To create a new study or create a new order (or to "enter a new study" or "enter a new order"), see topics below.

See also:
A typical scheduling workflow
Schedule an unscheduled order
Schedule a walk-in appointment

Schedule walk-ins

See Schedule a walk-in appointment.

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.

1. Place a CD in the drive.
2. In the worklist, select studies whose combined size does not exceed the capacity of the disk, and then do one of the following.
   - On the lower toolbar, select the settings button, and then in the PACS ACTIONS menu, select CD Burn.
   - On the study shortcut menu, select Send, and then select the AE title of the CD Burner in the dialog (see Send a study)
3. In the **Opal CD Burning** dialog, enter the following settings as needed, and then select **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.
Burning Speed	For best results, set a speed of x4 or less.

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).

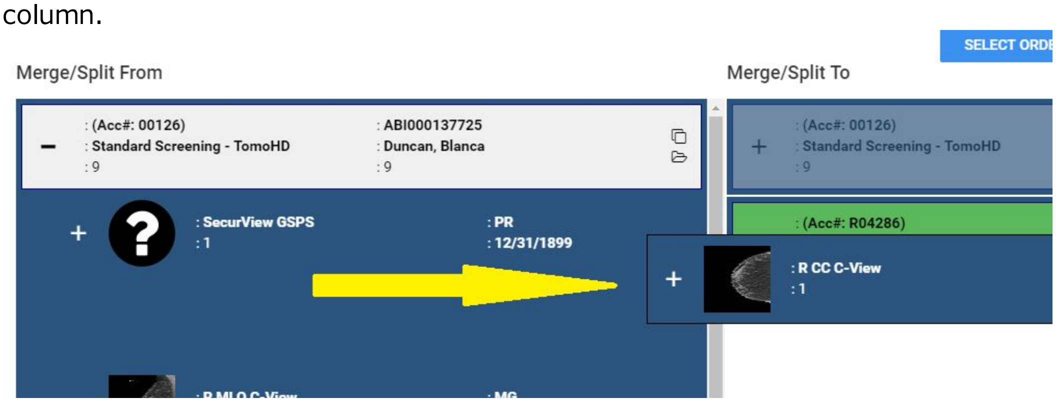
1. In the worklist, select two studies of the same patient to compare.
2. On the lower toolbar, select the settings button, and then in the **PACS ACTIONS** menu, select **Compare Study**.

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. As an alternative to merging studies, see Use 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, select the settings button, and then in the **PACS ACTIONS** menu, select Merge/Split.
3. In the **Merge/Split Study** screen, in the upper-left corner, select the button once or twice to activate **Move Selected** mode.
4. in the **Merge/Split From** column, select 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. Select **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, select 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. Select **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, select the plus sign of the second study to reveal its series.
3. In the left column, select one or more images to select them, then drag them onto a series in the right column.

4. Select **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, select **Merge/Split**.
3. Select 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. Select **SAVE CHANGES**.

Split images into their correct order

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

Add a new series to a study

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

Clone a study

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

See also:
Add studies to the merge queue
About the PID, MRN, and account numbers

Import DICOM images

You can import DICOM images to a study.
Prerequisite: Install Opal tools.

1. In the worklist, select a study into which to import images.
2. On the lower toolbar, select the settings button, and then in the **PACS ACTIONS** menu, select **Import Images**.
3. In **OpalImport**, select **Select Files/Folder or DICOMDIR to Import**.
4. In the **Open** dialog, browse for and select files to import, and then select **Open**.
5. In **OpalImport**, configure the settings in the following table.
   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.
Opal 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 could not be imported into a separate folder.
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. Select **Import**.
7. Optional. If you selected the Modify Demographics checkbox, the Modify/Confirm Demographics dialog appears. Do one of the following.
    - Under **New Info**, edit the demographics and then select **MODIFY**.
    - Under **New Info**, confirm that the demographics are correct, and then select **USE CURRENT**.
8. Select **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, select the settings button, and then in the **PACS ACTIONS** menu, select **Export Worklist**.
2. In the **Export Worklist** dialog:
    - 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 checkboxes.
    - Under Link to Download, select the link.

Worklist shortcut menus

Exa PACS/RIS and Symmetry PACS have a study shortcut menu (for studies in the Unread and later statuses). Additionally, Exa PACS/RIS has an order shortcut menu (for PRE ORDERS and studies in the Ordered status). 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, find a pre-order on the **Pre Orders** tab, or an unscheduled study on the **All Studies** tab.
2. On the order or study shortcut menu, select **Schedule Appointment**.
3. In the **New Appointment** screen, filter available timeslots by entering the following criteria.

Setting	Description
Distance from Patient	Type the patient’s ZIP code (see next row), and then select a distance. Timeslots 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 make the Distance from Patient filter available.
Carrier	Select the patient's insurance carrier.
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 timeslots falling within a date range.
Start/End Time	Select to only show timeslots starting within a time range.
AM/PM	Select one or both to limit your search to daytime or nighttime.
Days of the Week	Select one or more days that the patient would be available.
Additional Time	Select if the exam requires more time than the standard duration.

4. Select a timeslot in the list, and then select **UPDATE ORDER.**

Edit an existing order

You can edit a previously entered order from the worklist.

1. On the worklist, select the **PRE ORDERS** tab.
2. On the order shortcut menu, select **Edit Order**.
3. Edit the order and then select **SAVE.**
   Note: For details, see Edit order information.

Manually verify or clear eligibility of orders

If you determine that an order, pre-order, or study on the worklist satisfies payment provider eligibility requirements, you can mark it as Eligible (green check mark) on the worklist. If a study was previously manually verified, you can clear the Eligible status. Verifying or clearing does not affect the eligibility status in other parts of the program. To view the eligibility status, display the Eligibility column.
Prerequisite: Eligibility rights.

1. On the worklist, select the **PRE ORDERS** or **ALL STUDIES** tab.
2. On the order or study shortcut menu, select **Actions**, and then:
   a. To mark as eligible, select **Manually Verify Eligibility**.
   b. To clear the eligibility status, select **Remove Manual Eligibility Verification**.
3. In the **Eligibility** column, confirm that the green checkbox appears or disappears.

See also:
What are authorization, verification, and estimation?
Verify eligibility of pre-orders and studies with PokitDok
Configure worklist columns

Change the priority of an order

You can set the priority of an order.

1. On the worklist, select the **PRE ORDERS** tab.
2. On the order shortcut menu, hover over **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: Configure critical findings. See "Configure reason codes" in Configure your company.

1. On the worklist, select the **PRE ORDERS** tab.
2. On the order shortcut menu, hover over **Actions**, select **Critical Findings**, and then select 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.
Prerequisite: Create a study flag

1. On the worklist, select the **PRE ORDERS** tab.
2. On the order shortcut menu, hover over **Actions**, select **Flag**, and then select one or more flags.

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, select the **PRE ORDERS** tab.
2. On the order shortcut menu, hover over **Stat**, and then select a stat level.

Delete an order

You can delete orders from the worklist.

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

Delete one order

- On the order shortcut menu, hover over **Exam**, and then select **Delete Study**.

Delete multiple orders

- Select the checkboxes of multiple orders, and then on the shortcut menu, select **Delete Study**.

Require document review

When creating a scan document (or "document") type, you can 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" in Configure your company).
2. Select your document type, and then select the **Requires Review** checkbox.
3. Add a study status.
4. Edit the study status, select the **Document Review** checkbox, and then select the document types to review.

See also:
Configure study statuses

View or attach documents to an order

You can view attached documents, or scan documents to an order.

1. On the worklist, select the **PRE ORDERS** tab.
2. On the order shortcut menu, select **Attach Files**.
3. In the **Patient Document** dialog:
   - To view a document, double-click it in the list.
   - To attach a document, follow the procedures in the topics below.

See also:
Scan to a patient
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.

1. On the worklist, select the **PRE ORDERS** tab.
2. On the order shortcut menu, hover over **Actions**, and then select **Reset Authorization Days**, or **Modify Authorization Days**.
3. Optional. In the **Days Count** dropdown list, select a new number of days.
4. Select **SAVE**.

See also:
Add authorization rules

Assign a study to users

You can assign one study to one or more users, radiologists, or peer reviewers. 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, select the **ALL STUDIES** tab.
2. On a study shortcut menu, hover over **Exam**, and then select **Assign Study**.

3. In the **Study Assignment** dialog, in the **Assign to User** dropdown list, select a user and then select the add + button.
   Note: You can repeat this step to assign additional users.
4. Optional. In the **Assign to Radiologist** dropdown list, select a radiologist as the referring provider.
5. Optional. In the **Assign to Peer Reviewer** dropdown list, select a radiologist as the peer reviewer.
6. Select **SAVE.**

See also:
Assign a peer reviewer for a study
Create a user worklist filter

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, select the **ALL STUDIES** tab.
2. Optional. To start merging or splitting with one study at a time, on a study shortcut menu, hover over **Exam**, select **Merge/Split**, and then skip to the last step.
3. Right-click the first study, hover over **Exam**, hover over **Merge Queue**, and then select **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, hover over **Exam**, hover over **Merge Queue**, and then select **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, hover over **Images**, and then select **Create Teaching Study**.
3. In the **Teaching Study** dialog, in the **AE Title** dropdown list, select an **AE title**.
4. In the **New Value** column, type or select anonymous values for the new study, and then select **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, select the **ALL STUDIES** tab.
2. On a study shortcut menu, hover over **Exam**, and then select **Reset Study**.
3. In the confirmation dialog, select **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, select the **ALL STUDIES** tab.
2. On a study shortcut menu, hover over **Exam**, and then select **Delete Study**.
3. In the confirmation dialog, select **YES**.
4. In the **Delete Reason** dialog, select a reason and then select **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, select the **ALL STUDIES** tab.
2. On a study shortcut menu, hover over **Send Report** > **Download**, and then select 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: Configure critical findings. See "Configure reason codes" in Configure your company.

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

Flag a study

On the worklist, you can add one or more flags to a study for 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, select the **ALL STUDIES** tab.
2. On a study shortcut menu, hover over **Actions**, hover over **Flag**, and then select a flag.

Copy the API URL

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

1. On the worklist, select the **ALL STUDIES** tab.
2. On a study shortcut menu, hover over **Actions**, and then select **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, select the **ALL STUDIES** tab.
2. On the shortcut menu of a study that contains images, hover over **Images** and then select **Reset Stack**.
3. In the confirmation dialog, select **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, select the **ALL STUDIES** tab.

2. To lock a study, on the study shortcut menu, hover over **Exam** > **Lock Study**.
3. To unlock a locked study, on the study shortcut menu, hover over **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.

See also:
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.
Prerequisite: Configure priorities. See "Configure settings" under Configure your company.

1. On the worklist, select the **ALL STUDIES** tab.
2. On the study shortcut menu, hover over **Priority**, and then select a priority.

Change the study status

You can assign or change the status (such as Approved or Transcribed) of a study in the worklist.
Prerequisite: Configure study statuses. See Configure study flow.

1. On the worklist, select the **ALL STUDIES** tab.
2. On the study shortcut menu, hover over **Change Status**, and then select a status.

Change the urgency (Stat level) 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, select the **ALL STUDIES** tab.
2. On the study shortcut menu, hover over **Stat**, and then select a stat level.

Send a study

You can send a DICOM study to PACS or another destination. You can include any approved reports in the study, but note that the report status (such as Approved or Transcribed) is not sent. To send an approved report with its status, send as XML via Opal.
Prerequisite: Configure send 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, select **DICOM Send**.
3. In the **Send Study** dialog, to filter the list of available AEs, type at least one character in the filter box and then select **Enter**.
4. In the **Priority** dropdown list, select a priority.
5. Do one of the following.
   - Select destinations in the list, and then select **SEND TO SELECTED**.
     Optional: To send any attached approved reports, select the **Include Approved Report** checkbox.
6. Optional. To manage in-process send jobs, see Manage jobs in the transfer and SR queues.

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, select the **ALL STUDIES** tab.
2. On the shortcut menu of a DICOM study, hover over **Send Report** > **Send Report via Opal**.
3. In the **Send Report via Opal** dialog, to filter the list of available AEs, type at least one character in the filter box and then select **Enter**.
4. In the **Priority** dropdown list, select a priority.
5. Select send destinations in the list.
6. Select **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, select 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, hover over **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, select Fax/Email.
4. In the **Send Report** dialog, select the recipient types and individual recipient, and then select the **SEND FAX** and/or **SEND EMAIL** button.
5. Optional. Repeat the previous step to send to additional recipients.

View and export audit log entries

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

1. In the worklist, on the study or order shortcut menu, select **Log**.
2. In the **Activity Log** screen, select a date range for the log entries to view, and then select **RELOAD**.
3. If any entries match the date range, they appear in the list.
4. Optional. To export an entry from the list, select it and then select **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, select the **ALL STUDIES** tab.
2. On the study shortcut menu, select **Attach Files**.
3. Optional. To find a document, do one of the following.
   - To show all available documents, select the Show All Documents checkbox.
   - Use the search bar to find a document by type, source, or other criteria, and then select 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. You can link patients from the worklist "on the fly" by following the procedure in Link patients, or from the patient chart by following the procedures in Use alternate account numbers. Generally, you can use *linking* to merge patients, and use *merging* to move studies, series, and images between patients.

See also:
Use alternate account numbers
Merge or split studies

Link patients

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

Linking an external patient record to an internal one results in deleting the external record.
Prerequisite: Configure alternate account number functionality.

1. On the worklist, on the shortcut menu of a study whose patient you want to link, select **Link Patient**.
2. In the **Link Patient** dialog, in the **Alt Account No** search box, type the exact account number to link to the current account number, and then select **Enter**.
3. In the **Issuer** dropdown list, select the issuer of the PID, and then select **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. Select **SAVE**.

See also:
About linking patients

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, orders, 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 or study** - Scan paper or forms to a DICOM file and attach to all studies in an order or 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, hover over **DICOM Upload** and then select **Upload File**.
2. In the **DICOM Upload** dialog, do the following.
   a. Select a series description.
   b. Select **SELECT FILES**, navigate to a file to upload, and then select **Open**.
   c. Select **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, select **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.

1. In the worklist, on the study shortcut menu of an unread study, select **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 to DICOM format, select the **DICOM SCAN** arrow button, and in the shortcut menu, select **SCAN TO STUDY** (scan, and save to the current study) or **SCAN TO ORDER** (scan, and save to the current order).
    - To scan without scanning options, select the **QUICK SCAN** arrow button, and in the shortcut menu, select **QUICK SCAN TO PATIENT**.
    - To scan with scanning options, select the **QUICK SCAN** arrow button, and in the shortcut menu, select *FULL SCAN TO PATIENT*.
    - To upload the scan to the patient chart, select **UPLOAD**, and then in the second **Patient Document** dialog, do the following.
        - Enter metadata for the document.
        - Select **SELECT FILES**, navigate to and select a file, and then select **Open**.
4. Select **SAVE.**

Scan to an order or study

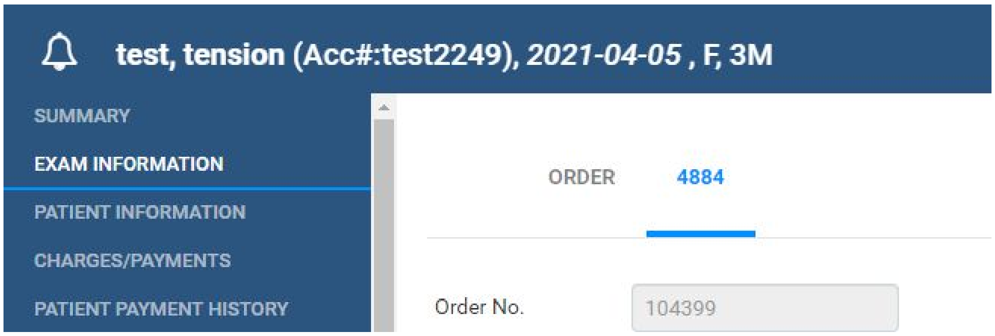
You can scan an image to a DICOM file and attach the file to one or all studies in an order. On the worklist, on a study shortcut menu, do one of the following.

- To scan to the study, hover over **DICOM Upload** and then select **Scan to Study**.
- To scan to all studies in the order, hover over **DICOM Upload** and then select **Scan to Order**.

Edit Study screen

In the Edit Study screen you can view or edit most information about an order or study. To open the Edit Study screen, select 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, selecting the edit button opens the [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, select the edit button of a study.
2. At the top of the **Edit Study** screen, select the alert button.

View a summary of an order

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

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **SUMMARY**.

Edit order information

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

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **EXAM INFORMATION**.
3. Near the top of the screen, select 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	Available with Mobile RAD only. Select the ordering facility or location of the studies. If the patient resides at the ordering

Setting	Description
	facility location, select **Set as Home Address**.
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 for the study.
SDE Study	Select the checkbox 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.
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 select 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 settings are not available to edit, at the bottom of the screen, select **DICOM STUDY**, and then make changes to DICOM settings as needed.
5. To edit or add CPT codes, at the bottom of the screen, select the edit or add button, enter changes, and then select **SAVE.**
6. Select **SAVE.**

Edit study information

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

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **EXAM INFORMATION**.
3. Near the top of the screen, select 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).
G-Code	[USA only]
AUC Audit	[USA only]
Modality Room	The modality room where the study is performed (to change, reschedule).
Originating Facility	Select the Alberta-recognized originating facility.
Originating Location	Select the originating location.
Hospital Admission Date	Select date the patient was admitted for the hospital stay during which the study was performed.
Teeth	[unused]
Nature of Injury	Available for employment related injuries. Select the WCB nature of injury.
Area of Injury	Available for employment related injuries. Select the WCB area of injury.
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.

Setting	Description
	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 settings are not available to edit, at the bottom of the screen, select **DICOM STUDY**, and then make changes to DICOM settings as needed.
5. To edit or add CPT codes, at the bottom of the screen, select the edit or add button, enter changes, and then select **SAVE.**
6. Select **SAVE.**

About changing appointment types

Appointment types contain one or more health service codes or CPTs. If you change a study's appointment type from one that has only one service code/CPT to another than also has only one service code/CPT, Exa PACS/RIS automatically copies any authorization information from the original service code/CPT to the new one. However, if the old and/or new appointment types have multiple service codes/CPTs, Exa PACS/RIS enables you to the copy insurance authorization information from selected service codes/CPTs in the original appointment type to any matching service codes/CPTs in the new one.

Change an authorized appointment

The following feature is not available on all installations. To change an appointment type:

1. On the worklist, select the edit button of a study that has an appointment type with multiple health service codes/CPTs, one or more of which are authorized.
2. On the **Edit Study** screen, select **EXAM INFORMATION**, and then select a study tab.
3. In the **Appointment Type** dropdown list, select a different appointment type.
4. In the **Change Appointment Type** dialog, to copy authorization information, select **YES**.
5. In the **Authorization** screen, select the **COPY** button of any service codes/CPTs whose authorization information you want to copy.
6. Select **SAVE**.

Edit basic patient demographics

The Edit Study screen gives you convenient access to some patient demographics in the patient chart.

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

See also:

Create and modify a patient chart

Add or edit a patient’s portal account

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

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

See also:
Work with Patient Portal

Reset a patient portal password

You can send a link to a patient, or the patient’s representative, that enables them to reset their patient portal account password. This reset feature is only available if the email address has been verified, and the account is unlocked.

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **PATIENT INFORMATION**.
3. At the top of the **Patient Information** area, select **PORTAL CREDENTIALS**.
4. In the **Create Portal Account** dialog, under **Patient Account** or **Representative Account**, select **RESET**.

See also:
Work with Patient Portal

View and print a patient statement from the claim inquiry

You can view and print a patient statement from the claim inquiry.

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

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 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, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **PATIENT INFORMATION**.
3. At the top of the **Patient Information** area, select **SCAN LICENSE**.
4. When the **Scan License** dialog appears, scan the driver’s license.
   Result: Relevant information appears in fields.

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.

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

See also:

Use Patient Kiosk as a 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, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **PATIENT INFORMATION**.
3. At the top of the **Patient Information** area, select **EXPORT CCD**.
4. In the **Export CCD** dialog, select type and encryption functions.
5. Select **PROCESS PATIENT INFO**, and then select **DOWNLOAD**.
6. To send the zipped file, select **SEND** and follow the on-screen instructions.

Enter a new charge

You can modify charges from the Edit Study screen.

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **CHARGES/PAYMENTS**.
3. Select **NEW CHARGE**, and then select a service code and service description.
4. Optional. Select **Verify**.
5. Select **SAVE.**

See also:

Enter a claim for a study

Enter payments and print receipts

You can enter payments, print receipts, and create an invoice for the balance due from the Edit Study screen.

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

See also:

Record a payment

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, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **PATIENT PAYMENT HISTORY**.
3. Select a payment for which to print a receipt, and then select **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, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **INSURANCE PROFILE**.
3. In the right pane, do one of the following:
   a. Select **ADD** to add a profile.
   b. Double-click an existing profile to edit.
4. Enter the following settings.

Setting	Description
Insurance Details	
Set As Default[3]	Select to set the current policy as the default policy. Useful when the patient has multiple policies at the same level.
Level	Select whether the insurance is the patient's primary, secondary, or tertiary policy.
Inactive	Select to inactivate the policy while retaining its information. The Valid To Date is automatically set to the current date.
Existing Insurance[1]	To edit a previously entered policy, select it in the dropdown list.
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.
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.
Valid From/To Date	Select the period during which the current policy is effective.
Eligibility & Estimation	
Benefit On Date[2]	Select the date on which the policy becomes effective.
Verify[2]	Select to verify eligibility. Available when editing a previously entered policy.

Setting	Description
Contact Information	
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.
Country	Select the country 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.

Available:
1. When adding from Edit Study; 2 = When editing from Edit Study; 3 = On the Patient chart

4. Select **SAVE.**

See also:
About active and inactive insurance

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 following procedure.

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

See also:
Manually verify or clear eligibility of orders

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, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **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, select **QUICK SCAN**.
6. To scan with scanning options, select the **QUICK SCAN** arrow button, and in the shortcut menu, select a scan type.
7. To upload the scan to RIS, select **UPLOAD**, or select the arrow button for a patient level document, and then in the second **Patient Document** dialog, do the following.
   - Enter metadata for the document.
   - Select **SELECT FILES**, browse for and select a file, and then select **Open**.
8. Select **SAVE.**

View approved reports

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **APPROVED REPORTS** to open a window and display the report.
   Result: If an approved report is available, it opens (may take time).

Open the transcription screen

Use this procedure to open the transcription multi-panel from the Edit Study screen.

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

See also:
Dictation and transcription with Exa Trans2
Dictation and transcription with Exa Trans and Dragon
Dictation and transcription with Exa Trans and nVoq

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, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **OTHER PHYSICIANS**.
3. Optional. To add a physician, in the **Select Other Physician** dropdown list, select a physician.
4. Optional. To remove a physician, select the trash button.

Enter notes and reasons 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.

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

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **NOTES**.
3. Select the **PATIENT NOTES**, **STUDY NOTES**, or **SCHEDULE NOTES** sub-tab.
4. Select **ADD**, type notes, and then select **SAVE.**
5. Select the **REASON FOR STUDY** tab.
6. Type reasons in the box, and then select **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 update the call log:
Prerequisite: Add call categories (see "Configure app settings" in Configure your company),

1. In the worklist, select the edit button of a DICOM study.
2. In the **Edit Study** screen, on the left pane, select **NOTES**.

3. On the **CALL LOG** sub-tab, select **ADD**.
4. In the **Call Category** dropdown list, select a call category.
5. In the **Call Note** box, type notes, and then select **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. This information automatically appears on claims for this study.

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **ADDITIONAL INFORMATION**.
3. Enter the information as needed and then select **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, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **PATIENT ALERTS**.
3. Select or clear the checkboxes 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 select the plus button.
5. Select **SAVE.**

View problems

You can view problems associated with the study.

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **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, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **STUDIES**.
3. Optional. If a prior study includes reports, select the reports button on the study row to open the reports.
4. Optional. To add a new study, select **NEW STUDY** and then see Set up a patient.

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.

Prerequisite: Create a custom form.

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **CUSTOM FORMS**.
3. In the **Select Custom Forms** dropdown list, select a form to add it to the forms table.

4. Select the form button in the table to open it, edit it as necessary, and then select **SAVE.**
5. Optional. To add an electronic signature, select **SIGNATURE**, enter signature information, sign by drawing with the mouse, and then select **SAVE.**
   Note: To make electronic signatures available, add a signature merge field when setting up the form.
6. Optional: To print the form, select **PRINT**.
7. Optional: To fax the form, select **FAX**, select the recipient physician, enter optional information under **Other**, and then select **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.
Prerequisite: Create a study form.

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

See also:
Draw on a study form image

Draw on a study form image

While filling out a form, you can draw basic shapes on any images included in the form.
Prerequisite: Create a study form

1. In the **Edit study** screen, select **STUDY FORMS**, and then open a study form.
2. Hover over an image on the form to display the drawing toolbar.

1 2 3 4 5 6 7

3. Do any of the following:
   - Select **Color Picker** (7) and then select a color to apply to items that you draw.
   - Select **Rectangle** (2), **Ellipse** (3), and then drag on the image to place the shape.
   - Select **X-Stamp** (4), and then click to place the stamp.
   - To edit a shape, select **Select** (5), select the shape, and then drag to move the shape, or drag the shape's handles to resize.
   - To delete selected shapes or stamps, select them and then select **Delete** (6).
   - To delete all shapes and stamps, select **Clear** (1).

See also:
Add a study form to a patient record

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, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **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. Select **SAVE.**

Refer a patient

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

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

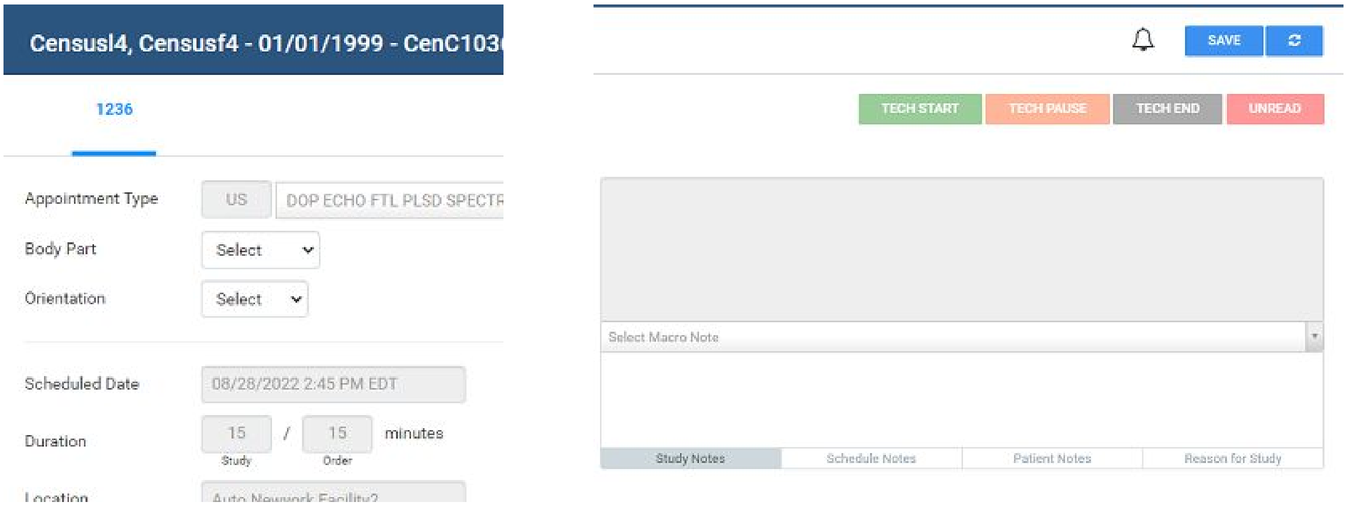
View activity logs

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

1. In the worklist, select the edit button of a study.
2. In the **Edit Study** screen, on the left pane, select **ACTIVITY LOG**.
3. Change the range of dates to filter the activity that you want to view.
4. To view details of an entry, double-click the entry.
5. Optional. To export the longs, select **EXPORT TO EXCEL**.

Exam screen for technologists

Users signing in with a technologist user account see a technologist-specific version of the Edit Study screen that helps them work more efficiently. To open the screen, select the edit button in a worklist study row.



Exam screen for technologists: top left (left) and top right (right)

See also:
[Configure a technologist](#)
[Use the exam screen for technologists](#)

Use the exam screen for technologists

To use the exam screen for technologists (the *Technologist screen*):
Prerequisites: [Configure a technologist](#).

1. Sign in to Exa PACS/RIS as a technologist or a user linked to a technologist.
2. Select the edit button in a worklist study row.
   Result: The Technologist screen opens.
3. Near the upper-left part of the screen, select a study tab (an accession number).
4. Proceed with technologist workflow, using the settings and tools described in the following table.

Setting	Description
	View patient alerts.
Appointment Type	If the original appointment type was incorrect or otherwise changed after scheduling, you can select a new one. **Note**: It may be necessary to authorize all or parts of any new appointment type you select.
[Other settings]	Select as needed.
TECH START/END	Select upon starting and ending the exam. Exam duration statistics are recorded based on the times these buttons are selected, and are used in reporting.

Setting	Description
TECH PAUSE	Select when an exam is interrupted, such as by a difficult patient.
UNREAD	Select to reset the study's status to Unread.
Notes (Study, Schedule, Patient, Reason)	Select a category of note, and then type notes. If macro notes were configured (see Configure macro notes), you can select them from the dropdown list.
ABORT	Select to abort the exam, such as in an emergency.

5. Select **SAVE**.
6. Optional. In the lower-right part of the screen, select one or more of the following.

Setting	Description
Documents	Select to view or add documents to the study or order. See Scan to a patient.
Studies	Select to view a list of prior studies for the current study. Opens the STUDIES tab of the Edit Study screen.
Study Forms	Select to add, edit, or delete study forms from the study. Opens the STUDY FORMS tab of the Edit Study screen.
Add Charges	Add new charges to an exam (see Add charges and NDCs in the exam screen for technologists).

7. Select **SAVE**.

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, and then select **ADD CHARGE**.
2. In the **Add Additional Charges** dialog, select **ADD CHARGE**.
3. In the **CPT Code** column, select the service code for the additional charge.
   Note: Alternatively, you can select the service description.
4. Optional. In the **NDC** column, select 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.

Setting	Description
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. Select **SAVE**.

See also:
Use the exam screen for technologists

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.

See also:
Dictation and transcription with Exa Trans and Dragon
Dictation and transcription with Exa Trans and nVoq

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 these steps:

1. On the worklist, select the settings button, and then in the button shortcut menu, select **User Settings**.
2. On the right side of the screen, under **Voice recognition**, select **Dictation**.
3. Select **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. Select a template from the dropdown list, or use a voice macro to open it.
3. On the dictation toolbar, select the record button, and then dictate your findings.
   Note: If needed, you can select pause during dictation.
4. When finished, select the stop button.
5. To review your dictation, rewind the recording and then select the play button.
   Note: You can record over parts of your dictation that you want to change.
6. When you are satisfied with the results, select the upload button to add your dictation to the study.
   Note: Skip this step if you selected Auto Upload Dictation on Close.

See also:
Add a transcription template
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 select its multi-panel transcription button.
2. In the Exa Trans2 multi-panel, on the toolbar, select 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, select the multi-panel button.
2. In the **Transcription editor** panel, review the transcription, make any needed changes, and then select **Save**.
3. Select **Approve** or **Approve & Next**.
4. In the **Providers** dialog, select the approving provider and select **Approve**.

Enter notes in Exa Trans2

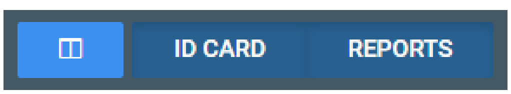
You can add study notes and reasons for study in the Notes panel of Exa Trans2.

1. On the worklist, in the relevant study row, select the multi-panel button.
2. In the multi-panel, open the **Notes** panel.
3. In the **Notes** panel, select 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 select **SAVE**.

Manage documents in Exa Trans2

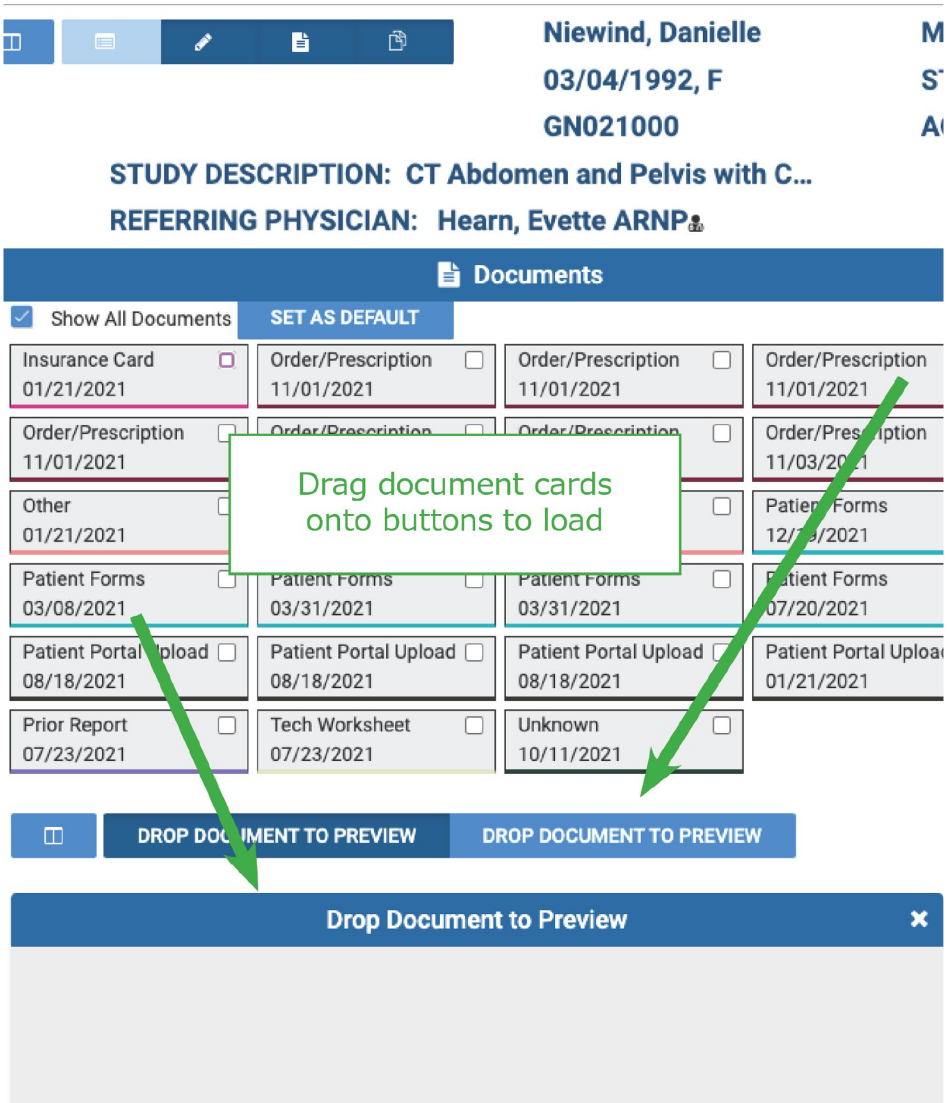
You can view all documents attached to a study in the Documents panel of Exa Trans2. The Documents panel displays up to two documents at once, and you can select which documents to display.

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

Dictation and transcription with Exa Trans and Dragon

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. If your implementation of Exa PACS/RIS offers Dragon, the nVoq feature is not available. To use the features of the Exa Panel for transcription related tasks, see Dictation and transcription with Exa Trans2.

Turn on Exa Trans and Dragon

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

Prerequisite: Install Exa Trans.

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

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

Edit and approve transcriptions

You can edit and approve saved transcriptions.

Prerequisite: Turn on Exa Trans and Dragon.

1. In the worklist, select the transcription button of a dictated study.
2. In the editing screen, review the transcription, make any needed changes, and then select **Save**.
3. Select **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 and Dragon.

1. In the worklist, select 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, select **Add Addendum**.
4. Type new text, and then select **Addendum Save**.
5. If not using Dragon, select **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.
User selects 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

Action/Condition	Effect
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.

Dictation and transcription with Exa Trans and nVoq

With Exa Trans, you can dictate and transcribe simultaneously with nVoq voice recognition. One advantage of nVoq is that it is a "zero footprint" solution for higher performance. Alternatively, you can dictate findings in Exa Dictation and transcribe them manually. If your implementation of Exa PACS/RIS offers nVoq, the Dragon feature is not available. Before using nVoq with Exa Trans, you must:

- Obtain account credentials from the nVoq website, or create an account.
- Configure the account in Exa PACS/RIS.

See also:
Create an nVoq user account
Configure an nVoq user account

Turn on Exa Trans and nVoq

You must turn on Exa Trans and nVoq before using them.
Prerequisite: Install Exa Trans.

1. On the worklist, select the settings button, and then in the button shortcut menu, select **User Settings**.
2. On the right side, under **Voice recognition**, select **nVoq (Exa Trans)**.
3. Select **SAVE.**
4. Sign out of Exa PACS/RIS, and then sign in again.

Create an nVoq user account

To create an nVoq user account from within Exa Trans:
Prerequisite: Turn on Exa Trans and nVoq.

1. In the worklist, find an unread study and select its transcription button.
2. In **Exa Trans**, on the **nVoq Options** tab, select **Account**.
3. In the **Account** dialog, on the right pane, type account information, and then select **Save**.
4. Configure your account in Exa PACS/RIS.

See also:
Configure an nVoq user account

Configure substitutions

You can add substitutions (voice macros) to nVoq.
Prerequisite: Turn on Exa Trans and nVoq.

1. In the worklist, find an unread study and select its transcription button.
2. In **Exa Trans**, on the **nVoq Options** tab, select **Add New Substitution**.
3. Optional. To view previously saved substitutions, select **Substitution List**.
4. In the **New Substitution** dialog, enter the following settings.

Setting	Description
Level	Select **Account** to make the substitution available only to you. Select **Organization** to make the substitution available to all.
Spoken	Type the voice macro command (the word or phrase spoken to activate the substitution).
Description	Type a description of the substitution.

Setting	Description
Written	Type the text that nVoq substitutes (inserts) when the voice macro command is spoken.

5. Select **Save**.

Configure vocabulary

You can add words and phases to nVoq's vocabulary for better recognition.
Prerequisite: Turn on Exa Trans and nVoq.

1. In the worklist, find an unread study and select its transcription button.
2. In **Exa Trans**, on the **nVoq Options** tab, select **Vocabulary**.
3. In the **Vocabulary** screen, select one of the following:
   - **Account** - The current vocabulary is available only to the current user.
   - **Organization** - The current vocabulary is available to all users in the facility.
4. In the **Written** box, type a word or phrase.
5. In the **Sounds Like** box, type pronunciation.
   Note: Usually leave this blank. Try adding pronunciation if nVoq frequently fails to recognize the word or phrase.
6. Select **Save**.

Dictate and transcribe a study

With the integrated nVoq application, you can use Exa Trans to dictate and transcribe findings simultaneously. If you pause dictation, during the next 30 seconds you can use voice commands or resume dictation without losing the connection to nVoq. After the 30 seconds, dictation "stops," and the connection closes.
Prerequisite: Turn on Exa Trans and nVoq.

1. In the worklist, find an unread study and select its transcription button.
2. In the **Exa Trans** window, in the **Templates** dropdown list, select a template.
3. Press the button on the microphone, and then begin dictating. Press the button again to pause/stop.
   Note: You can also select the dictation button in the bottom-right corner of the screen to start recording, and to pause.
4. Optional. To view the hypothesis during dictation, select the **Show Hypothesis** link.
5. Select **Save**.

Use voice commands

When using nVoq in Exa Trans, in addition to substitutions, you can use the voice commands described in the following table.

Command	Description
[voice macro command]	Runs the pre-configured voice macro to open a transcription template.
Select [word or phrase]	Selects words and phrases. **Example**: Say, “Select cardiac arrest” to select the word “cardiac” followed by the word “arrest.”

Command	Description
Select [word] through [word]	Selects a range of words **Example**: Say, "Select food through department" to select the phrase "food and beverage department."
Next variable Next field	Selects the next set of brackets within the report and their contents.
Previous variable Previous field	Selects the previous set of brackets within the report and their contents.
Scratch that Delete that	If text is currently selected, deletes the selection. If text is not currently selected, deletes the previously transcribed phrase. Repeat the command to delete the 10 most recently entered instances of stable text.
Undo	Undoes the 10 most recent user actions, including dictation of text or use of other voice commands (same as the Windows Undo command).

Edit and approve transcriptions

You can edit and approve saved transcriptions.
Prerequisite: Turn on Exa Trans and nVoq.

1. In the worklist, select the transcription button of a dictated study.
2. In the editing screen, review the transcription, make any needed changes, and then select **Save**.
3. Select **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 and nVoq.

1. In the worklist, select the transcription button of an approved study.
2. To add a *dictation* addendum, repeat the steps in "Dictate and transcribe a study."
   Exa PACS/RIS reverts the status of the dictation from Approved to Dictated.
3. To add a *transcription* addendum, select **Add Addendum**.
4. Type new text, and then select **Addendum Save**.
5. Select **Addendum Submit for Review**.
   Exa PACS/RIS reverts the status of the dictation from Approved to Transcribed.

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. The topics in this section describe how to resolve conflicts.

See also:
Understanding receiver rules

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 (see Configure other user settings). Optional: To view only conflicts in the QC tab, select **Settings** > **User Settings**, and then clear the **Show Completed in Pending List** checkbox.

1. In the worklist, select the **QC** tab.
2. On the search bar, select inside the **STATUS** box.
3. On the shortcut menu, select a status (such as “Conflicts”) and select **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, select the **QC** tab.
2. Find a study whose status is **Conflicts**, and in its shortcut menu, select **Reconcile**.
3. In the **Reconcile** dialog, under **Suggestions** or **RIS Orders**, find an order in the list that matches the details listed under **Current Study**, and then select 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, select **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, select the **QC** tab.
2. Find a study whose status is Conflicts, and select its edit button.
3. In the **Manual Edit** dialog, edit demographics as necessary and then select **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, select 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, select **Reconciliation**.
4. In the **Reconciliation** dialog, under **RIS Orders**, find the order you just created and select 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, select the **QC** tab, and then find a study that you want to move.
2. In the study's shortcut menu, select **Move to All Studies**.

Work with the Exa PACS/RIS viewer

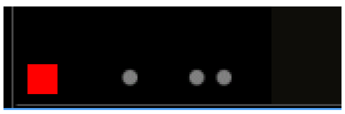
Standard viewing tasks

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 Exa PACS/RIS viewer, select the button of a study.
- To open in the Opal viewer, select the button of a study.
- 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 usual manner, and use the following.

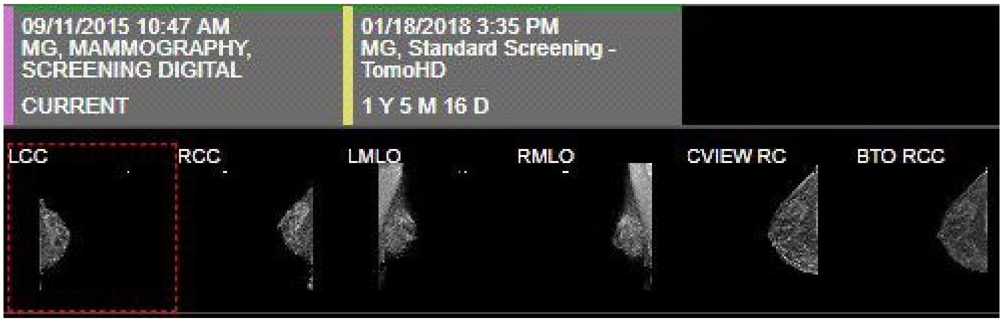
- Select a finding to select a value for the 2D or synthesized view.
  Result: The screen changes to a 1 x 2 temporary view with the 2D image in one cell and the BTO series scrolled to the slice with the finding in the other. For example, if you select the RCC finding, the BTO series opens at the RCC slice.
- 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 also:
Configure mammography (Enable CAD Findings on All BTO Images)
About viewing CAD findings

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:

- Hover over a study to display its details.
- Select a study to open the thumbnail bar.
- Double-click a thumbnail to open its image or series (for example, the right box in the top row of the figure).
- If a report is included, select 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 select **Send Image/Annotation**.
3. In the Send Study dialog, in the bottom pane, select one or more AEs
4. Select **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: Add the DICOM Print command to the shortcut menu (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 select **DICOM Print**.
2. In the **DICOM Print** dialog, in the **Printer** dropdown 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	Select to print the selected image, selected series, current page of images, or all images.

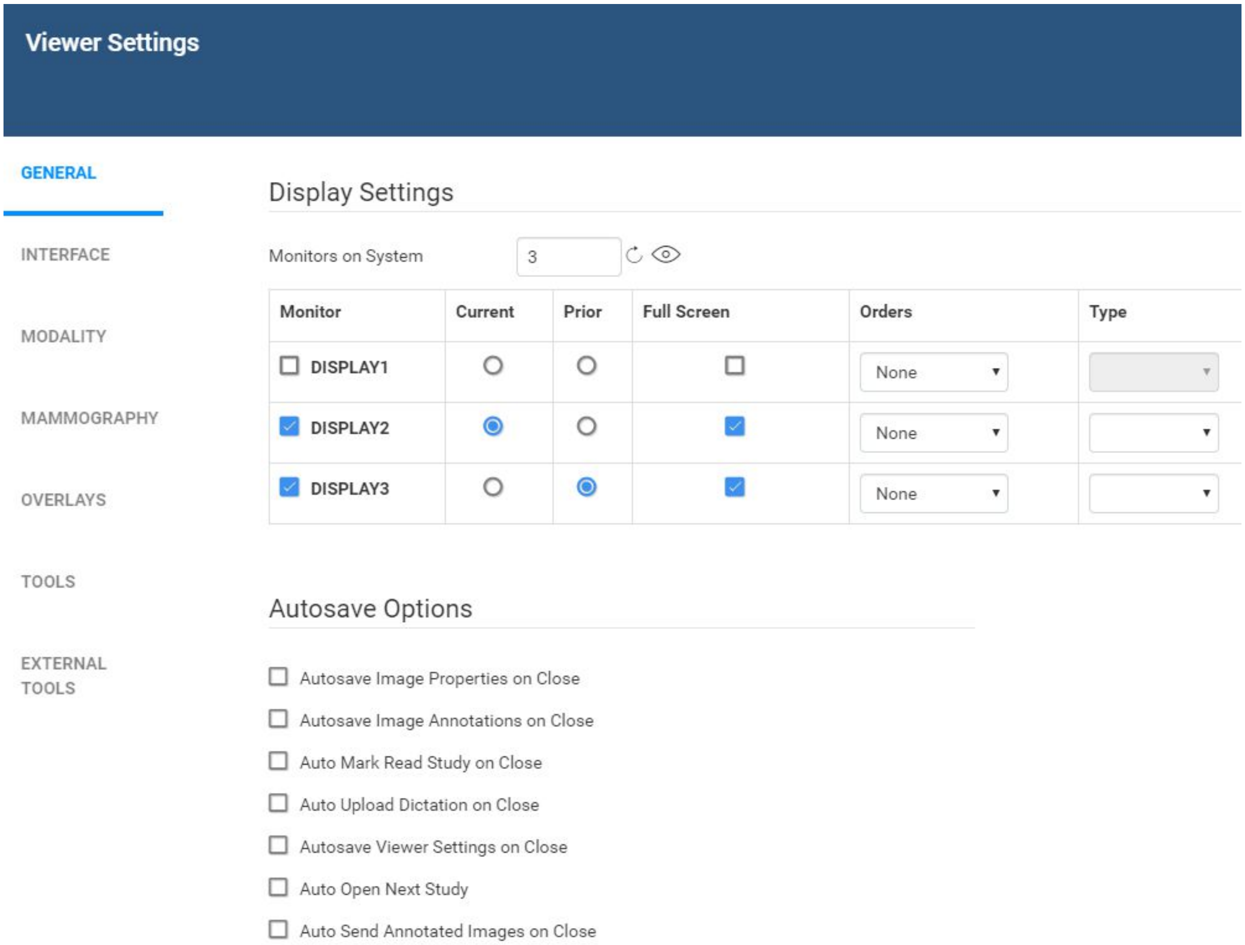
Setting	Description
All Images	
Prev / Next	Select to move through pages of the print preview.
Printer	Select a printer (selected earlier in this procedure).
Configuration	Select a printer profile.

4. Select **DICOM Print**.

Configure the viewer

In the Viewer Settings dialog, 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, see other topics in this section. There are two ways to open the Viewer Settings dialog.

- In the worklist, on the upper toolbar, select the settings button, and then in the button shortcut menu, select **Viewer Settings**.
- In the Exa PACS/RIS viewer, in the upper toolbar, select 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: <u>Add the Chrome extension</u>.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **GENERAL**.
3. Under **Display Settings**, in the **Monitors on System** box, select the update button to update the monitor count (or enter manually), and then select the identify button.
4. In the table of monitors, enter the settings in the following table.

   Note: At any time you can select 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** dropdown list for **DISPLAY2**, the Document section of the patient chart will appear in DISPLAY2 when you select 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. Select **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, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **GENERAL**.
3. Under **Autosave Options**, enter the settings in the following table.

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	When the current study is closed, automatically opens the next study in the worklist that is not partially deleted.

Setting	Description
Auto Send Annotated Images on Close	Automatically sends images if they include annotations when the current study is closed.

4. Select **SAVE.**

Configure the toolbar

You can configure the appearance and other properties of the viewer toolbar.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **INTERFACE**.
3. Under **Toolbar**, enter the settings in the following table.
   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. **Auto** - Adjusts the speed automatically based on the number of images in the series. **Dflt** - The default sensitivity after upgrading to version 1.4.32_P1. This is the same sensitivity as the "0/Auto" sensitivity used in version 1.4.29. **Low/High** - Spans slowly or quickly.
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. If you select **Mirror**, the thumbnail bar in the left monitor appears on the left side of the screen, and the thumbnail bar in the right monitor appears on the right side of the screen (available when the modified toolbar is not available).
Header Menu	Sets the position of the toolbar and other header items.
DM Toolbar	Sets the position of the DM toolbar.

4. Select **SAVE.**

See also:
Configure other interface settings

Configure calipers

You can configure the number and placement of calipers.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **INTERFACE**.

3. Under **Caliper Position**, select checkboxes for each caliper that you want to display, and then select **SAVE.**

Configure other interface settings

You can configure miscellaneous viewer toolbar and other settings.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **INTERFACE**.
3. Under **Other Toolbar**, enter the settings in the following table.

Setting	Description
Ask on Close	Prompts you to specify which items to save before 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 hover over a prior to display series/image thumbnails, and select 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 dropdown list in the **Viewer Settings** dialog, 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.

Setting	Description
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 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.

Setting	Description
Show Span Overlay	Shows a span sensitivity adjustment slider on images.

4. Select **SAVE.**

See also:
[Configure the toolbar](#)

Configure annotation tool functionality

You can configure annotation tool functionality.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **INTERFACE**.
3. Under **Annotation**, enter the settings in the following table.

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 selecting.
ROI Show Size	Displays the size of the selected ROI.
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. Select **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, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **INTERFACE**.
3. Under **Colors**, to add an annotation color, select inside a color or grayscale box and then use the color picker to select a color.

   Anno Color 1-5: Annotations appear in these colors by default.
   Anno Color Edit: Annotations change to this color when you edit them.
   Anno Color Hover: Annotations change to this color when you hover over them.

4. Select **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, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **INTERFACE**.
3. Under **Miscellaneous**, enter the settings in the following table.

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.
Scale Annotation Point By	Sets the line thickness for annotations.

4. Select **SAVE.**

Configure recording

You can configure audio recording options for Exa Dictation.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **INTERFACE SETTINGS**.
3. Under **Record Control**, enter the settings in the following table.

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 selecting play or record by the specified amount of time.

4. Select **SAVE.**

Show or hide tool buttons

You can hide certain tool buttons.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **INTERFACE**.
3. Under **Tool Buttons**, select the checkboxes of the items that you want to hide.
4. Select **SAVE.**

About ROI and SUV values and units

Exa PACS/RIS can calculate selected types of SUV values and display them in selected units. When using these functions, consider the following.

- DICOM data from Philips – To calculate SUV values based on DICOM data from a Philips modality, if the data uses CNTS units, Exa PACS/RIS converts pixel values to BQML by using Philips private tags Scaling Factor [7053,xx00] and Activity Concentration Factor [7053,xx09]. However, if those tags are missing, the CNTS units are retained regardless of the SUV type you configure.
- If data required for calculations is not found in the DICOM source file, Exa PACS/RIS displays N/A in place of measurements.
- If ROI Selection Weighting is set to Exclusive, largest-valued or smallest-valued pixels falling partially outside of an ROI are excluded from calculations.

See also:
Configure fusion, ROI, and SUV options

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, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **INTERFACE**.
3. Under **Fusion**, and under **ROI & SUV**, enter the settings in the following table.

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.
	Show Number of Pixels in ROI Selection	Select to show the number of pixels selected when annotating an ROI or selecting with the freehand tool.
	Show Number of Slices in ROI Selection	Select to show the number of slices selected when annotating an ROI or selecting with the freehand tool.
	ROI Selection Weighting	Select which pixels are included in an ROI. **Weighted**: Include pixels touching or within the ROI border, and assign a value based

Group	Setting	Description
		on the percentage of the pixel lying within the ROI. **Inclusive**: Include pixels touching or within the ROI border, and use the full pixel value. **Exclusive**: Include only pixels completely within the ROI border, and use the full pixel value.
	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.
	Use Standard SUV Type Units (g/ml, cm^2/ml)	Select to display SUV values using standard units for the SUV type. Clear to use the values stored in the DICOM file.
	Default SUV Type	Select the type of SUV calculation to perform.

4. Select **SAVE**.

See also:
[About ROI and SUV values and units]

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, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **MODALITY**.
3. In the list of modalities, select a modality to configure.
4. Enter the settings in the following table.

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.

Section	Setting	Description
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	Select 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.
	Assure All Viewed	Displays a check mark in thumbnails of images that were opened, and warns the user when closing before all images are 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 DM Wrap	Enables moving from the final step of a DM directly to the first step, and back again.
	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.

Section	Setting	Description
	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.
	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.

Section	Setting	Description
	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 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.

Section	Setting	Description
	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	Opens 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.
	Differing Echo Time	Splits by echo time.
	Differing Series Number	Splits by series number.
	Differing Series Time	Splits by series time.
	Differing Acquisition Number	Splits by acquisition number to create stacks for separate acquisitions/scans.
	Differing Diffusion Value	Splits images within similar series UID by b-value (0018,9087 MR Diffusion Value) into separate series.
	Differing Trigger Time	Splits by trigger time (0018,1060).
	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.

Section	Setting	Description
	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. Select **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 checkbox in the Modality area of the Viewer Settings dialog, 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.

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, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **MAMMOGRAPHY**.
3. Enter the settings in the following table.

Section	Setting	Description
Mammography	Use 2+ Year-Old Priors	Makes available the display of priors that are 2 years old or more.

Section	Setting	Description
	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 moving 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 moving through DMs in the DM toolbar by using the 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.
	Group DM Preview by Prior	Saves space on the prior bar by stacking DMs with the same prior logic. You can hover over 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	Makes it possible to move through prior mammo images within a hanging protocol without needing a specific DM. Select Asc or Desc to move by age of prior.
	Enable SkinLine	Maximizes breast anatomy based on the skin line without degrading image quality.

Section	Setting	Description
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. Select **SAVE.**

Configure overlays

You can configure the appearance and contents of overlays.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **OVERLAYS**.
3. Enter the settings in the following table.

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	Click inside the box and then: • Select a property from the list, or • Type a DICOM tag (e.g. `0020,0010`)
	Prefix	If you typed a DICOM tag in the Field box, type a tag prefix.
	Mask	Optional. Type attributes that describe mask operations for a multi-frame image (see the DICOM standard).
Bottom Overlay	FOV/MAG/W/L	Displays the field of view, magnification, and W/L for each series in the bottom corner.

4. Select **ADD**
   Result: The tag appears at the bottom of the list.
5. Optional. Drag the tag to a new position in the list.
6. Select **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.

Note: Not all toolbar tools can be removed.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **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 checkboxes of the tools that you want to add or remove.
6. Select **SAVE.**

See also:
Viewer toolbar tools

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, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **TOOLS**.
3. Under **Toolbar**, select the modality whose shortcut menu you want to customize.
4. In the list, select **CONTEXT MENU**.
5. Under **Tools**, select or clear the checkboxes for tools that you want to add or remove.
6. Select **SAVE.**

Assign toolbar keyboard shortcuts

You can assign keyboard shortcuts ("hot keys") to tools, and customize shortcuts by modality.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **TOOLS**.
3. Under **Toolbar**, select the modality for which you want to assign shortcuts.
4. In the list, select **KEYBOARD SHORTCUTS**.
5. Under **Tools**, select the checkboxes of the tools to which you want to assign shortcuts.
6. In the **Shortcut** box, type the keyboard shortcut. The shortcut can be one of the following, either by itself or preceded by the **Ctrl** key:
   - Alphanumeric character (**A–Z**, **a–z**, **0–9**)
   - Arrow key (**Up**, **Down**, **Left**, or **Right**)
   - Basic math operator (**+**, **-**, *****, **/**)
7. Select **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.

Prerequisites: Install Exa Launch, Add a trusted IP or URL.

1. In the Exa PACS/RIS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **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** checkbox.
4. In the row's **Orders** dropdown list, select the application (such as PS360 or MModal).
5. In the left pane, select **INTERFACE**.
6. Under **Other Toolbar**, in the **Auto Open Orders** group, select the application (such as **PS360** or **MModal**).
7. In the left pane, select **TOOLS**.
8. Under **Toolbar**, select **MAIN**, and then in the right pane, select the **External Tools** checkbox.
9. In the left pane, select **EXTERNAL TOOLS**.
10. Enter the settings in the following table, and then select **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 select the toolbar button (such as the path to the executable, or a URL).
Arguments	Type arguments to pass to the command at runtime. Exa PACS/RIS supports the following arguments: {{account_no}} (patient ID) {{id}} (study ID) {{accession_no}} {{facility_id}} {{username}} {{user_id}} {{patientName}} {{patientDOB}} {{patientSex}} {{studyDescription}} {{series_uid}} {{image_uid}}
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).

See also:
[Configure opening of PenRad]
[Configure opening of OrthoView]

Configure opening of PenRad

You can configure Exa PACS/RIS to be able to open mammography and ultrasound breast studies in PenRad by selecting 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, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **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** checkbox.

4. In the row's **Orders** dropdown list, select **PenRad**.
5. In the left pane, select **TOOLS**.
6. Under **Toolbar**, select **MAIN**, and then in the right pane, select the **External Tools** checkbox.
7. In the left pane, select **EXTERNAL TOOLS**.
8. Enter the following settings, and then select **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.

See also:
Configure opening of a third-party program

Configure opening of OrthoView

You can configure Exa PACS/RIS viewer to open a study in OrthoView by selecting the external app button on a worklist study row.
Prerequisite: Install Exa Tool.

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, select **Setup**.
5. Next to the burger button, select the word in all caps, and then select **User Management**.
6. On the **EXTERNAL APPS** tab, select **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 on the previous line.

{{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. Select **SAVE**.

See also:
Configure opening of a third-party program

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, select the external app button.
2. In the button shortcut menu, select **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, select 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, select 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, select the curve tool.
2. Select 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, select the text tool.
2. In the box, type text and then select **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, select the dot tool.
2. Select 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, select the vertical or horizontal line tool.
2. To add the line, select 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, select the left or right marker tool.
2. To add the marker, select 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, select the angle tool.
2. Select on the image three times to place a vertex and two endpoints.
3. Move the pointer to position the angle measurement, and then select to finish.

Measure a Cobb angle

You can measure a Cobb angle on an image.

1. On the viewer toolbar, select 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 select 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, select the HO angle tool.
2. Select on the image to place a starting point.
3. Select 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, select the radial angle or radial length tool.
2. Select 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, select 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, select 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, select the M compare tool.
2. Select 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, select **Annotations** > **Measures** > **FH Measure**.
2. Select three times on the image to place a vertex and two endpoints.
3. Move the pointer to position the circle measurements, and then select to finish.

Find a center point

You can find the center between two reference points.

1. On the image shortcut menu, select **Annotations** > **Measures** > **Center Point**.
2. Select 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, select the circle tool.
2. Select twice on the image to place two loci.
3. Move the pointer to adjust the circle, and then select 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, select the basic spine label tool.
2. In the button shortcut menu, select a region and starting vertebra.
   Note: Choose “Up” to apply labels in ascending order, or “Down” for descending.
3. Select on the first vertebra to add the first label, and then select 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, select the quick 3D spine label tool.
2. In the button shortcut menu, select a region and starting vertebra.
   Note: Choose “Up” to add labels in ascending order, or “Down” for descending.
3. Select on the first vertebra to add the first label, and then select 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, select the 3D spine label shortcut tool.
2. In the button shortcut menu, select a region and starting vertebra.
   Note: Choose “Up” to add labels in ascending order, or “Down” for descending.
3. Select 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, select the spine label shortcut , 3D spine label shortcut , or 3D quick spine label shortcut tool.
2. In the button shortcut menu, select 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, select the 3D cursor tool.
3. Hover over 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, select **Annotations** > **3D Point**.
2. Select 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, select **Annotations** > **3D Ray**.
2. Select 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, select **Annotations** > **3D ROI**.
2. Select 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, select **Annotations** > **3D Measure**.
2. Select 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, select **Annotations** > **3D Angle**.
2. Select 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, select **Annotations** > **Shutters** > **Shutter Box** or **Shutter Ellipse**.

2. Select 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, select **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, select the AR tool.
2. Select 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 select the tool that created it, or select the edit tool to enter Edit mode. You can select 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, select the save annotations button.
- To delete all annotations, on the toolbar, select the delete all annotations button.
- To delete all annotations for the current series, on the image shortcut menu, select Delete Series Anno.
- To delete all annotations for the current study, on the image shortcut menu, select 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, select the **DiA** button.
3. In the center of each open frame, select 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, select the **SG**, **EF**, or **Both** button to perform annotation and measurement.
5. To save the results, select 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, select the reset viewer button.

Change elements in the viewer

Show or hide overlays

You can turn overlays on or off. Note, PR (GSPS) DICOM objects from Intelerad are supported as overlays.

- On the viewer toolbar, select the overlay button to turn overlays on or off.
- To show a preset DICOM overlay, in the image shortcut menu, select DICOM overlay, and then select an overlay.

Show or hide annotations

You can turn annotations on or off. Note that

1. In the upper-right corner of a frame, right-click the menu icon .
2. In the shortcut menu, select **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, select 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 moves 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, select 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, select **Slab Tools**, and then select 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, select **Recalibrate**.
3. In the dialog, type a new value (mm) for the scale, and then select **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, select **Series Layout**, and then select 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, select **Reorder**, and then select 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, select the auto window/level button.

Adjust the window/level

You can manually adjust the window/level.

- On the viewer toolbar, select 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, select **Presets**, and then select a preset.

Apply CLAHE enhancement

You can apply CLAHE to enhance local contrast.

- On the viewer toolbar, select 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, select the bone enhance button.
2. In the button shortcut menu, select a percentage.

Invert colors

You can invert black and white values to make certain images easier to read.

- On the viewer toolbar, select 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, select **Palettes**.
2. Select 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, select **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 select 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, select the zoom tool and then drag on the image.
- Select 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, select Enter Zoom, and then type a value from .05 to 7.5.
- "Quad zoom": Use 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, select the one to one button.

Display images in their actual size

You can display images in their original size.

- On the viewer toolbar, select 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, select 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, select the magnifying glass tool, and then select and hold over the area to magnify.

Linking images

When two series are open side-by-side in the viewer, *linking* them causes moving through images in a second series when you move 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, select the auto link 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, select the manual link 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, select the context tool.

Reset linked series

You can reset (undo) image linking by selecting the reset linked series 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, select the pan 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 adjust the span sensitivity, see Configure the toolbar.

- To scroll: Hover over the image and rotate the mouse wheel.
- To span: On the image shortcut menu, select **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:

- Select **Transformation** > **Flip Horizontal** or **Flip Vertical**.
- Select **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, select the cine 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, select **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, select **Keyimage**.
   The thumbnail pane shows thumbnails of your key images.
2. Double-click a key image thumbnail.

Open a series image in a 1×1 frame

If a series is open in a layout other than 1 × 1, double-click any image to open it in a 1 × 1 layout.

Jump to a BTO image by SR finding

To quickly open a BTO image that has a specific SR finding:

1. Open the tomosynthesis series that contains the image.
2. On the 2D or synthesized view, select the SR finding of interest.
   Result: The corresponding slice opens. Note the following:
   - The slice that opens is of the same view type (e.g. select a finding on an RCC to open a BTO RCC slice).

- If the BTO series is not displayed within the current layout, the series opens next to the 2D or synthesized view in a 1x2 layout. To restore the original layout, select the backslash (\ ) key.

Triangulate images

You can navigate multiple series at the same time.

1. On the viewer toolbar, open two or more series.
2. Select the Triangulation  button, and then do one or both of the following.
   - Double-click a series to open the corresponding slice in the other series.
   - Move the pointer in one series to move the pointer to the corresponding position in the other series.

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.
Prerequisite: If performing MPR on a fusion study, wait until both series are fully pre-fetched.

1. Open a series, and then double-click an image to view it full screen.
2. Select the arrow on the right side of the MPR button.
3. In the button shortcut menu, select 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.
Prerequisite: If performing MPR on a fusion study, wait until both series are fully pre-fetched.

- Open a series, and then select the 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, select 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, select 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.

Save an MPR series

After you perform MPR, you can save the resultant images and series for later viewing.

1. Perform MPR.
2. Right-click a generated cell, point to Save MPR, and then select **Instance** or **Series**.
3. In the **Create MPR Series/Instance** dialog, type a description, and then click **save**.

   Result: A thumbnail for the saved instance or series appears on the thumbnail bar.

See also:
[Perform simple MPR]
[Perform standard MPR]

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, hover over the top of an image to display the image's top shortcut menu, and then select **PT**.
2. In the PT button shortcut menu, under **PET selection**, select 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, select **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**, select the source study to color.
2. In the PT button shortcut menu, under **Palettes**, select a color.
3. In the PT button shortcut menu, under **Alpha Blending**, select 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, select settings, select **Viewer Settings**, and then in the **Viewer Settings** dialog, on the left pane, select **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 checkboxes.
   - 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** checkbox.
   b. In the **Auto Open Prior Count** dropdown list, select the maximum number of priors to open at once.
5. Select **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.

- **Manually**: In the viewer, select the display manager button, and then in the button shortcut menu, select **Show DM Toolbar**.
- **Automatically**: On the viewer toolbar, select the settings button. Select **MODALITY**, select modalities, select the **Show DM Toolbar** checkbox, and then select **SAVE**.

See also:
Use the DM toolbar

Display images with a DM

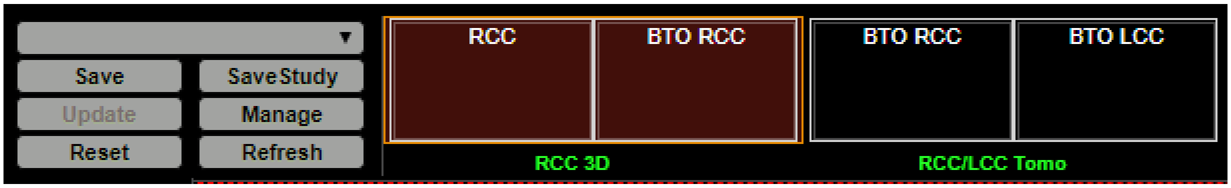
You can select from a list of previously configured DMs to hang the current study. If you show the DM toolbar in the viewer, you can select a DM on the toolbar. If you did not show the DM toolbar:

1. Open a study in the viewer.
2. On the toolbar, select the 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.

- Use the left or right bracket keys ([or]) to move to the next or previous DM step.

Use the DM toolbar

As in the following figure, 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: Selecting this button deletes all settings of the current DM.

- Manage: Opens the DM manager.
- Reset: Select to apply any newly created or edited DMs.
- Refresh: You can also *refresh* DMs to update the list of applicable DMs.
- [DM]: Select 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, select the display manager button.
2. In the button shortcut menu, select **DM Manager**.
3. In the **DM Manager** dialog, 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. Select **SEARCH**.
   DMs matching your search criteria appear in the list at the bottom of the dialog.
5. To open the DM for editing, double-click it, or select 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 Add a DM).
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. Select **EXPORT SELECTED** or **EXPORT ALL**.
   The DMs are added to a single JSON file and downloaded to your computer.
3. Copy the file to the destination system, display the **DM Manager** dialog, select **IMPORT**, and then open the exported JSON file.

Add a DM

To add a DM:

1. On the viewer toolbar, select the display manager DM button.
2. In the button shortcut menu, select **DM Manager**.
3. In the **DM Manager** dialog, select **ADD NEW DM**.
4. In the second **DM Manager** dialog, 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, select **1*1** and select a cell layout for the study-level series/images within the monitor.
6. Optional. Select **1*1** in of the cells, and select 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 checkbox (see About missing cells).

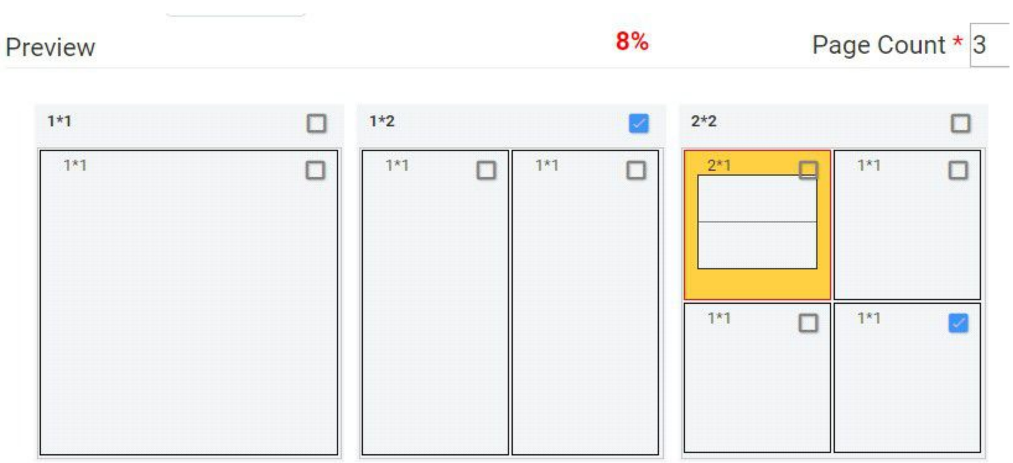


Figure. In this example, 3 pages (monitors) are configured, with 1, 2, and 4 cells added to each page, respectively. On the second page, Allow Missing Cells is selected at the page level, which means that either the left, right, or both cells can be blank. On the third page, the study will hang if images 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 select **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, select **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.
5. In the list on the right side of the dialog, select a relationship of AND or OR.
6. At the top of the dialog, select **SAVE.**

See also:
[Add a general matching rule to a DM]
[Add a prior matching rule to a DM]
[Add a mammo matching rule to a DM]
[Add a mammo rule for breast implant displacement]

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, select **ADD GENERAL RULE**.
   Note: If you created a group and you want the rule to be included in the group, select the button that is inside the group.
4. In the **Matching Tag** dialog, enter the following settings.

DICOM Tag/Field – Select a tag to use as the argument.
Operator – Select an operator.
Matching Value – Type a matching value, and then select the plus sign.

5. Modify the rule until the validation percentage is 100%, or add another rule.
6. Select **SAVE**.
7. In **DM Manager**, select **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, select **ADD MAMMO. RULE**.
   Note: If you created a group and you want the rule to be included in the group, select the button that is inside the group.
4. In the **Mammo Rule** dialog, 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. Select **SAVE**.
7. In **DM Manager**, select **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, select **ADD PRIOR RULE**.
   Note: If you created a group and you want the rule to be applied to the group, select the button that is inside the group.
4. In the **Prior Rule** dialog, 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. Select **SAVE**.

6. In **DM Manager**, select **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 CAD Current MG Only	Select one or more processing functions to apply. Exempts the current cell from the Stack by View and Prior option.
CAD	Select to display CAD values according to the SR CAD settings when the user reaches this step of the hanging protocol.
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. Select **UPDATE**, and then **SAVE**.

See also:
Configure mammography

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, select the **DM** button, and then in the button shortcut menu, select **DM Save**.
3. In the **DM Information** dialog, type a name for the DM and select or clear the **Private** checkbox.
4. Select **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, select **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, select **ADD GROUP**.
2. In the new group, select **ADD GENERAL RULE**.
3. In the **Matching Tag** dialog:
   - In the **DICOM Field/Tag** list, select **Modality**.
   - In the **Operator** list, select **Equal**.
   - In the Matching Value box, type **CR**, select the plus (+) button, and then select **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 select **ADD GENERAL RULE**.
2. In the **Matching Tag** dialog, 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. Select **SAVE**, and then close the DM manager.
5. Select **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**, select the 1*1 cell (not the page header), and select a 3 x 2 series layout.

Add a general rule for all images

1. Select inside 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**, select **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. Select the upper-left cell, and then select **ADD GROUP**.
2. In the new group, select **ADD MAMMO RULE**.
3. In the **Mammo Rule** dialog, add the following rule.
   - **Side** = Right
   - **View** = CC Family
   - **DON'T CARE**
   - **Processing Type** = Processed
   - **Image Index** = ANY
4. Select **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, select **ADD PRIOR RULE**.
3. In the **Prior Rule** dialog, in the **Study Index** list, select **ANY**, and then select **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 select **SAV**E, and **SAVE** to save the DM.
4. Close the DM manager. In the viewer, select **F5** to update and view your DM.

Add a DM group

To keep different sets of hanging protocols for different appointment types and studies, you can combine DMs into groups.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **DICOM**.
3. On the **HANGING PROTOCOLS** tab, under **DM Group**, select the plus button.
4. In the **DM Group** dialog, on the left, type descriptive information for your DM group.
5. Under **Associate group to study by**, do one of the following:
   - Select **APPOINTMENT TYPE**, select one or more appointment types in the list, and then select **SAVE**.
   - Select **STUDY DESCRIPTION**. In the **Study Description** box, type a description, and then select the plus button.
6. Click **SAVE**.

Share DMs with a DM group

To add (share) DMs with a DM group:

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **DICOM**.
3. On the **HANGING PROTOCOLS** tab, find a DM to add to a group.
4. On the right, select the share button.
5. In the **Share** dialog, select the group with which to share the DM, and then select **SHARE**.

Share DM groups with users

By default, DM groups that you create are only available to you. To share a DM groups with other users or user groups:

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **DICOM**.
3. On the **HANGING PROTOCOLS** tab, under **DM Group**, select a DM group to share.
4. On the right, select the edit button.
5. In the **Edit DM Group** dialog, select **SHARE**.
6. In the **Copy** dialog, select users or groups with which to share the DM group, and then select **COPY**.

About DM groups and private DMs

When a DM is created by a member of a DM group, the following apply.

Availability	Instance	Users	Access
Private**	Original	Creator	Read/Write
		All Others	None
	Copy	Shared with users	Read/Write
		Shared with user groups	Read-Only
	Copy of shared copy	Shared with users or user groups	Read/Write
Non-Private	Original	Creator	Read/Write
		Group members	Read-Only
	Copy	Shared with user group or DM group members	Read-Only

**Read* here means view, use to hang studies, or copy to other users.

**Imported DMs are automatically marked as Private for the importing user.

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, select the Hounsfield units tool, and then select 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, select the DICOM values button.
- On an image shortcut menu, select **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, select **View** > **DICOM Values**.
2. In the title bar of the screen that appears, select 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, select the print button.
2. In the **Print Image** dialog, 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. Select **Print**.
4. In the Windows print dialog, configure options and select **Print**.

Open a third-party application or function

If you configured a third-party application or function, you can open it from the toolbar.

- On the viewer toolbar, select the external tool button corresponding to the item to open.

Download images

You can download images and series from studies to your desktop in various formats.

- To download the selected image as a PNG (regardless of the current series layout), on the image shortcut menu, select **Download Image**.
- To download each image in the current series as a separate file, on the image shortcut menu, select **Download Series**, and then select the file format.

About viewing 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.

Exa PACS/RIS uses tracking IDs in the SR data to ensure that when you click a 2D/synthesized image annotation it jumps correctly to the corresponding 3D/BTO image. Additionally:

- If the BTO series is not already open, it opens next to the 2D/synthesized view in a 1 x 2 layout. You can go back to the original layout by selecting the backslash key (if the DM was not interrupted).
- When 3D CAD SR markings are present and you hover over a CAD SR marking on the synthesized or 2D view, the color changes to the hover color configured in viewer interface settings.

See also:

Configure annotation colors
View tomographic studies with CAD findings
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, perform the following steps 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, see Set up peer review by creating new roles, groups, and users.

1. On the burger menu, select **Setup**.
2. Next to the burger button, select the word in all caps, and then select **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** checkbox.
5. Select **SAVE & CLOSE**.
6. Continue to Link peer review users to resources.

Set up peer review by creating new roles, groups, and users

To add peer review to an existing user role, group, or user, see Set up peer review by using existing roles, groups, and users. To create a new user role for peer review, complete the following steps.

1. Following the steps in Create a user role, create a user role for peer review.
   Give the role a fitting name and description, such as `PR` and `Peer Review`.
2. In the **User Role Permission** area, select the **PeerReview** user right, and any other rights that you want to assign to peer review users.
3. Select **SAVE & CLOSE**.
4. Following the steps in Create a user group, create a user group for peer review, and select the user role you created previously.
5. Select **SAVE**.
6. Following the steps in Create a user, create peer reviewing users, or edit existing users to add them to the peer review group you created previously.
7. Select **SAVE**.
8. Continue to Link peer review users to resources.

Link peer review users to resources

To make peer review workflow available, you must link your peer review users to a Provider-Radiology resource.

1. On the burger menu, select **Setup**.
2. Next to the burger button, select the word in all caps, and then select **Providers & Resources**.

3. On the **RESOURCE** tab, select **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. Select **SAVE**.
5. On the **LOGIN DETAILS** sub-tab, select a user, and then select **LINK USER**.
6. Select **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, select **Setup**.
2. Next to the burger button, select the word in all caps, and then select **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. Select **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 assigned to them by a radmin can manually appoint peer reviewers for their studies with the following procedure.

Prerequisite: Configure peer review.

1. On the worklist, right-click a DICOM study, hover over **Exam**, and then select **Assign Study**.
2. In the **Study Assignment** dialog, on the **Assign for peer review** dropdown list, select a peer reviewer.
3. Select **SAVE**.

Reassign peer review

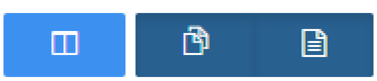
You can reassign a previously appointed peer review.

1. On the burger menu, select **Setup**.
2. Next to the burger button, select the word in all caps, and then select **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, appoint a new peer reviewer and select **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, select 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, select **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. Select 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, select the disagreement button.

2. In the **PEER REVIEW DISAGREEMENTS** tab, right-click a study, and then:
   - To get a third opinion, select **Reassign for Additional Review**, and then assign a new peer reviewer (see Assign a peer reviewer for a study).
   - To dismiss the study, select **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 the Peer Review Operational right.

1. On the burger  menu, select **Reports**.
2. Next to the burger button, select the word **REPORTS**, and then select **Peer Review Operational**.
3. Enter filtering criteria, and then select a button corresponding to the format in which you want to generate 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

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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **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** checkbox.
5. Scroll down to **Facility**, and select the checkboxes for the facilities where the form will be available.
6. Select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **Office**.
3. On the **COMPANY** tab, select the **APP SETTINGS** sub-tab, and then in the left pane, select **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. Select **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** checkbox, 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** checkbox, 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 ULI, PHN, 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 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, select **PATIENT INFORMATION**.
3. Select **CHECK-IN CODE**.
4. Send the code to the patient by using email, phone, or other means.

See also:
Add or edit a patient’s portal account

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, select **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 and/or verification.

 Sign-in information differs from the patient chart, requires verification.

See also:
Find a patient chart by entering search criteria
Find a patient chart by scanning a driver’s license
Verify eligibility of pre-orders and studies with PokitDok

View patient details

You can quickly view primary demographics and insurance information from the patient arrival worklist.

1. On the burger menu, select **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** button list, select your facility.
3. Select 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 following wait times.

 Waiting for less than 10 minutes

	Waiting for up to 10 minutes
	Waiting for 11 to 20 minutes
	Waiting for 21 to 30 minutes

See also:
Configure the wait time monitor

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, select **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** button list, select your facility.
3. In the patient shortcut menu, select **Patient Search**.
4. In the **Patient Search** dialog, enter search criteria and then double-click a patient in the list of results.
5. On the patient arrival worklist, within the patient record, select:
   Accept – Use the demographics entered by the patient
   Reject – Use the demographics from the patient chart
6. Optional. Select **Edit Patient Information** to edit demographics.

Create a new patient chart

1. On the burger menu, select **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** button list, select your facility.
3. Select the patient row to expand the record and then select **Create New**
4. Fill in the patient chart

See also:
Create a patient chart
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, select 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. Select 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, select **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** button list, select your facility.
3. On the patient row, select 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, select **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** button list, select your facility.
3. Select the patient row, and then select **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, select **PATIENT ARRIVAL WORKLIST**.
2. In the **Facility** button list, select your facility.
3. Select the patient row, and then select **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, select **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.

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, select **PATIENT**.
2. On the **Patient** screen, select the **SEARCH** tab.

   Note: If the tab bar is hidden, select the arrow next to Patient to display it.
3. In the **Starts With** dropdown list, select a target for your search criteria.
   This target applies to all boxes in the search bar.
4. In the **All** dropdown 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, select **PATIENT**.
2. On the **Patient** screen, select the **SEARCH** tab.

   Note: If the tab bar is hidden, select the arrow next to Patient to display it.
3. Select **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, you can open it to view patient demographics and other information. For more information about each of the settings within the patient chart, see Edit Study screen and other topics below.

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, select , and then select a tab (such as PATIENT GUARANTOR, or INSURANCE PROFILES).

See also:

Find a patient chart by entering search criteria
Find a patient chart by scanning a driver's license
Edit basic patient information
Edit other patient information

Send reports from the patient chart

You can send approved reports by email or fax directly from the patient chart.

1. Open a patient chart, and then select the **STUDIES** tab.
2. In the list of studies, right-click a study containing an approved report, select **Send Report**, and then select **Fax/Email**.
3. In the **Send Report** dialog, in the **Send Fax** and/or **Send Email** sections:
   a. In the **Send To** dropdown list, select a category of recipient.
   b. In the dropdown list on the right, select an individual recipient.
4. Select **SEND FAX** and/or **SEND EMAIL**.

Access confidential patient records (break the glass)

In emergencies you can use the Break the Glass function to open patient records that are usually 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:

On Physician Portal

Prerequisite: Configure access reasons (see "Configure app settings” under Configure your company).

1. On the **My Exams** worklist, select the **Break the Glass** checkbox.
2. In the **Break the Glass Warning** dialog, use the search tools to find a patient, and then double-click the patient record.
3. In the second **Break the Glass Warning** dialog, 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 select **ACCEPT**.
   Result: Studies for the selected patient appear in the My Exams screen.

On the Patient screen

1. On the burger menu, select **Patient**, and select the **Break the Glass** checkbox.
2. Find a patient chart in the usual 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 select the VIP star to change it to a solid star and thereby designate the patient as a VIP.

Create and modify a patient chart

Create a patient chart

You can create a patient chart.

1. On the burger menu, select **PATIENT**.
2. On the **Patient** screen, select the **SEARCH** tab.

   Note: If the tab bar is hidden, select the arrow next to Patient to display it.
3. Select **CREATE NEW**.
4. Type, select, or scan information in the available options.
5. Select **CREATE PATIENT**.

See also:
Edit basic patient information
Edit other patient information

About the PID, MRN, and account numbers

The patient ID (PID) is usually the same as the MRN or account number. When they differ, it often 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.

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

See also:
Configure alternate account number functionality
Use alternate account numbers

Edit basic patient information

You can edit or add new information to a patient chart. You can access the same settings from an order tab in the Edit Study screen.

1. Find and open a patient chart.
2. On the **PATIENT INFORMATION** tab, type or select information for the following options.

Setting	Description
Market	Select the markets that serve the patient.
Facilities	Select facilities that serve the patient.
DICOM Patient ID	Type the PID or patient MRN.

Setting	Description
Account No./Alt.	Type the patient's account or alternate account number. See About the PID, MRN, and account numbers
PHN/ULI	
Name	Type the patient's first, and last name. Optional: Type the middle name, middle initials, and/or suffix.
 / 	Grey = Non-VIP. Click to change to Yellow (VIP).
Alias	Type first and last aliases.
DOB	Select the patient's date of birth.
Is Newborn	Select if the patient is a newborn.
Marital Status	Select the patient's marital status.
Smoking Status	Select the patient's smoking status.
Racial/Ethnic	Checkboxes: Select all that apply. Dropdown list: Select the Hispanic or Latino ethnicity or non-ethnicity.
Physician	Select the patient's primary physician.
Ordering Facility	Available when using Mobile RAD. Select the ordering facility location or contact that serves the patient.
Sex	Select the sex of the patient.
Height/Weight	Type the patient's height and weight.
Patient Flag	Select a patient flag.
Language	Select the patient's preferred language.
HIE Consent	Select whether the patient has consented to release of demographics and medical data through a Health Information Exchange for treatment, payment, and health care operations purposes.
Select [more] next to words Patient Information to view the following settings	
License No./Province	Type the patient's driver's license number, and select the issuing state.
Exp. Date	Select the expiration date of the driver's license.
Emp. Status	Select the patient's employment status.
Employer Name	Type the name of the patient's employer.
Emp. Address	Type the street address of the patient's employer.
City/Province/Postal	Type or select the city, state or province, and ZIP or postal code of the patient's employer.
Phone/Fax	Type the phone and/or fax number of the patient's employer.
Reason for Death	If the patient is deceased, select the checkbox and then select the reason for death in the dropdown list.

Setting	Description
Notes	Type any notes you wish to include in the chart.
Users Assigned	Dynamically search for and select a user to to assign to the patient, and then click the add button. Optional: Repeat to assign more users.
Home Address	Enter the patient's primary contact information. SMS / Email Consent: Select whether the patient consents to be contacted by SMS text and/or email.
Contact Information	Enter the patient's secondary contact information.

3. Select **SAVE**.

Edit other patient information

In addition to basic patient information, you can enter a wide range of other patient-related information in the patient chart. Most of this information is mirrored in the Edit Study screen, giving you access to it through multiple workflows. To enter or edit this other information from a patient chart:

1. Open a patient chart.

   Note: If the tab bar is hidden, select the arrow next to Patient to display it.
2. Select a tab in the table below, and then enter settings.
   Refer to the descriptions and topics shown for details.

Patient Chart Tab	Topic
PATIENT GUARANTOR	Assign a guarantor for a patient
PATIENT ALERTS	Assign or remove patient alerts
INSURANCE PROFILES	Add or edit an insurance profile
STUDIES	Manage studies in the patient chart
ORDERS	Double-click an order in the list to open it in the Edit Study screen.
STUDY FORMS	Add a study form to a patient record
DOCUMENTS	View or add patient documents
PAYMENT HISTORY	View payment history and print receipts
ACTIVITY LOG	View activity logs
NOTES	Enter notes and reasons for study Open the call log

See also:
Find a patient chart by entering search criteria

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 formatting 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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **DICOM**.
3. On the **ISSUERS** tab, select **ADD**, and type a name for the issuing entity.
4. In the **Pattern** box, type a regular (pattern) expression for validating PID/account numbers for the specified issuer.
   Example: AB? matches a PID starting with AB and followed by one character, such as **AB1**, **ABC**, and **ABz**.
5. Select **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, select **SETUP.**
2. Next to the burger button, select 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. Under **Issuer Type**, select **Static** or **Dynamic**. If you select **Static**, in the **Issuer** dropdown list, select the issuer.
5. Select **SAVE.**

Configure a receiver rule for use with alternate account numbers

For each relevant receiver rule:

1. On the burger menu, select **SETUP**.
2. Next to the burger button, select 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** checkbox.
5. Select **SAVE**.

See also:
About the PID, MRN, and account numbers
Use alternate account numbers

Use alternate account numbers

To use alternate account numbers to link multiple patient records, complete the following steps.
Prerequisite: Perform the procedures under “Configure alternate account number functionality.”

1. On the burger menu, select **PATIENT**.
2. On the **Patient** screen, find the patient and open the patient chart.

3. On the **PATIENT INFORMATION** tab, select **MANAGE ALTERNATE ACCOUNT NUM/IDENTIFIERS**.
4. In the **Alternate Account Num/Identifiers** dialog, select **ADD**.
5. In the **Issuer Name and Type** dropdown list, select an option, and then type the alternate account number or identifier.
6. If using multiple alternate account numbers, select the **Primary** checkbox if you want the current number to be the primary one.
7. Select **SAVE**.
   You can repeat this procedure to add multiple alternate account numbers.

See also:
About the PID, MRN, and account numbers
Configure alternate account number functionality

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, select **ADD**.
3. Enter the information for the guarantor, and then select **SAVE**.

Manage studies in the patient chart

From the STUDIES tab of the patient chart you can create, schedule, and view payment status of prior or future studies of the patient.

1. Open a patient chart.
   Note: If the tab bar is hidden, select the arrow next to Patient to display it.
2. On the **STUDIES** tab, perform one or more of the following tasks.

Task	Topic
Find, view, and edit a study	Search for a study in the list. Double-click a study to open it in the Edit Study screen.
View approved reports	Select the approved report button of a study.
View payment status	An aggregate summary of study payments appears at the bottom of the screen.
Fax/Email approved reports	Right-click an approved study, point to **Send Report** and select **Fax/Email**.
View the claim inquiry screen	Right-click a study that has claim history, and then select **Claim Inquiry**.
Schedule an ordered study	Select an unscheduled study, and then select **Schedule Appointment** to open the study in the Find Slots screen (see Use the Find Slots feature).
Create a study for the patient	Select one of the following: **NEW STUDY**: See Enter appointment information **WALK-IN**: See Schedule a walk-in appointment

Task	Topic
Order images	1. Select a study whose images you want to order in the list, and then select **ORDER IMAGE**. 2. Select the patient and/or physicians to whom to send the images. 3. Type sending methods and notes, and then select **PLACE ALL ORDERS**.

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 options must be present for the update to be successful, select the help ? button on the right side of the PATIENT IMPORT button.

1. On the burger menu, select **PATIENT**.
2. On the **Patient** screen, select the **SEARCH** tab.

   Note: If the tab bar is hidden, select the arrow next to Patient to display it.
3. Select **IMPORT PATIENT**.
4. In the **Import Patient** dialog, select **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** checkbox.
6. Select **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 select **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 select **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, select **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, select the settings button, and then select **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, select **MERGE**, and then select **OK**.

Work in the dispatching dashboard

The dispatching dashboard is separate from the *dashboard*, which provides an overview of current orders. The *dispatching dashboard* provides a view of the worklist for entering and tracking orders for mobile radiology. Technologists who execute those mobile orders use the *Mobile RAD* app from their mobile devices. Before using the dispatching dashboard, you must configure the following 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.

See also:
Configure study statuses
What is the Dashboard?

View, create, and assign orders

View the worklist from the dispatching dashboard

1. On the burger menu, select **DISPATCHING DASHBOARD**.
2. To view all studies, select the **ALL** tab.
3. To view all pre-orders, select the **PRE-ORDERS** tab.
4. To view all orders with any order-related status that are not assigned to technicians or vehicles, select 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, select **DISPATCHING DASHBOARD**.
2. On the **TO BE DISPATCHED** tab, in the upper right corner, select a facility, and then select the **New Order** button.
3. In the **New Appointment** screen, find a patient and schedule a study as you typically would, but note the following on the **APPT. INFO.** tab:
   - In the **Ordering Facility** dropdown 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** dropdown 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. Select **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, select **DISPATCHING DASHBOARD**.

2. On the **TO BE DISPATCHED** tab, right-click an order, hover over **Dispatch**, and then select **Create New Dispatch**.
3. In the **Dispatch** screen, enter the following settings.

Setting	Description
[Dispatch resource dropdown list]	Select **Technologist** to assign the order to a technologist. 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 previously, 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. Select **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.

Group orders by dispatch ID

When dispatch of one or more orders and exams is completed, the Exa PACS/RIS assigns the same dispatch ID to all of the orders and exams. By grouping orders and exams by dispatch ID, you can apply and evenly divide transportation fees, setup fees, and “after hours” pricing to the orders and exams. These orders and exams remain open until set to Check Out/Complete, during which time they can be modified (by adding, editing, or removing exams or other services).

1. If an open dispatch ID exists, right-click an order, and in the **Dispatch** submenu, select **Add to Open Dispatch**.
2. Select the open dispatch ID to add to the new dispatch group.

Work with Mobile RAD

Mobile RAD is a mobile Android app that technologists use to manage their mobile exams.

Install Mobile RAD

All technologists and other users of Mobile RAD must follow the steps below to install the Mobile RAD app on their Android mobile device. If you do not have access to the SETUP area of Exa PACS/RIS, request assistance from an administrator.

Configure Exa PACS/RIS

1. In Exa PACS/RIS, on the burger menu, select **SETUP** > [**full caps menu**] > **Scheduling & Codes** > **STUDY STATUS**.
2. In the **Facility** dropdown list, select your facility.
3. For each status in the list related to mobile orders:

a. Double-click the status to open its settings.
b. On the **STUDY STATUS** sub-tab, select the **MobileRad Related** checkbox.
c. Select **SAVE**.

Install a PDF viewer

1. On your mobile device, go to the **Google Play Store**.
2. Install a PDF viewer, such as Adobe Acrobat, WPS Office-PDF, or Microsoft Office.

Install the APK

1. In Exa PACS/RIS, on the burger menu, select **Tools** > **MOBILE RAD**.
2. Copy **mobilerad.apk** to your mobile device (such as through email, chat, or File Explorer).
   Result: The browser downloads the mobilerad.apk file.
3. On your mobile device, in the **Blocked by Play Protect** message, select **INSTALL ANYWAY**.

Configure Mobile RAD

1. Tap and hold the **Mobile RAD** icon, and then select **App info** > **Permissions**.
2. On the **App permissions** screen, on the options menu, select **All Permissions**.
3. In the **Storage** folder of your mobile device, confirm that the **MobileRAD** sub-folder appears. If it does not, create the sub-folder.

Sign-In to Mobile RAD

1. From your site administrator, obtain the host name for Mobile RAD.
2. In Exa PACS/RIS, on the burger menu, select **SETUP** > [**full caps menu**] > **Office** > **COMPANY**.
3. Write down the value in the **Code** boxes.
4. Tap the **Mobile RAD** icon, and on the sign-in screen, select **HOST NAME ?.**
5. In the **HostName** field, enter the host name, and then select **YES**.
6. On the sign-in screen, enter the following:

Setting	Value
Username	Your user name for Exa PACS/RIS.
Password	Your password for Exa PACS/RIS.
Company Code	The code you wrote down earlier.

7. Select **LOGIN**.

Perform query and retrieve

You can query a server and retrieve studies.

Prerequisite: Configure DICOM settings for the server to query and for Exa PACS/RIS on the server.

1. On the burger menu, select **QUERY/RETRIEVE**.
2. In the dropdown 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, select **QUERY**.
    - To retrieve all matching studies, select **RETRIEVE**.
    - To retrieve some matching studies, select the studies, right-click, and then select **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, select 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.

Make Updox available in Exa PACS/RIS

By configuring Updox in Exa PACS/RIS, you make it available, 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, select **SETUP**.
2. Next to the burger button, select 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** checkbox, and then select the red switch to turn it ON. →
6. To assign administrator user rights, select a user in the left pane, and then select the **Administrator** checkbox.
7. On the **USER GROUPS** tab, open a group that uses Updox, and then under **Navigation**, select the **Fax Manager** checkbox. Repeat for all groups that use Updox.
8. At the top of the screen, select **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** checkbox.
11. Select **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, select **Settings**.
    b. Under **Privacy and security**, select **Site Settings**.
    c. Select **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, select **FAX MANAGER**.
2. In **Updox**, in the upper-left corner of the screen, select **MENU**.
3. On the **Admin** tab, select **Users**, and then select **New**.
4. On the **User Information, Settings, and Notifications** tabs, enter all relevant information.
5. Select **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, select **FAX MANAGER**.
2. In **Updox**, in the upper-left corner of the screen, select **MENU**.
3. On the **Admin** tab, select **Queues**, and then select **New**.
4. Type a name for the queue, select users who can access it, and then select **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, select **FAX MANAGER**.
2. In Updox, in the upper-left corner of the screen, select **MENU**.
3. On the **Admin** tab, select **Fax Settings**.
   A list appears of all fax numbers configured for Updox.
4. Select 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. Select **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, select **FAX MANAGER**.
2. In Updox, in the upper-left corner of the screen, select **MENU**.
3. On the **Admin** tab, select **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 checkboxes 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. Select **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, select **FAX MANAGER**.
2. In Updox, in the upper-left corner of the screen, select **MENU**.
3. On the **Admin** tab, select **Reminders**.
4. On the **Scripts** tab, select **New**.
5. In the pop-up window, select the type of script you want to add.
6. Enter the script and other information. To use the script, select the **Active** checkbox.

   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. Select **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, select **FAX MANAGER**.
2. In **Updox**, on the left pane, select **Inbox**.
3. In the list, select 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 select RESEND to retry the fax.
5. Select 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, select **FAX MANAGER**.
2. In **Updox**, in the upper-left corner, select **MENU**.
3. On the **Home** tab, select **Reminders Dashboard**.
4. Optional. In the left pane, enter criteria to filter the reminders list.
5. In the main list, select 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, select **FAX MANAGER**.
2. In **Updox**, on the left pane, select **Inbox**.
3. In the list, select the arrow (>) button corresponding to the order.
4. In the left pane, select **SEND ITEM**.
5. In the dialog, type the patient name to search for the patient, select the correct patient in the list of results, select the **Send to EHR** checkbox, and then select **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 options as needed (such as the subject line), and then select the checkbox 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. Select **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**, select **Text Message**.
2. In the **Send a Text Message** dialog, 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 checkbox for the document, select **SEND ITEM**, and then follow the same procedure for attaching a faxed document.
7. Select **Send Secure Text** or **Send SMS Text**.

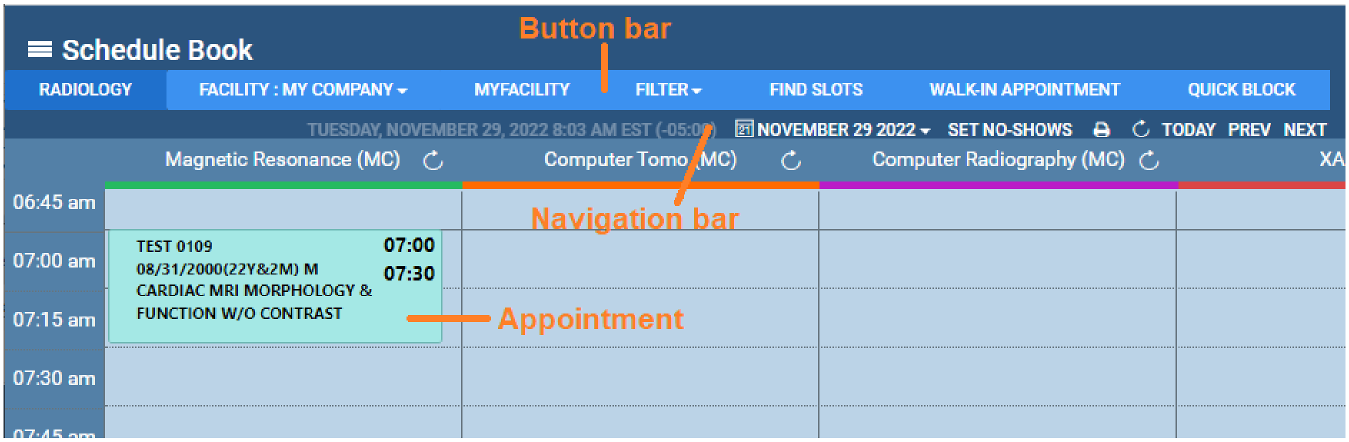
Work with scheduling

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.

About the schedule book

The schedule book displays a chronological list of appointments during a selected 24-hour period in each modality room at a selected facility. You can open the schedule book from the burger menu by selecting **SCHEDULE**.



Find an available timeslot

You can begin scheduling by finding an available timeslot in the *schedule book*, which is a calendar-style view of appointments by time and modality.

1. On the burger menu, select **Schedule** to open the schedule book.
2. On the button bar, in the **FACILITY** button list, select the facility for the exam.
3. Optional. If you configured a schedule filter, you can select it from the **FILTER** button menu.
4. On the navigation bar, use the date picker to select a date.
5. Double-click an empty timeslot in the column corresponding to the exam's modality.
6. Continue to Set up a patient.

See also:
Configure a schedule filter
Use the Find Slots feature

Set up a patient

To set up a patient, perform one of the procedures below.
Prerequisite: Start the scheduling workflow from Find an available timeslot.

Find an existing patient chart

1. On the **New Appointment** screen, select the **SEARCH** tab.
2. Under **Patient Search**, select a search mode in the dropdown 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** checkbox appears, you can select it to search for confidential patient records. See Access confidential patient records (break the glass).

4. In the list of search results, double-click the patient for whom you want to schedule an exam.
5. If the **Recent Schedule** dialog appears, select **NEW SCHEDULE**.
6. Continue to Enter appointment information.

Create a new patient chart

1. On the **New Appointment** screen, select the **SEARCH** tab.
2. Under **Patient Search**, select **CREATE & SCHEDULE**.
3. Under **Personal Information**, type the primary demographics (name, Patient ID, etc.) for the patient.
4. Continue to Enter appointment information.

Import a patient chart

1. On the **New Appointment** screen, select the **SEARCH** tab.
2. Under **Patient Search**, select **PATIENT IMPORT**.
3. Select **Choose File**, and then browse for and select a patient file.
4. In the **Open** dialog, browse for and select the patient file, and then select **Open**.
5. Optional: To merge the patient file that you are importing with an existing patient chart in Exa PACS/RIS, select the **Update Existing** checkbox.
6. Select **IMPORT**.
7. 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 the scheduling workflow from Find an available timeslot.

1. In the **New Appointment** screen, select 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 health service codes, appointment types, and appointment type procedures.
Available Date	The date of the timeslot you selected. You can select the calendar button to change the date.
Resource	The modality room you selected. Not available for editing in this screen.
Referring Physician	Type in the box to search dynamically for the referring physician, and then select one in the list. For more advanced searching, select the magnifying glass tool.
Ordering Physician	Type in the box to search dynamically for the ordering physician, and then select one in the list.
Attorney	Select an attorney in the dropdown list, if applicable.

Setting	Description
Stat Level	Select an urgency for the exam.
Code and Units	When you select an appointment type, the corresponding code appears in the Code box, and any available default units for the code appear. Edit the units if needed.
Modifiers	Type modifiers, if applicable.
[*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.

3. **Diagnostic Codes**, type search criteria and select the search button.
4. Select a diagnostic code in the list.
5. 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 the scheduling workflow from Find an available timeslot.

1. On the **APPT. INFO.** tab, scroll beyond Diagnostic Codes, and then under **Schedule Information**, enter the following information.

Setting	Description
Ordering Facility	Select the ordering facility, if applicable.
Place of Service	Select a place of service category.
Source	Select the event that initiated 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.
Supervising Physician	Type or select the supervising physician for the procedure.
Technologist	Select the technologist or vehicle linked to the exam.
Requesting Date	Select the requested date for the exam.
Remind Me for Earlier Appointment	Select if the patient would like to be reminded of an appointment taking place early in the morning.
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.
WCB Claim Number	Type the WCB claim number.

Setting	Description
Patient’s Condition Related To	Select whether the patient’s condition is related to their employment, auto accidents, or other accidents.
Body Parts Nature of Injury Orientation	If you select Employment above, select the following. • Select an affected body part. • Select the nature of injury for that body part. • Select the orientation of the body part. To add body parts, select the plus sign.
Accident State	If you selected a condition previously, select the state or province where the condition occurred.
Schedule Notes	Select a macro note, or type a note directly in the box.
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 the scheduling workflow from Find an available timeslot.

1. In the **New Appointment** screen, select 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 dropdown list. Select one, if available. Information for the provider you select appears in the other options.
Carrier	If no existing insurance providers are available, select a carrier here. Information for the carrier you select appears in other options, but *you must enter some options such as the group name and or health number manually*.
Provider Type	The provider type of the selected carrier is entered automatically.
Group Name	Type the subscriber’s policy number.
Relationship	The relationship defaults to “Self.”
DOB	Select the subscriber’s date of birth.
Sex	Select the patient sex.
Country / Address	Type or select the city, state, and postal code of the subscriber.
Subscriber Name	Type the name of the subscriber.
Alerts	Insurance or patient alerts.
Policy Number	Type the policy number.
Group No.	Optional. Type the subscriber’s insurance group number.

Setting	Description
Valid From/To Date	Select the dates during which the policy is valid.
Address	Type the street address of the subscriber.
Benefit On Date	Available only if applicable. Select the start date of benefits.
Verify	Available when a carrier is selected. Select to verify benefits.

2. Continue to Enter additional information and forms.

Enter other information and forms

You can add other physicians to the appointment, view exam prep instructions, view provider alerts, add patient alerts, and attach study forms such as for consent, HIPAA, and CT screening. You can have the patient verify the accuracy of the information in the form at the time of the exam.

Prerequisite: Start the scheduling workflow from Find an available timeslot.

1. In the **New Appointment** screen, select a tab and perform the corresponding task.

Tab on the New Appointment Screen	Task
EXAM PREP. INSTRUCTIONS	View prep instructions for the selected appointment type.
OTHER PHYSICIAN	In the **Other Physician** dropdown list, select a physician, and then select 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.
PROVIDER ALERTS	View alerts for the provider performing the exam.
PATIENT ALERTS	Select one or more checkboxes relevant to the patient undergoing the exam. **Note**: To add a new alert, at the bottom of the list of alerts, type a new alert and select the plus button.
STUDY FORMS	Select a form in the dropdown list. To fill out the form, select its edit button and select **SAVE**. To make the form available on the patient portal, select the **Patient Portal** checkbox.

2. Continue to Create an order.

Create an order

After entering all information related to the appointment, you create an order. When you create an order, the appointment is added to the schedule book (except for walk-in appointments) and becomes available in RIS and the worklist.

Prerequisite: Start the scheduling workflow from Find an available timeslot.

1. On the **New Appointment** screen, select the **APPT. INFO** tab.
2. Select **ADD STUDY**.
   Result: A study appears in the list based on the information entered for the exam.

3. At the top right corner of the screen, select **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
4. Optional. To view a quick summary of the exam in the schedule book, hover over the study block.

See also:
Other scheduling tasks
Edit order information

Other scheduling tasks

This section describes scheduling tasks that were not covered in A typical scheduling workflow.

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, next to **SCHEDULE**, select the arrow and then select **PENDING REFERRALS**.
2. On the **Pending Referrals** screen, enter the date range and facility of the referrals that you want to view, and then select the search button.
3. Double-click a referral in the list.
4. In the **Referral Status** dialog, select a status, type notes, and select **SAVE**.

Schedule a follow-up

If users specify follow-up exams, you can view a list of the specified exams and schedule them.

1. On the burger menu, next to **SCHEDULE**, select the arrow and then select **PENDING FOLLOW-UPS**.
2. On the **Pending Follow-Ups** screen, enter filtering criteria and then select **Enter**.
3. Double-click an exam in the list, and complete scheduling tasks.

See also:
Specify a follow-up exam

Create a quick block

You can create a *quick block* to specify timeslots 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.

1. On the burger menu, select **Schedule**.
2. On the button bar, select **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 also:
Configure a schedule template and schedule rules
Edit or delete schedule blocks

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, select **SCHEDULE**.
2. Under or on the right side of the button bar (on the navigation bar), select **SET NO-SHOWS**.
3. In the filtering dialog, enter a date range, select one or more statuses, and then select **NO-SHOWS**.
4. In the **No-Shows for** screen, if necessary, refine the list by adjusting search criteria.
5. To change the status of all studies in the list to "No-show," select **SAVE.**

Print the schedule book

1. On the burger menu, select **SCHEDULE**.
2. Under the button bar, on the navigation bar, select the print button.

Edit an appointment from a schedule block

You can edit the information in an appointment directly from its schedule block on the schedule book.

1. On the burger menu, select **SCHEDULE**.
2. Double-click a schedule block.
3. In the **Edit Order** or **Edit Study** screen, edit the appointment.
4. Select **SAVE.**

See also:
Edit order information
Edit study information

Reschedule an appointment

On the burger menu, select **SCHEDULE**, find a schedule block on the schedule book, and then choose one of the following methods to reschedule the appointment.

Drag the schedule block

To move the appointment to a later time within the same day and same modality room, you can drag its schedule block to a new timeslot.

Use the reschedule bucket

To move the appointment to a different day, you can use the *reschedule bucket*.

1. Right-click a schedule block, and then in the shortcut menu, select **Reschedule**.
2. In the **Reschedule** dialog, select the reason for rescheduling, and select **SAVE**.
   The schedule block moves from the calendar to the reschedule bucket (bottom of the screen).
3. Find an available timeslot on the calendar.
4. Drag the schedule block from the reschedule bucket to the new timeslot.
5. In the confirmation dialog, select **OK**.

Shorten or lengthen the schedule block

To change only the duration of the appointment, change the end time of the schedule block.

1. Select a schedule block.
2. Hover over 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, select **Schedule**.
2. Right-click a schedule block and use the shortcut menu to do the following.

Setting	Description
Schedule Appointment	Select to change multiple properties of the appointment in the Find Slots screen. See Use the Find Slots feature.

Setting	Description
Change Status	Hover over **Change Status**, and then select a new status. Modifies workflow elsewhere in the program.
Priority	Hover over **Priority**, and then select a new priority. Modifies workflow elsewhere in the program.
Flag As	Select to add flags in the submenu.
Stat	Select to assign a new urgency level.
Edit Study	Select to open the appointment in the Edit Study screen.
Exam Prep Instructions	Select to 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	Select to display the appointment confirmation screen. See About the appointment confirmation screen.
Cancel	Select to cancel the appointment. See Cancel an appointment.
Reschedule	Select to move the schedule block to the reschedule bucket. See Reschedule an appointment.
Attach Files	Select to open the Patient Documents screen. See View or add patient documents.
Log	Select to opens the audit log screen. See View and export audit log entries.

See also:
About drawing attention to orders and studies
Create a study flag

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, select **SCHEDULE**.
2. On the schedule book, right-click the appointment that you want to cancel, and then select **Cancel**.
3. In the **Order** dialog, in the **Cancel/Delete Reason** dropdown list, select a reason for the cancellation.
4. If you select “others” in the previous step, in the **Reason** box, type a reason.
5. Select **SAVE.**

Use the Find Slots feature

Find slots is an advanced feature for finding appointment times. It can be easier to find a timeslot first, and then schedule an appointment in it.

1. On the burger menu, select **SCHEDULE**.
2. In the schedule book, on the menu bar, select **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** dropdown list, select a search radius.
5. In the **Appointment Type** dropdown list, select an appointment type.
6. Optional. To narrow results, enter additional criteria in the **Referring Physician**, **Carrier**, **Facility**, **Modality Room**, **Date**, **Start Time**, and **End Time** options.
7. Optional. If more time is needed for the exam than the standard duration, select the Additional Time button.
   Result: Available timeslots 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 select Select all.
   - Timeslots overlapping soft quick blocks are accompanied by a pink square.
   - Timeslots overlapping hard quick blocks are omitted from the list.
8. In the list of timeslots, select a slot.
9. Optional. To schedule another appointment, select **ADD APPOINTMENT**, and then repeat the steps.
10. Select **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 display timeslots that are available for all of the appointments on the same day at the same facility.

1. In the **Available Slots** screen, select the **Distance from Patient** and **Patient ZIP Code** (or Postal Code). See Use the Find Slots feature.
2. In the **Appointment Type** dropdown list, select the first appointment type.
3. In the **Appointment Type** dropdown list, select the second appointment type.
4. In the **Group Schedule** dialog, select **BACK-TO-BACK**.
5. In the **Max Delay** dropdown list, select the maximum amount of wait time between appointments.
   Note: The **Same Day** option returns all available timeslots regardless of delay.
6. Enter additional scheduling criteria, select **SEARCH SLOTS**, and then select a slot.
7. Select **CREATE ORDER**.
8. Perform scheduling tasks, such as in A typical scheduling workflow.

Schedule a walk-in appointment

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 on the worklist so that staff can make accommodations.

1. On the burger menu, select **SCHEDULE**.
2. In the schedule book, on the menu bar, select **WALK-IN APPOINTMENT**.
3. Perform scheduling tasks, such as in A typical scheduling workflow.
   Note that Exa PACS/RIS fills in the **Available Date** box with the current date and time.

Change the time block duration on the schedule book

A *time block* is the amount of time represented by each block on the schedule book. By default time blocks are 15 minutes, but you can change them.

1. On the burger menu, select **SCHEDULE**.
2. On the schedule book, right-click anywhere in the left margin where the times of day appear.

3. Select a duration.

About the appointment confirmation screen

If configured (see the "Auto-Open Appointment Confirmation" setting in Configure other user settings), the appointment confirmation screen appears after creating an order. This screen provides a convenient summary of appointment-related information that you can share with patients. In the appointment confirmation screen you can:

- Under **Exam Details**, select an appointment card to jump to the Edit Study screen.
- In the **Send Emails To** box, type an email address and select the email button to send the confirmation.
- Select the print button to print the information.
- Verify the appointment with AHS.

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, select **SCHEDULE**.
2. On the schedule book, select a schedule block, and then select its edit button.
   Result: Depending on the type of block, one or more editing and/or deleting option appears.
3. Select an option, and if editing, make changes in the editing screen.

See also:
User rights
Create a user role
Edit Study 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 resource is also available to work in other modality rooms at the same time.
- If so, and if Autoblocking is selected in the schedule rule, Exa PACS/RIS automatically creates schedule blocks in the other timeslots to prevent future users from double-booking the resource.

These *auto-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.

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

About claim summaries and inquiries

The following describes the levels of detail at which you can edit and view claims.

Level	Description
Claims screen	The top-level list of claims. Find and view studies or claims
Claim detail	Double-click a claim in the Claims screen to view its contents.
Claim summary	A pop-up window on the Claims screen showing the claim's primary contents. View a claim summary
Patient claim summary	A patient-by-patient claim workspace with a billing provider focus. View a patient claim summary
Claim inquiry	A detailed patient-by-patient claim workspace with the ability to print statements and invoices, view claim forms, and add transaction comments and alerts. View a claim inquiry

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, select **BILLING**.
2. On the top navigation bar, select **Studies** or **Claims**.
3. Optional: Select a filter tab. The default filter is **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 select **Enter**.
   - Select 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.

See also:
Set the default filter for the study or claims list
Create a filter for the study or claims list

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, select **BILLING**.
2. On the top navigation bar, select **Studies** or **Claims**.
3. On the toolbar, select the filter button.
4. In the **Study Filter** or **Claim Filter** dialog, select **ADD.**

5. Type the **Filter Name** and **Filter Order** (the order of placement 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 dropdown list.
7. Under the blue line, enter filtering criteria.
8. Select **SAVE.**
   Note: You may have to refresh your browser for changes to take effect.

Set the default filter 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, select **BILLING**.
2. On the top navigation bar, select **Studies** or **Claims**.
3. On the toolbar, select the filter button.
4. In the **Claim Filter** dialog, in the **Default Tab** dropdown list, select the default tab.

View a patient claim summary

The patient claim summary screen is a patient-by-patient workspace in which you can view, print, and fax a summary of available patient claims by billing provider and date.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, find a claim for a patient whose summary you want to view.
4. Right-click the claim, and then select **Patient Claims**.
5. In the **Billing Provider** dropdown list, select a billing provider.
6. Optional. To modify the contents of the summary, select or clear these checkboxes:
   - **Include Billing Provider Info** – Select to include billing providers
   - **Include Third Party Payers** – Clear to exclude insurance providers
   - **Include All Comments** – Select to include claim comments
7. Optional: Select **PRINT** and/or **FAX.**
8. Optional. To move to through patient claim summaries, select **PREVIOUS** and **NEXT**.

View a claim summary

You can view a claim summary in a read-only pop-up window.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, find a claim for a patient whose summary you want to view, and select its claim summary button.

View a claim inquiry

The claim inquiry screen is a patient-by-patient workspace in which you can print statements and invoices, view claim forms, and add transaction comments and alerts.

Open the claim inquiry screen

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, find a claim for a patient whose history you want to view, and select its claim inquiry button.
4. To scroll through patients, select **PREVIOUS** or **NEXT**.

Add a transaction comment or alert

1. In the **Transaction Detail** area, select **ADD**.
2. In the left pane, type a comment.
3. Optional: Select checkboxes for screens on which you want your comment to appear as an alert.
4. Select **SAVE**.

Other tasks

- To add a reminder to follow-up on the claim, in the **Follow-Up Date** box, select a date, and then select **SAVE**.
- To add billing notes, under **Billing Notes**, select the notes button, and then select **SAVE**.
- To print a statement, select **PRINT STATEMENT**.
-
- To print an invoice, select **PRINT INVOICE**.
- To move to the patient claims screen, select **PATIENT CLAIMS**.
- To view insurance forms, in the **Insurance** area, select a form button.

Entering and submitting 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. An Encounter number of 1 is automatically added to new claims, and you can change this to a number between 1 and 9.

Prerequisite: Configure a billing provider.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Studies**.
3. Right-click a completed study (for example, with a status of "Read") for which you want to enter a claim, and then select **Create Claim**.
4. Optional: In the **Claim Creation** dialog, on the **CHARGES** sub-tab, select **NEW CHARGE** and do the following:
   a. In the **Service Description** dropdown list, select an item.
   b. In the **Service Code** dropdown list, select a new code, if necessary.
   c. Add pointers as needed.
5. In the **CLAIMS**, **INSURANCE**, **ADDITIONAL INFO**, and **BILLING SUMMARY** tabs, enter all necessary information.
6. Select **SAVE**.

See also:
Settings in the claim entry screen
Keyboard shortcuts for 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 can also use these steps to associating charges with a study.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Studies**, and then select **NEW CLAIM**.
3. In the **Claim Creation** dialog, search for a patient by name or MRN.
4. In the **PATIENT SEARCH RESULTS** list, select a patient, and then do one of the following.
   - To create a study-related claim, select the checkbox of the study, and then select **WITH STUDY**.
   - To create a non-study-related claim, select **CREATE WITHOUT STUDY**.
5. In the **Claim Creation** dialog, on the **CHARGES** sub-tab, select **NEW CHARGE** and do the following:
   a. In the **Service Description** dropdown list, select an item.
   b. In the **Service Code** dropdown list, select a new code, if necessary.
   c. Add pointers as needed.
6. Enter the remaining options as necessary, and then select **SAVE**.

See also:
Settings in the claim entry screen
Keyboard shortcuts for the claim entry screen

Select a delay reason for a claim

If submitting a late claim, you can add a reason for the delay. Exa PACS/RIS comes with pre-configured delay reasons, and you can configure additional reasons if needed (see Add codes and other basic data).

1. While a claim is open for creating or editing, select the **ADDITIONAL INFO** tab.
2. At the bottom of the **Additional Information** section, on the **Delay Reasons** dropdown list, select a reason.
3. Click **SAVE**.

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, select **BILLING**.
2. On the top navigation bar, select **Studies**.
3. Select multiple studies and then select **BATCH CLAIM**.
4. On the top navigation bar, select **Claims**.
5. On the search bar, in the **CLAIM STATUS** dropdown list, select **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 select **VALIDATE**.
8. Select **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, select **BILLING**.
2. On the top navigation bar, on the **Setup** menu, select **Auto Billing**, and then select **ADD**.
3. In the **Description** box, type a name for the profile.
4. In the **Results in Claim Status** dropdown 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 dropdown list (for example, Tech Start (TS))
6. Select the plus button.
7. Select **SAVE**.
   Result: In this example, when a study changes to the *Tech Start* status, Auto Billing creates a claim for that study.

See also:

Add a facility
Add modalities
Configure health service codes
User rights
Create a user role

About validation

To help prevent fraud, Ontario requires *validation* of health numbers and their version codes (which can change periodically) at two points during the medical scheduling process. The validation status is indicated by the color of the star on a worklist study row. A **red star** means "not validated," a **yellow star** means "validated when scheduled," and **a green star** means "validated on study date." An **orange star** means three conditions are met: no schedule is available, validation is complete, and an affirmative response was received from OHIP.

During validation, if a non-trivial discrepancy is found in patient demographics, Exa PACS/RIS automatically updates its patient chart to match that of OHIP.

Validate an exam or claim

To *validate an exam* means to validate the information on the patient's health card. You must validate an exam after you schedule it, and on the day of the exam. There are several ways to validate an exam, described as follows.

In the Edit Study screen

1. On the worklist, in a study row, select the edit button to open the **Edit Study** screen.
2. In the left pane, select **Insurance profile**, and then open a profile.
3. Under **Insurance Details**, select a level and an insurance carrier, type the health number, and then select the green **Verify** button.
4. To view a report of the eligibility check, select **View Report**.

On the worklist

1. On the worklist, select the **PRE ORDERS** or **ALL STUDIES** tab.
2. On the order or study shortcut menu, select **Actions** > **Manually Verify Eligibility**.
3. If the **Eligibility** worklist column is displayed, confirm that the green checkbox is selected.

On the Claims screen

1. On the burger menu, select **Billing**.
2. On the top navigation bar, select **Claims**, and then select one or more claims.
3. On the toolbar, select **VALIDATE**.

See also:

[About validation](#)
[Configure claim validation](#)

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, select the **FOLLOW-UP QUEUE** tab.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, right-click a claim and then select **Add Follow-up**.
4. In the **Add Follow-up** dialog, enter a follow-up date.
5. Optional. If the **Follow-Up User** list appears, select the person to whom to assign the follow-up.
6. Select **SAVE.**

Make quick changes to claims

You can make quick changes to claims without opening them for editing.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, right-click one (only) claim and then select one of the following.
   Change Claim Status – In the submenu, select a new claim status.
   Change Billing Code – In the submenu, select a new billing code.
   Change Billing Class – In the submenu, select a new billing class.
   Change Billing Payer Type – In the submenu, select 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, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, right-click a claim and select **Split Claim**.
4. In the **Create/Split** dialog, find a charge that you want to move to the new claim, and select its plus (+) sign.
5. Select **SAVE.**
   The new claim is added to the **CLAIMS** page.

Submit a claim

You can submit one or more claims of the same billing method.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. On the search bar, in the **BILLING METHOD** column dropdown list, select a billing method (for example “Paper Claim”).
4. In the list of claims, select one or more claims, select **VALIDATE**, and then resolve any issues.
5. In the upper-right corner of the screen, select the billing method selection button, select the same billing method that you selected previously (e.g. **Paper Claim**), and then select the button (e.g. select **PAPER CLAIM (B&W)**).
6. In the dialog do one of the following.
   - **Electronic claims** – In the EDI Claims dialog, select **DOWNLOAD**, and then upload the edi.txt file the clearinghouse.
   - **Other claims and invoices** - Download or print the invoice.

See also:

Configure columns on the Studies and Claims screens

Other billing-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, select **BILLING**.
2. On the top navigation bar, select **Claims**, and double-click a claim.
3. At the top of the screen, select the **Patient Chart** link.
   Result: The Patient Information tab of the patient chart opens.
4. Optional. Edit patient information and select **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, select **BILLING**.
2. On the top navigation bar, select **Studies**, and then open a study.
3. At the top of the **Claim Creation** or **Edit** screen, select **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, select **BILLING**.
2. On the top navigation bar, select **Studies**.
3. Double-click a study or claim in the list
4. In the **Edit** screen, select **Notes**.
5. In the **Notes** dialog, select a tab (such as STUDY NOTES), and then do one of the following.
   - Select **ADD**, type the note, and then select **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, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, right-click a claim and then select **View Documents**.
4. Optional. In the **Patient Documents** dialog, 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, in the right pane, select 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, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, right-click a claim and then select **View Documents**.
4. In the **Patient Documents** dialog, select **UPLOAD**.

5. In the second **Patient Document** dialog, enter the required metadata and then select **SELECT FILES**.
6. Navigate to the file to upload, and then select **Open**.
   Note: Exa Billing renames the file with a UID, and displays its icon in the right pane.
7. Select **SAVE.**

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, select **BILLING**.
2. On the top navigation bar, select **Report**, and then select a report type in the list.
   Enter criteria in the options provided, and then do one of the following.
   - To preview the report, select **VIEW**.
   - To export the report, select the button corresponding to the file format.

View approved reports associated with claims

You can view all available reports associated with a patient.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, right-click a claim and select **View Reports**.
4. In the **Approved Reports** dialog, double-click a report to open it.

Create and deliver a patient statement

If patients are in facilities such as nursing homes or hospice, and you send bills to their guarantor or a third party payer, you can change the mailing address when printing the patient statement.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Report**, and then select **Patient Statement** in the list.
3. Select criteria for the report.
   Note: In the US, some information such as the address is excluded from the patient statement if the patient is a minor.
4. In the **Statement Mode** button shortcut menu, select **select**.
5. In the **Mail To** button shortcut menu, select a recipient.
6. Click a format button to generate the report (**PDF**, **EXCEL**, **CSV**, or **XML**).

View the patient claim log

You can view a log of patient claim activity.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. In the list of claims, right-click a claim and select **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, select **BILLING**.
2. On the **Report** menu, select **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** checkbox.

5. To generate the report, select a report format button (such as **PDF** or **EXCEL**).

Open an insurance provider's website from a claim

When browsing claims, you can open the website of a claim’s insurance provider directly from a claim.
Prerequisite: Configure the URL of the website for the insurance provider (see Add an insurance provider).

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**, and then select **ALL CLAIMS**.
3. On the shortcut menu of a claim, select **Change Billing Payer Type**, hover over a payer type, and then select the URL.

Manage payments

Find and view payments

You can find and view existing payment information for reference or editing.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **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 select Enter.
   - Select a column header to sort the list of claims.
   - In the upper-left part of the screen, select 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.

Record a payment

You can record a payment based on an EOB or an invoice. "Recording" a payment enters the bulk payment in the system, but does not apply the payment to claims and charges. To apply recorded payments, see the "Apply payments" topics later in this section.

NOTE: Payments from Alberta Health are automatically applied to claims. You do not need to record them.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Payments**.
3. At the top of the list of payments, select **ADD.**
4. In the **PAYMENTS** screen, enter the payment details, and then select **SAVE.**
5. Optional. New buttons appear in the middle of the screen that you can use as follows.
   - To record a new payment, select **ADD**.
   - To print a record of the payment, select **PRINT**.
   - To delete the current payment, select **DELETE**.
   - To attach documents, select **DOCUMENT**.

See also:

[Apply payments against a list of unpaid claims]
[Apply payments against a customized list of claims]
[Apply payments in the Files tab]

Step through claims to add payments

You can step through claims and add payment information.

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Claims**, and open a claim.
3. At the bottom of the **PAYMENTS** sub-tab, select **NEW PAYMENT**.
4. Enter payment information, select **APPLY**
5. In the detail screen, enter payment details.
   Optional: To attach documents, select **DOCUMENTS**.
6. Select **SAVE**, then close the details screen.
7. Select **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, select **BILLING**.
2. On the top navigation bar, select **Payments**.
3. In the list of payments, open a payment.
4. In the bottom pane, select 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, edit payment information as needed and then select **PAY IN FULL**.
   Result: Exa Billing applies payment to the line items in the list in order, until the payment balance is 0.
8. Select **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, select **BILLING**.
2. On the top navigation bar, select **Payments**.
3. In the list of payments, double-click a payment.
4. In the bottom pane, select 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, edit payment information as needed and then select **PAY IN FULL**.
   Result: Exa Billing applies payment to the line items in the list, in order, until the payment balance is 0.
7. Select **SAVE**.

Apply payments in the Files tab

The Files tab lists files that are sent to or received from OHIP. If you receive a file from OHIP for an unapplied payment, you can apply the payment directly from the payment file.

1. On the burger menu, select **Billing**.
2. On the top navigation bar, select **Claims**.
3. On the **Files** tab, select the **Apply** button of the payment file.

See also:

[About exchanging files with healthcare agencies]

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, select **BILLING**.
2. On the top navigation bar, select **Claims**.
3. On the shortcut menu of the claim to pay, select **Adjust to Paid in Full.**
4. In the **Adjust to Paid in Full** dialog, in the **Adjustment Codes** dropdown list, select an adjustment code.
5. Select **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, select **BILLING**.
2. On the top navigation bar, select **Payments**.
3. In the list of payments, double-click a payment.
4. In the bottom pane, select the **APPLIED PAYMENTS** tab.
5. Edit the payment information and then select **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, select **BILLING**.
2. On the top navigation bar, select **Payments**.
3. Filter the list of payments as needed.
4. Do one of the following.
   - To download a CSV file, select **EXPORT**.
     Result: Exa Billing downloads the list to your Windows Downloads folder.
   - To download a PDF file, select **GENERATE PDF**, and then download the PDF from the preview window.

About exchanging files with healthcare agencies

Exa PACS/RIS automatically gathers all pending claims submissions, creates a batch file, and sends the file to OHIP. It also receives acknowledgment, payment, and error files from OHIP. These sent and received files appear in the Files tab, where you can view them and use them to apply payments.

Exa PACS/RIS can also exchange files with the WCB. Select Alberta WCB as the clearinghouse, and use the EDI template for Alberta WCB to generate the export in the required format. You can download the file to your local workstation. Any included EOB codes are used to retrieve CAS codes, and both are stored along with payment details in the Exa PACS/RIS database. You can download, import, and upload ERA/EOB files to and from the WCB.

See also:

Exchange files with healthcare agencies
Apply payments in the Files tab
Add codes and other basic data
Create or edit an EDI or ERA template
Configure an EDI clearinghouse

Exchange files with healthcare agencies

You can exchange files such as payment records with healthcare agencies if supported by their clearinghouse (or if the healthcare agency acts as its own clearinghouse).

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **EOB**.
3. Optional. To preview the file before importing it, select **PREVIEW EOB FILE**, browse for and select the file, and then select **Open**.
4. To receive a file, select **Download**.
5. To send a file, select **UPLOAD & PROCESS EOB FILE**, browse for and select the file, and then select **Open**.

See also:

About exchanging files with healthcare agencies

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, select **BILLING**.
2. On the top navigation bar, select **Payments**.
3. On the **Payments** screen, select the **Payment Status** button (ALL SELECTED) and then select **Unapplied**.
4. On the search bar, select:
   - PAYER TYPE = Patient
   - An accounting date range
5. Select **APPLY TOS PAYMENT**.

Write off a small balance

If the patient's total account balance falls below a specified amount, you can automatically write them off (adjust them to zero).

1. On the burger menu, select **BILLING**.
2. On the top navigation bar, select **Payments**.
3. On the **Payments** screen, select **SMALL BALANCE ADJUSTMENT**.
4. In the **Small Balance Adjustment** dialog, type the total patient account balance at or below which Exa PACS/RIS should write off that balance, and then select **NEXT**.
5. Confirm the contents of the results list, and then select **COMPLETE**.

Work with Alberta Netcare

The Alberta version of Exa PACS/RIS allows you to access Alberta Netcare from within Exa PACS/RIS, search for patients in the patient registry, and reconcile them against records in Exa PACS/RIS.

For audit reports specific to Alberta workflow, see the following topics:
Frequently Accessed Record Audit
Lack of Use Audit
Same User Same Patient Last Name Search Audit

Open to the Alberta Netcare sign-in screen

If you need to sign in to Alberta Netcare at any time other than when first signing in to Exa PACS/RIS:

- On the burger menu, select **ALBERTA NETCARE**.

Sign in to Alberta Netcare

You must sign in to Alberta Netcare to access the client registry and search for patients.
Prerequisites:

- Add a facility with an Alberta WDFA.
- Obtain an RSA SecurID passcode. Note, the passcode expires quickly, and you must obtain a new one each time you sign in.

1. Sign in to Exa PACS/RIS as a user with Alberta Netcare rights.
2. On the **Alberta Netcare** screen, under **RSA SecurID:**
   a. In the **User ID** box, type your RSA user name.
   b. In the **Passcode** box, type your randomized user ID, FOB, or token.
   c. Select the **I agree to the EHR Terms of Use and Disclaimer** checkbox.
3. Under **Alberta:**
   a. Type your Netcare credentials.
   d. In the **Facility** list, select your WDFA facility.
   e. Select **LOGIN**.
4. Select **EXIT TO WORKLIST**, or navigate to another part of Exa PACS/RIS.

Reconcile patient charts against the client registry

You can search the client registry for patients matching a currently opened patient in Exa PACS/RIS, and then reconcile demographics.
Prerequisite: Sign in to Alberta Netcare

1. In Exa PACS/RIS, Find and open a patient chart.
2. On the **Patient Information** tab, select the Search Client Registry button.
3. In the **Search Client Registry** screen, in the **Search Results** area, select the row corresponding to the patient you want to reconcile against.
   Note: If the correct patient does not appear in the search results, use the ULI or Demographics search tools at the top of the screen to find another patient.
4. In the **Alert** message box, select **YES, PROCEED**.
5. In the **Additional Details for Selected Patient** area, select the **Update** checkbox next to each demographic that you wish update in Exa PACS/RIS, and then select **APPLY UPDATED DETAILS**.
   Note: Updating the preferred name enters it into the First Name Alias box in Exa PACS/RIS.

See also:
When to reconcile patient charts against the client registry

About the Search Client Registry button

If you signed in to Alberta Netcare, the Search Client Registry button appears in blue, and is available. You can select this button to open the Search Client Registry screen, where you can search for patients and reconcile demographics. The Search Client Registry button is unavailable if you did not sign in to Alberta Netcare. If you select the Search Client Registry button when it is unavailable, Exa PACS/RIS notifies you that you are not signed in, and that you must sign in to continue (see Open to the Alberta Netcare sign-in screen).

When to reconcile patient charts against the client registry

For every patient encounter, it is the responsibility of reception and/or booking clerks to determine whether the patient's chart in Exa PACS/RIS must be reconciled against the client registry. Reconciliation is required in the following cases.

- **Immediately after creating a new patient chart**
  See Create a patient chart.
- **If working with a patient who has not had an exam within a year**
  In the patient chart, on the **Studies** tab, check the date of the last exam.
- **If the patient's demographics changed since their last visit**
  During registration or check-in, ask the patient whether their information has changed.
- **If the patient's chart has not been reconciled within a year.**
  Check the date of last reconcile (directly to the right of the Search Client Registry button).

Work with reports

Create, view, and deliver reports

Create a 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, select **REPORTS**.
2. On the top navigation bar, select **Report**, and then select a report type in the list.
3. Below the **Filter Fields** label, select criteria to define the content of the report.
4. Select **VIEW**, or select an output format (**PDF**, **EXCEL**, **CSV**, or **XML**).

See also:
Create a billing report
Create a peer review report
Create and deliver a patient statement

View your saved reports

You can view open and download reports that you previously saved.

1. On the burger menu, select the arrow next to **REPORTS**, and then select **MY REPORTS**.
2. Select a report in the list, and then:
   - Select to download
   - Select to open

Send reports to providers

You can configure Exa PACS/RIS to automatically send reports and images through email to specified provider locations/contacts and their provider groups.
Prerequisite: Add a referring physician or ordering physician to any studies whose reports you want to send (see Edit study information).

1. On the burger menu, select **SETUP** > [**full caps menu**] > **Providers & Resources** > **RESOURCE**.
2. In the list of resources, double-click a provider type resource.
3. On the **LOCATIONS/CONTACTS** sub-tab, double-click a location/contact in the list.
4. Double-click a location/contact in the list. In the **Contact Information** area, in the **Email** box, type the email address of the provider contact.
5. In the **Reports to Me** area, under **Contact Information**, enter the following settings. To send reports to other members of the provider location/contact's provider group, under **Reports to Group**, enter the same settings.

Setting	Description
Email Report Link	Select to send a link to the report in an email.
Postal Mail	Select to send a hard copy of the report to the mailing address entered in the Contact Information area.
Fax	Select to send a fax of the report to the fax number entered in the Contact Information area.
Email Attachment	Select to send the report as an attachment to an email.

Setting	Description
Auto-Print	Available when you select postal mail. Select a printer in the dropdown list to automatically print reports.
Office Fax	Select to send a fax of the report to the office fax number entered in the Contact Information area.

6. Optional: Under **Report Password**, type a password to require to open reports.
7. Select **SAVE & CLOSE**.
   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.

Frequently Accessed Record Audit

This report contains:

- The name and ID of users who accessed the same patient records more than 5 times within a specified period
- The ULI and name of the patients whose records they accessed
- The number of times the records were accessed

To generate the report:

1. In the browser’s URL box, type the following parameters at the end of the Exa PACS/RIS URL. You can modify the values in blue as needed.

   /getFrequentlyAccessedPatientRecords?begin_date=**2020-07-21**&end_date=**2020-09-21**&threshold=**3**&username=**bbaker98**

Lack of Use Audit

This report contains a list of users in Exa PACS/RIS who were inactive in the Alberta EHR within a specified period. To generate the report:

1. In the browser’s URL box, type the following parameters at the end of the Exa PACS/RIS URL. You can modify the values in blue as needed.

   /getLackOfUseAudit?begin_date=**2020-08-21**&end_date=**2020-09-21**&threshold=**0**

Same User Same Patient Last Name Search Audit

You must have a specific user right to generate this report. This report contains:

- The name and username of users who accessed the records of patients with the same last names as the users, within a specified date range.
- The date and time of access, the patient name, and the ULI whose record was accessed.

To generate the report:

1. On the burger menu, select **Reports** > **Operations** > **Same Last Name User Audit**.
2. Select a date range and one or more facilities.
3. Optional. Enter a username, or leave blank to search all users.
4. Select **CSV** to generate the report.

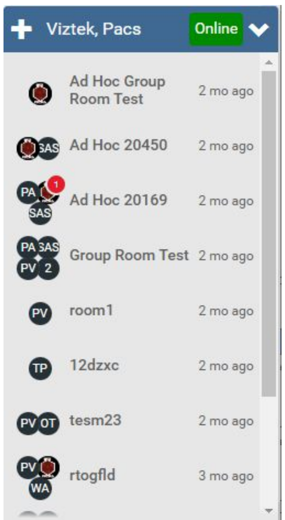
Work with Exa Chat

What is Exa Chat?

Exa Chat is a program within Exa PACS/RIS that provides secure *chat* (exchange of 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 select 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” (user with Group Chats Management rights).	Any user with Personal Chat Allowed rights.
Who can/remove add members?	The manager. No special user rights are required to be added.	Any member can add anyone else with Personal Chat Allowed user rights.
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, select the add button.
2. In the **Add room** dialog, 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 select **Enter**.

Join a group chat room

You can join a group chat room that was configured in Exa PACS/RIS.

Prerequisite: Add a group chat room

1. On the contact list, select the add button.
2. In the **Add private room** dialog, 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 select **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, select the add button.
2. In the **Add Room** dialog, select **CREATE ROOM**.
3. In the **Create new room** dialog, type a title for the room, and then select **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 select **Enter**.
6. The message is sent to all members in the chat room.

Minimize or restore chat rooms

- To minimize a chat room, select its minimize button.
- To minimize Exa Chat (all chat rooms and the contact list), select the minimize button on the contact list.
- To restore a single chat room or all chat rooms, select 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. Select any room in the list to re-open it and re-initiate a chat.

Add a member to a chat room

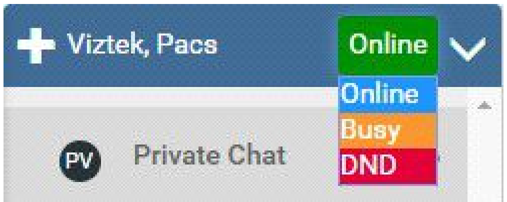
You can add a new member to an existing chat room. You can also add a group chat room as a "member" of another chat room.

1. On the header of a chat room, select the settings button.
2. Select **Add users or Groups**.
3. In the **Add user** dialog, begin typing a contact name, or a group chat room name, and then select the name from the list.
4. Select **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, select 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, select 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, select 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.

1. On the burger menu, select **SETUP**.
1. Next to the burger button, select the word in all caps, and then select **User Management**.
2. On the **USER ROLES** tab, select **ADD**.
3. Type a name for the role (such as Chat), and a description, and then select **SAVE.**
4. On the **USER ROLES** tab, double-click the user role you just added.
5. Select one or more of the following checkboxes.
   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. Select **SAVE.**

See also:
Manage users

Rename a chat window

You can change the name of an existing chat room.

1. Select Settings in the chat room that you want to rename.
2. Type the new title in the box, and then select **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. Select Settings in the chat room that you want to archive.
2. Select **Archive the chat**.

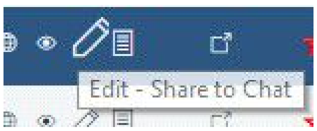
Use Exa Links

What are Exa Links?

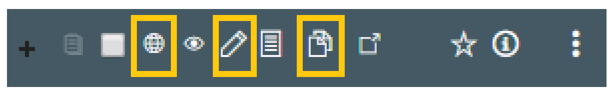
Exa Links are links to Exa PACS/RIS controls that you send to chat members. Recipients can select the Exa Links to open patient charts, studies in the Edit Study screen or viewer, approved reports, notes, and other assets.

Find and send an Exa Link

If you hover over 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 select **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, select **Attached Files**.
2. In the **Patient Document** dialog, 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 computer (see Install and configure tools).

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.

1. On the burger menu, select the arrow next to **TOOLS**, and then select **CD IMPORT**.
2. If the “Open Opal Import?” message appears, select the checkbox, and then select **Open Opal Import**.
3. In the **OpalImport** dialog, select **Select Files/Folders or DICOMDIR to Import**, and then browse for and select files to import.
4. Enter customization settings and then select **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, select **Import Images**.
   Note: If the “Open Opal Import?” message appears, select the checkbox, and then select **Open Opal Import**.
2. In the **OpalImport** dialog, 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. Select **Select Files/Folders or DICOMDIR to Import**, and then browse for and select files to import.
5. Enter customization settings and then select **Import**.

Work with Patient Portal

Patient Portal is a website that patients can use to view or modify information about their past and future exams, demographics, insurance, guarantors, and representatives, and to schedule appointments.

About creating a patient account

Before the patient can use Patient Portal, clinical staff must work with the patient to create an account. You can choose one of two workflows to create an account: initiated by clinical staff, or initiated by the patient.

Create a patient account

To create a new patient portal account:

As clinical staff

1. Provide the patient portal URL to the patient. You can contact the patient directly, or add the URL to the appointment confirmation screen or automated appointment reminders.
2. In the patient's chart, select **PORTAL ACCOUNT**.
3. Enter information as needed, and then select **CREATE**.
   Result: Exa PACS/RIS sends an email to the patient with a link they can use to set their password.
3. Click **SAVE**.

As the patient

1. On the patient portal sign-in screen, select **NEW USER**.
2. In the **New User Registration** dialog, fill out the form, and then select **Save**.
3. Open the email from your healthcare facility, and then select the verification link to verify your email address.

Link the portal account to a patient chart

When a patient initiates creating their own Patient Portal account, the demographics they enter are sent to Exa PACS/RIS. You must reconcile that information to the patient's existing chart, or use it to create a new chart.

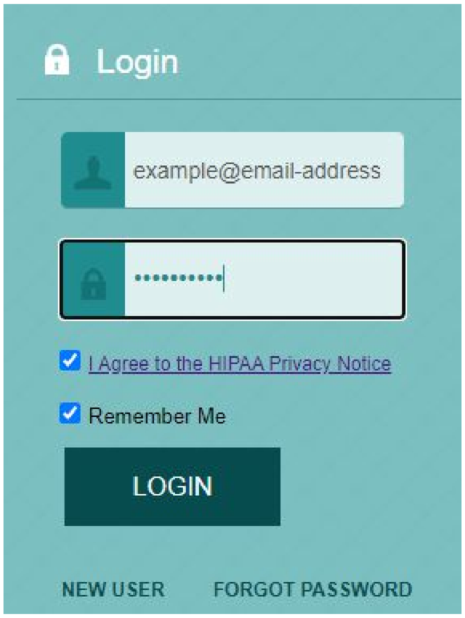
1. On the burger menu, select **PORTAL REG USERS**.
2. On the **Portal Registered Users** screen, open a user of Verified status.
3. In the **Portal Registered Information** screen, in the **Patient Match** area, search for a matching patient. If no matching patients appear, select **CREATE NEW**, edit the patient's information as needed, and then select **CREATE PATIENT**.
4. Open the matching patient, and check the **Registration Information** pane on the right; if any information appears in yellow, decide whether you want to update the patient chart with the new information.
5. Do one of the following:
   - To update the patient chart and link the account, select **SAVE AND LINK**, and then select **UPDATE**.
   - To continue linking the account without updating the patient chart, select **SAVE AND LINK**, and then select **CONTINUE WITHOUT UPDATING**.
   - To reject the registration request altogether, select **REJECT**.

Use the patient portal

Only patients and authorized representatives can use the patient portal, but you can refer to these instructions to assist patients.

Sign in to the patient portal

1. Go to the URL given to you by your healthcare provider.



2. In the **Login** pane, in the first box, type your email address.
3. In the second box, type your password.
4. Select the **I Agree to the HIPAA Privacy Notice** link to open the notice, and then read it.
5. If you agree, select the **I Agree to the HIPAA Privacy Notice** checkbox.
6. Optional. To automatically fill in your email address whenever you go to the sign-in page, select the **Remember Me** checkbox.
7. Select **LOGIN**.

I forgot my password

If you forget your password, you can reset it from the sign-in page.

1. On the sign-in page, on the right pane, select **FORGOT PASSWORD**.
2. In the **Forgot Password** box, type your email address and select **SUBMIT**.
3. Open the email sent to the address you entered, and use the link to reset your password.

Go to the Home screen

- In the left pane, select **Home**.

Find a location

You can search for a healthcare facility near you on a map.

1. In the left pane, select **Our Locations**.
2. In the list of locations, select a location to show it on the map.

View appointments and appointment confirmations

You c an view information about your past and future appointments, and view and print the appointment confirmation card.

1. On the home screen, select the **Future Appointments** or **Past Appointments** tab. Each appointment appears in a row.
2. To open the appointment confirmation card, on the left side of an appointment row, select the appointment card button.
3. To print the appointment confirmation card, open the confirmation card, and then select **Print**.

Upload a document

You can send us documents such as scans of your insurance card, forms, and reports from prior exams by uploading them in the patient portal.

1. On the home screen, select the **Future Appointments** or **Past Appointments** tab.
2. Find the row containing the appointment that pertains to your document.
3. On the right side of the row, select the upload button.
4. In screen that appears, enter any of the following that may be helpful to manage the document:
   - **Document Type** - Select the type of document to upload.
   - **Document Notes** – Type a description, or other notes, if needed.
   - **Created By** – Type the originator of the document (such as a doctor, or yourself).
   - **Import/Upload Date** – Type the current date.
5. Select **Upload**.

View your appointments in a calendar

You can open a calendar view of your appointments.

- On the home screen, select the Calendar button.

Request an appointment

You can request an appointment for specific study on a specific date at a selected location. If you do not know this information, leave the options blank (this does not affect how quickly your appointment will be scheduled).

1. On the home screen, select the menu button.
2. Select the Schedule button.
3. On the **Appointments** tab, select **Add**.
4. Under **Add Information**, enter the following settings.

Setting	Description	
Location	Select your first choice of healthcare facility for the appointment.	
Modality	Select the type of imaging to receive from one of the following.	
	AT	
	BD	Bone density
	BR	
	BTO	Breast tomography
	CR	Computed radiography
	CT	CT (computed tomography)

Setting	Description	
	DG	Diaphanography
	DX	Digital radiography
	MG	Mammogram
	MGK	
	MR	MRI (magnetic resonance imaging)
	NM	Nuclear medicine
	OT	Other
	PT	PET (positron emission tomography)
	RF	Radio fluoscopy
	RT	Record of treatment
	SC	Secondary capture
	SP	Stereo-photogrammetry
	TM	
	US	Ultrasound
	XA	X-ray angiography
Referred By	Select your first choice of date for the appointment.	
Requesting Date	Select your first choice of date for the appointment.	
Schedule Notes	Type any special instructions or notes to the healthcare provider.	
Appointment Type	The appointment type corresponding to the selected modality, if available. Filled in automatically.	
As Soon as Possible	If the appointment is urgent, select this checkbox.	

5. Click **Save**.
   Result: The appointment request is sent.

Update insurance information

If your insurance policy changes, you can update it.

1. On the home screen, select the menu button.
2. Select the Insurance button.
3. On the **Insurance** tab, find the policy you want to update, and on the right, select its edit button.
4. Edit the information as needed, and then select **Save**.

Add an insurance policy

If you obtain new a insurance policy, you can add it.

1. On the home screen, select the menu button.
2. Select the Insurance button.

3. On the **Insurance** tab, select **Add**.
4. Enter all relevant information.
   Note: If this is your only policy, in the **Level** list, select **Primary**. Otherwise, select **Secondary** for your second policy, or **Tertiary** for your third policy.
5. Select **Save**.

Add a guarantor

A guarantor is a person who accepts financial responsibility to pay the medical bill for the patient. To designate a guarantor:

1. On the home screen, select the menu button.
2. Select the Guarantor button.
3. On the **Guarantors** tab, select **Add**.
4. Enter information about the guarantor, and then select **Save**.
   Note: Options with an asterisk (*) are required.

Update my profile

If your personal information changes, you can edit it.

1. On the home screen, select the menu button.
2. Select the Edit My Profile button.
3. On the **Credentials** tab, edit information as needed, and then select **Save**.

Reset my password

For security and protection of your personal health information, periodically reset your password.

1. On the home screen, select the menu button.
2. Select the Edit My Profile button.
3. On the **My Account** tab, select **Reset Password**.
4. Type your current and new password (twice), and then select **Save**.

Add an email address

To add a new email address to your account:

1. On the home screen, select the menu button.
2. Select the Edit My Profile button.
3. On the **My Account** tab, in the **Secondary Email** box, type an email address, and then select the plus sign.
   Result: An verification email is sent to the address you entered.
4. Use the link in the verification email to verify your new address.

View account activity

To see a history of activity on your account:

1. On the home screen, select the menu button.
2. Select the Activity Log button.
3. Optional. To search for a specific log entry, select **Search**, and then:
   a. Select a search key (**Logged Date**, **Screen Name**, **Email Address**, or **Log Description**).
   b. Type a value to search for (for example, 01/31/2021).
   c. Select **Search**.

View authorized representatives

An authorized representative is a person you authorize to use your patient portal account. To view a list of your authorized representatives:

1. On the home screen, select the menu button.
2. Select the Authorized Representative button.

Sign out of the patient portal

When finished using the patient portal, sign out immediately.

- In the upper-right corner of the screen, select the power button.

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 boxes, you can search for any part of the number. For example:

In the account number box, type: 20
Exa PACS/RIS finds: 203, 1203, and 01203.

In a name box (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 box, 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 box 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 option	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 and commands for Exa Trans

When using Exa Trans, 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
ApprovingPhysicianAddress2	Approving Physician Address 2	PR, ET, NT, SF, CF

Merge Field	Formal Name	Scope[1]
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
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

Merge Field	Formal Name	Scope[1]
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
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

Merge Field	Formal Name	Scope[1]
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
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

Merge Field	Formal Name	Scope[1]
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
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

Merge Field	Formal Name	Scope[1]
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
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

Merge Field	Formal Name	Scope[1]
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
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 administrator can assign to a user role. All of these rights may not be available depending on your product and configuration.

Note: Shaded rows indicate that the right is not currently in use.

Category	Right	Description
Alberta Netcare	Netcare Login	Allows signing in to Alberta Netcare
	Alberta Netcare Log	Allows viewing the Alberta Netcare log
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 that are validated during claim validation
	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

Category	Right	Description
Billing	Claims	Allows working with claims
	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
	Edit Claim Status	Allows manually changing claim statuses
	Reassess Claim	Allows submitting rejected claims for reassessment
	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.

Category	Right	Description
Billing/ Report		All rights in this category allow creating the corresponding report
	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	
	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

Category	Right	Description
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
	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

Category	Right	Description
Home	Allow Reset Approved studies	Allows resetting approved studies to Scheduled status
	Allow Reset of Canceled and No Show Studies	Allows resetting studies from Canceled 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 canceling 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 opening 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 information in 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

Category	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

Category	Right	Description
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).
	Break the Glass	Allows use of the Break the Glass function to access confidential records.
	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 adding and editing patient immunization records
	Immunization (Read Only)	Allows viewing 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
	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	Allows merging of patient charts
	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

Category	Right	Description
	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
	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

Category	Right	Description
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 Reg Users	Makes the Portal Reg Users option available on the burger menu
Reports		All rights in this category allow creating the corresponding report
	Cancellation Reason	
	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	
	Relative Value Units	
	Scheduler Activity	
	Studies Breakdown	
	Studies by Modality	
	Studies by Modality Room	
	Modality Breakdown	
	Transcription Study Count	
	Turnaround Time (TAT) – Calculated	

Category	Right	Description
	Fees by Facility and Modality	
	Fees by Radiologist and Modality	
	Unfinished Studies	
	Same Last Name User Audit	
	Unsigned Orders	
	STAT Tracking	
	Insurance vs LOP	
	Marketing Report Export	
	Technologist Productivity	
	Audit Trail	
Schedule	Add Study	Allows adding studies to orders
	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
	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

Category	Right	Description
	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
	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 timeslots from the schedule book
	Stat	Allows setting STAT levels for a study or order from the worklist

Category	Right	Description
	Status Validation	Allows validating a study in the Validation screen when validation rules are set within the Study Status workflow
	Study Service Code Update	Alberta only.
	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
	WCB Injury Codes	Allows adding, editing, and deleting WCB injury codes
	Body Parts	Allows adding, editing, and deleting body parts for WCB injury codes
	Cognitive Status	Allows adding, editing, and deleting cognitive statuses
	Health Service Code	Allows adding, editing, and deleting health service 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
	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

Category	Right	Description
	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
	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 Shows	Allows setting an appointment to a no-show status from the worklist and schedule book
	Ordering Facility	Allows adding and editing ordering facilities
	Originating Facilities	Allows entering originating facilities on claims
	Patient Portal Log	Allows viewing Patient Portal activity

Category	Right	Description
	POS Map	Allows creating and editing place of service mappings for POS codes, addresses, and mobile dispatching addresses
	Billing Rules	Allows adding, editing, and deleting billing rules for ordering facilities.
	Provider	Allows adding, editing, and importing resources such as referring providers, reading providers, and technologists
	Provider Group	Allows adding and editing groups of providers
	Provider Organizations	Allows adding and editing provider organizations
	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
	Allow Editing of Display Block Colors	Allows editing the color of blocks on the schedule book
	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

Category	Right	Description
	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 properties to structured reports
	Update URLs	Allows adding and updating Rcopia URLs
	Users Online	Allows viewing which users are currently logged on, and terminating connections
	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 Mgmt.	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

Category	Right	Description
	Copy Profile Settings	Allows copying profile settings from one user to another
	External Apps	Allows configuring Exa PACS/RIS to work with external applications
Viewer Options	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

The following table lists all of the reports available on the Exa platform. Some reports may not be available to you depending on your product and configuration.

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

Category	Report	Description
	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 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
Reports - Schedule & Reports	Daily Schedules	Information on studies performed by day
	Export Completed Studies	CSV export of patient, study, and insurance details for completed or approved studies
	Marketing Rep Activities	Notes and activities that marketing representatives enter about referring physicians
	Unsigned Orders	Orders *not* signed by referring physician. No longer used.

Category	Report	Description
Operations	Cancellation Reason	Statistics on canceled studies with cancellation reason as a key filtering criterion.
	Scheduler Activity	Number of orders (based on the current order status) by time of day that a user ordered, scheduled, rescheduled, or canceled, by facility and date range
	Unfinished Studies	Studies *not* having selected study statuses, by facility and date range
	Referrals Variance	Number of studies referred by referring physicians in the past 13 months, by facility, modality, and month
	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
	Modality Breakdown	Number of studies performed based on CPT or appointment type, by modality
	Technologist Productivity	Number of studies performed per technologist by facility, modality, appointment type, and procedure code
	Peer Review Operational	Progress and results of peer reviews performed
	Fees by Radiologist and Modality	Summary and breakdown of fees for a modality, by radiologist
	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
	Relative Value Units	CPT and RVU totals for reports signed off, by date range
	Referring Physician Study Count	Number of studies referred by referring physicians by date range
	Completed Schedules	Shows information about completed studies
	Monthly/Daily Study Goals	Number of studies performed in the month compared to the goal set in Monthly Goals Setup
	STAT Tracking	Number of studies marked as STAT
	Transcription Study Count	Aggregate study count of reports transcribed by transcriptionists, by facility, modality, and study date
	Insurance vs LOP	Aggregate study count by modality for insurance paid vs letter of protection/personal injury studies
	Marketing Rep Export	Study information, bill fees, and allowed amounts for referring physicians and marketing

Category	Report	Description
		reps
	Audit Trail	Break the glass Audit Trail report
	Same Last Name User Audit	Alberta only.
Patients	Patients Worksheet	Patient and study face sheets in form
My Reports	My Reports	Allows opening the My Reports tab to view operational reports

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.
	Service Code	Type service code for the charge
	Service Description	Type-to-search or select by service code.
	P1…P4	Diagnosis pointers link the diagnosis code to a service. Type the first diagnosis pointer in P1, and then add additional pointers as necessary.
	M1...M3	Enter modifiers as needed
	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 allowed by WCB/insurance for the charge
	Total Allowed	The amount allowed for all charges in the claim
	Auth No	The authorization number for the charge
	Exclude	Select to exclude the charge from an invoice.
Claims	Study Date	Study date, automatically assigned.
	Claim Date	Select the date the claim is issued.
	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.
	Provider Skill Code	Select the provider skill code.

Sub-Tab	Setting	Description
	PHN/ULI	For out-of-province claims, select the registration number issuer type. For in-province claims, select the PHN/ULI issuer type.
	Referring Provider	Select the referring provider. Only the primary contact is available.
	POS Type	Select the place of service code for the service facility.
	Encounter No.	Set to 1 automatically. Change if necessary.
Diagnosis Codes	Select and add all relevant ICD diagnosis codes.	
[section under diagnosis codes]	Pay-to Code	Select the code matching the payee.
	Locum Payment Type	Select to whom, and by what means to submit a locum payment
	Options	**Claimed Amount Indicator**: Select when claiming less than the standard amount for the billed service. **Confidential**: Select if confidential. **Good Faith**: Available if the patient is an Alberta resident but does not have ULI/PHN.
	Newborn Code	For newborns, select the appropriate category.
	Reason for additional compensation/EMSAF	If claiming additional compensation through the EMSAF, type the reason.
	Supporting text	Select preconfigured supporting text, or write new text.
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.
	Address	Type the contact information.
	Policy Number	Type the health number or insurance card 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.
	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.
	Benefit On Date	Availability depends on product version and configuration. Select the benefits start date.

Sub-Tab	Setting	Description
	Verify	Availability depends on product version and configuration. Click VERIFY to verify benefits.
Additional Info	Patient's Condition is Related to:	Select a source of the condition if relevant for insurance purposes.
	Date of Referral	If you selected Employment, select the date of referral, and then select body parts, nature of injury, and orientation.
	Accident State	If you selected a source previously, 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.
	WCB Claim Number	When the WCB is that payer, you must type the WCB claim number.
	Action Code	Select the action code for the claim. Exa PACS/RIS uses the corresponding WCB template when submitting the claim.
Billing Summary	[Amounts]	Totals for fees charged, payments made, adjustments, claim balance, allowed amounts, other payments, and refunds.
	Claim Status	Select a claim status. You can use the status selected here for sorting in the Claims screen. Available statuses differ depending on the payer.
	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.
	Billing Class	Select a pre-configured billing class to flag claims for your own specific purposes.
	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.
	Cheque/Card No.	If the payment mode is "Check," type the check number.
	Apply	Select to apply the payment to the current claim.
	This Pay.	A reference value. Select the Apply button to enter payment information.

Sub-Tab	Setting	Description
	This Adj.	A reference value. Select the Apply button to enter an adjustment amount.
	Payment ID	Automatically assigned serial number for the payment.
NEW PAYMENT	Select to add a new payment.	

See also:
Add codes and other basic data
Configure health service codes

Settings in insurance profile screens

The settings related to insurance profiles are slightly different depending on which of the following screens you use to view them.

1. Edit Study > Insurance Profile > Add
2. Edit Study > Insurance Profile > Edit
3. New Appointment > Insurance
4. Patient > Insurance Profiles > AddEdit

The following table lists all settings that are available.

Setting	Description
Insurance Details	
Set As Default	Available only from the patient chart and when scheduling. Select to set the current policy as the default policy. Useful when the patient has multiple policies at the same level.
Level	Select whether the insurance is the patient's primary, secondary, or tertiary policy.
Inactive	Select to inactivate the policy while retaining its information. The Valid To Date is automatically set to the current date.
Existing Insurance	Not available on all insurance screens. If you entered insurance for the patient previously, you can select it here to automatically fill in other options.
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.
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.
Valid From/To Date	Select the period during which the current policy is effective.
Eligibility & Estimation	

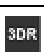
Setting	Description
Available after you save the profile.	
Contact Information	
Relationship	Select an emergency contact person for the patient.
Subscriber Name	Type the name of the insurance policy subscriber.
Sex	Select the sex of the subscriber.
Country	Select the country of the subscriber.
Address	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.

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.

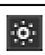
Tool	Name	Function
	3D Ray	Draws a 3D ray on an image. Select to place a vertex on one plane, and the ray extends through the image on all planes.
	3D Cursor	Displays a cursor in other open planes that follows the motion of the cursor in the active plane.
	3D Angle	Click three points to create the angle. The angle appears at the same coordinates on all series with the same frame of reference.
	3D Measure	Click two points (or drag and click). The measurement appears at the same coordinates on all series with the same frame of reference.
	3D Point	Click to add the point. The point appears at the same coordinates on all series with the same frame of reference.
	3D ROI	Available in a future release.
	AR	Plots points to represent angular rotation.

Tool	Name	Function
	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.
	Center Point	Click two points. The center point between them is indicated.
	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.
	Close Series	Keyboard shortcut for the Close Series option in the image cell's upper-right shortcut menu.
	Close Study	Keyboard shortcut for Partial Close.
	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.
	CT Ratio	Displays the angle between two lines. Use to calculate the angle between vertebra.
	Curve	Click two points to estimate curvature from the center of the end vertebrae to the center of the apical vertebrae.
	Cutlines	Shows/hides cutlines, if present.
	Default	Selects the standard pointer tool.
	Delete All Image Annotations	Deletes all annotations.
	Delete Series Annotations	Deletes all annotations in the current series. Available only in shortcut menu.

Tool	Name	Function
	Delete Study Annotations	Deletes all annotations in the current study. Available only in shortcut menu.
	Deselect Last Annotation	Deselects the last-selected annotation. Available only in shortcut menu.
	DICOM Print	Sends the image to a DICOM printer.
	DICOM Values	Displays a list of DICOM values associated with the current image.
	DM Settings	Opens display management settings.
	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 opening an external application.
	Fit to Window	Restores original zoom level.
	Flip	Flips the image across its horizontal or vertical axis (hover over the tool to select between axes).
	Frames	Selects the number and arrangement of frames to display in the viewing area.
	FH Measure	Takes freehand measurements.
	Freehand ROI	Freehand-draws an ROI.
	Histogram	Displays a histogram.
	HO Angle	Draws a horizontal orthogonal angle.
	Horizontal Line	Draws a horizontal line.
	HU	Displays the pixel value in Hounsfield Units.
	Invert Color	Inverts black/white values.
	L Marker	Adds an L (left) marker.
	Line	Draws a straight line.

Tool	Name	Function
	Link Auto	Links two or more series that are open.
	Link Manual	Links user-specified frames between panels.
	M Compare	Measurement comparison. Click a first and second point, then double-click a third point. Displays the distances between the points.
	Magnifying Glass	Displays a movable zoomed area.
	Measure	Measures between two specified points.
	MPR	Multiplanar reformation. Select to generate and display coronal, sagittal, and MIP (maximum intensity projection) stacks from an axial image.
	Next Series	Keyboard shortcut for moving to the next available series in the study.
	One to One	Displays the image in its original DICOM size.
	Open Next Study	Keyboard shortcut for the Auto Open Next Study option.
	Overlay	Turns overlays on/off.
	Pan	Drags the image any direction.
	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.
	Previous Series	Keyboard shortcut for moving to the previous series in the study.
	Print Images	Sends images to a non-DICOM printer.
	Prior Reports	View reports. Turns blue when reports are available.
	R Marker	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.

Tool	Name	Function
	Radial Length	Draws a radial length.
	Rectangle	Draws a rectangle.
	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. Hover over the rotate button to reveal the rotate left button.
	Rotate Left	Rotates the image 90 degrees counterclockwise. Hover over 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.
TKI	Set Key Image	Sets the current image as a key image.
	Settings	Displays the settings dialog.
P	Show Prior List	Opens a dialog with a list of priors that you can select to display in the prior bar.
	Shutter Box	Adds an rectangular shutter.
SHE	Shutter Ellipse	Draws an elliptical shutter.
SHF	Shutter Freehand	Draws a freehand shutter.
	Spine Label	Adds vertebrae labels to spinal images.
	Spine Label Short	Adds vertebrae labels from common starting points.
	Spine Label 3D	Adds vertebrae labels on all series with the same frame of reference.

Tool	Name	Function
	Spine Label 3D Short	Adds vertebrae labels from common starting points on all series with the same frame of reference.
	Spine Label Quick 3D	Adds vertebrae labels to the same anatomy on all series with the same frame of reference.
	Spine Label Quick 3D Short	Adds vertebrae labels from common starting points to the same anatomy on all series with same frame of reference.
	Study Notes	Displays a dialog for reading/writing notes.
	Text	Draws text.
	Toggle Annotations	Shows/hides annotations.
	Toggle DICOM Overlays	Shows/hides DICOM overlays.
	Transcription	Opens an independent dictation and transcription window.
	Triangulation	Displays the context tool at the same coordinates on all series with the same frame of reference.
	Unq	Creates a teaching study.
	Vertical Line	Draws a vertical line.
	Window/Level	Adjusts the window/level.
	Zoom	Zooms the image in/out.

Install and configure tools

Add the Chrome extension

You can add an extension that configures 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, select **CHROME EXTENSION**.
2. On the **Chrome_MultiMonitor** page, select **Add to Chrome**.
   Note: If the **'Add Chrome_Multimonitor?** message appears, select **Add extension**.
3. On the worklist, on the upper toolbar, select the settings button, and then in the button shortcut menu, select **Viewer Settings**.

4. On the **GENERAL** tab, under **Display Settings:**
   a. Select the **Monitors on System** box
   b. Select the refresh button
   c. Select the identify button.
5. 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.
6. Optional. In the **Orders** column, select an item to auto-open in the monitor.
7. Select **SAVE**.

Install Exa Trans

Radiologists who use Dragon for transcription must install Exa Trans.

1. On the burger menu, on the **TOOLS** submenu, select **EXA TRANS**.
   Note: Chrome downloads ExaTransSetup.msi in the lower left corner of the browser. Wait until the download is finished before continuing.
2. Select **ExaTransSetup.msi**. Windows installs Exa Trans.
   Note: If the Windows protected your PC dialog appears, select **More info**, and then select **Run anyway**.

Install Exa Dictation

Radiologists who use Dragon for dictation must install Exa Dictation.

1. On the burger menu, on the **TOOLS** submenu, select **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. Select **exa_dictation_setup.msi**.
3. Windows installs Exa Dictation.
   Note: If the Windows protected your PC dialog appears, select **More info**, and then select **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, select **OPAL TOOLS**.
   Note: Chrome downloads OpalToolsSETUP.exe in the lower left corner of the browser. Wait until the download is finished before continuing.
2. Select **OpalToolsSETUP.exe**. Windows installs Opal tools.
   Note: If the **User Account Control** dialog appears, select **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, select **OPAL VIEWER**.
   Note: Chrome downloads ExaClientViewerSETUP.exe in the lower left corner of the browser. Wait until the download is finished before continuing.
2. Select **ExaClientViewerSETUP.exe**. Windows installs the Opal viewer.
   Note: If the Windows protected your PC dialog appears, select **More info**, and then select **Run anyway**.

Install Exa Scans

With Exa Scans, you can 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.

1. On the burger menu, on the **TOOLS** submenu, select **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. Select **exa_docscan_setup.msi**.
   Note: If the Windows protected your PC dialog appears, select **More info**, and then select **Run anyway**.
3. In the **Welcome to the EXA Document Scan Setup Wizard**, select **Next**.
4. On the **End User License Agreement** page, select **I accept the terms in the License Agreement** checkbox, and then select **Next**.
5. On the **Destination Folder** page, select **Next**.
6. On the **Ready to Install EXA Document Scan** page, select **Install**.
7. If the **User Account Control** dialog appears, select **Yes**.
8. On the **Completed the EXA Document Scan Setup Wizard** page, select **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, select **EXA LAUNCH**.
   Chrome downloads ExaLaunchExtApp.msi in the lower left corner of the browser.
2. Wait until the download is complete, and then select **ExaLaunchExaApp.msi**.
3. If the UAC prompt appears, select **YES**.

Install Exa Tool

Exa Tool is a client side background application that facilitates opening of studies in OrthoView.
Prerequisite: Install local cache.

1. On the burger menu, on the **TOOLS** submenu, select **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, select **SETUP**.
2. Next to the burger button, select the word in all caps, and then select **DICOM.**
3. On the **AE Title** tab, select **Add**, and then enter the following settings.

AE Type	Local Cache
AE Title (Remote)	[Name with no spaces]
Description	[Friendly descriptive name]

4. Select **SAVE**.

Configure the client

1. On the burger menu, on the **TOOLS** submenu, select **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, select **Settings** and select **Local Service Settings**.
4. In the **Rendering Options** screen, under **Prefetch Configuration**, enter the following settings.

Target	Shortcut
AE Title	Type the AE Title (Remote) name that you created in "Configure the server."
User Name	Type a user name with user rights to access studies on the server.
API URL	Type the address of the server hosting the studies that you want to locally cache.
Debug Mode	Select to add additional troubleshooting information to logs.
Disable Oncall	Leave cleared.

5. In the **Rendering Options** screen, under **General Configuration**, 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`)
Study 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.

Target	Shortcut
Max Threads	Type the number of simultaneous threads available to download studies.
Parallel Prefetch	Leave blank.
Cache Disk Usage	Move the slider to set the maximum percentage of hard disk to use for prefetching and local rendering.
Oncall Interval	Type the number of minutes to elapse before checking for new studies to prefetch.
Prefetch Priors	Select to include priors when prefetching.
Enable Skinline Detection	Select to make Skinline Detection available when viewing prefetched studies.

6. Select **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 following figure.

```
    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**, select **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.