Symmetry® PACS

1.4.32_P3

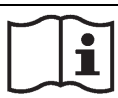
User's Manual

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 system requirements for clients of Symmetry PACS based on typical usage scenarios. For the recommended requirements of your specific implementation, contact your Konica Minolta representative.

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

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

Server

Component	Specification
Processor	Intel® Xeon® Gold 5120 CPU @ 2.20GHz
Physical Cores	14
Memory	31.5 GB
Storage	1.2 TB 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 Symmetry PACS 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.

Getting started

Configure your working environment

Before using Symmetry PACS, 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.

Set up credentials, browser, and monitors

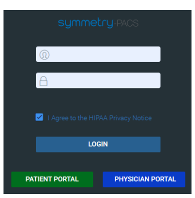
Configure the language in Chrome

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 or a 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 Symmetry PACS, select **LOGIN**.
   - To sign in to a portal, select a portal button.

About two-factor authentication

If your facility purchased two-factor authentication (2FA), administrators can use it to increase security by requiring an additional sign-in procedure. During sign-in, Symmetry PACS 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 Symmetry PACS 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
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 Symmetry PACS in the usual manner.
2. In the **EMAIL VERIFICATION PENDING** box, paste the verification code and select **VERIFY**. Symmetry PACS signs you out.
3. Sign back in to Symmetry PACS, 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, if you prefer, you can use Google Authenticator to sign in in the future 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 Symmetry PACS, 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 Symmetry PACS.
6. In Symmetry PACS, 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 Symmetry PACS 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

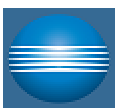
An avatar is an image such as a photo that represents you in various parts of the program.
Prerequisites: Prepare a PNG image to use as the avatar.

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 Symmetry PACS 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.
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 Symmetry PACS

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

1. In Chrome, go to the Symmetry PACS 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 Symmetry PACS 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

Configure Symmetry PACS

This section describes certain core settings that should be reviewed or configured prior to using Symmetry PACS. For other settings, see the following topics.

See also:
Worklist settings
User settings
Viewer settings
Configure the viewer

Set up the office: Companies

Company here means the parent hospital, clinic, or other institution where Symmetry PACS 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 Symmetry PACS 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 add your company to Symmetry PACS:

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, 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 sub-tab. Enter settings in the sub-tab, and then select **SAVE**.
Enable Payment Gateway	Select to turn on the Payment Gateway service, if available, and display the PAYMENT GATEWAY sub-tab. Enter settings in the sub-tab, and then 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.

General settings

Enter the main contact information for your company and other basic settings relating to scheduling, billing, documents, security, image viewing, and peer review.

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.
	NPI No.	Type your national provider identifier.
	Taxonomy Code	Type your NPI taxonomy code.
	Tax ID	Type your national tax ID.
	EDI Submitter ID	If using an EDI service, type your submitter ID.
	EDI Receiver ID	If using an EDI service, type your receiver ID.
	Modifiers in Order	Forces the user to enter modifiers before creating an order.
	ICD9 to ICD10	Select to automatically convert diagnostic codes from the ICD9 to ICD10 standard.
Documents	File Store	Select a file store for scanned documents at your company. This is separate from the file store used by AEs to store images.

Setting	Description	
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.
Email Information	Server Address	Type the address of your outgoing SMTP/mail server.
	Port	Type the mail server port number, provided by your ISP.
	User Name	Type the account administrator user name or email address.
	Password	Type the email account password.
	Sender Address	Type the default sender address (the administrator's email address).
	Email Subject	Type a default email subject to use if no subject is configured on the notification template.

4. Select **SAVE ALL INFO**.

Settings

Settings here means presets that appear as options in other parts of the program, mostly related to people (such as staff and patients).

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, 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).

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

App settings

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

Regarding STAT levels

Because different PACS systems use different STAT levels, you need to translate the STAT level of inbound studies to the STAT levels you configure in Symmetry PACS, and conversely, you need to translate the STAT levels of studies you send to other systems to their STAT levels. To do this, as described in the following table, select the value of the (0040,1003) Requested Procedure Priority tag to translate "from" in inbound DICOMs, and to translate "to" in outbound DICOMs.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, 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 a setting.
5. For each option in the following table, enter settings and then select **SAVE**.

Setting	Options	Description
States	Description	Type states, provinces, prefectures, or other regions used in various parts of the program.
Scan Document Types	Description	Type descriptions to assign to documents to be scanned, such as "Photo ID" or "Explanation of Benefits."
	Requires Review	Select to require review of the document before moving to the next status in the current workflow. See Require document review.
Stat Level	Description	Type descriptions for each of the STAT levels (0–5).

Setting	Options	Description
	Color	Click in the text box, and then use the color picker to select a background color for studies on the worklist having the STAT level.
	Text Color	Select a text color for studies on the worklist having the STAT level.
	Inbound DICOM	Select the requested procedure priority of inbound studies to assign to the STAT level you are configuring.
	Outbound DICOM	Select the requested procedure priority to assign to outbound studies that are in the STAT level you are configuring.
TAT	Description / Colors	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 > [all uppercase menu] > Office > Facility.
Patient Arrival Wait Times	Use the following settings to configure 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.	
	Description	Type a description for the band such as "Short Wait" or "Long Wait."
	Color	Background color for arrivals at the current wait time.
	Text Color	Text color for arrivals at the current wait time.
	Minutes	Type the maximum number of minutes that a patient waits to remain in the band.
Access Reasons	Reasons for accessing confidential patient records when using the Break the Glass function.	
	Code	Type an internal code for the reason.
	Description	Type a name or description of the reason such as, "Direct patient care."
Ordering Facility Types	Description	Type a description such as "Assisted Living" or "Prison."

Reason codes

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

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, select **Office**.
3. On the **COMPANY** tab, on the **REASON CODES** sub-tab, in the left pane, select a category.
4. In the right pane at the bottom, type a reason and select **SAVE**.
5. Optional: To make the reason temporarily unavailable, select **Hide Inactive**.

Setting	Options	Description
Cancel Reasons	Description	Type reasons for such canceling such things as appointments or exams in progress.
Abort Reasons	Description	Type reasons for aborting exams in progress.
Call Categories	Description	Type reasons phone calls, such as to patients for scheduling.
Critical Findings	Description	Type critical findings you can assign to studies, such as "Acute Positive."
Follow-Up Reasons	Description	Type reasons to follow up on a study, such as "Benign but suspicious."
	Code	Type your internal code for the finding.
	Follow Up	Type and select the length of time until the follow-up.
HIE Consents	Description	Type indicators as to whether a patient has consented to release of demographics and medical data through a Health Information Exchange for treatment, payment, and health care operations purposes.
Patient Alerts	Description	Type alerts to assign to patients, such as "Patient is claustrophobic."
Reason for Death	Description	Type reasons for death.
	Color	Assign unique colors to each schedule rule reason for easy identification on the schedule book.
Transportation Reasons	Description	Type modes of transportation such as "Medical Transport" or "Personal Vehicle."

MRN information

MRN information here means your internal format for MRNs. Symmetry PACS can assign MRNs automatically according to the following settings.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, select **Office**.
3. On the **COMPANY** tab, on the **MRN INFORMATION** sub-tab, enter the following settings.

Setting	Description
MRN Type	Select Default to use the default formatting included with Symmetry PACS, 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.

Setting	Description
Fixed Length	Select to specify a maximum length of the MRN.

4. Select **SAVE**.

Accession information

Accession information here means global modifications you want Symmetry PACS to make to accession numbers.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, select **Office**.
3. On the **COMPANY** tab, on the **ACCESSION INFORMATION** sub-tab, enter the following settings.

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

4. Select **SAVE**.

AE filter

This sub-tab is currently unused.

Payment gateway

If you selected **Enable Payment Gateway** previously (see Configure your company):

1. On the burger menu, select **SETUP**.
1. Next to the burger button, on the all uppercase menu, select **Office**.
2. On the **COMPANY** tab, on the **PAYMENT GATEWAY** sub-tab, enter settings to make a payment gateway available, such as PayPal.
3. Select **SAVE**.

LDAP configuration

See Configure all LDAP settings.

RCopia configuration

If you selected **Enable RCopia Service** previously (see Configure your company):

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, select **Office**.
3. On the **COMPANY** tab, on the **RCOPIA CONFIG.** sub-tab, enter RCopia service details.
4. Select **SAVE**.

HL7

This sub-tab is currently unused.

Password management

You can customize requirements for passwords that users create to sign in to Symmetry PACS and other related client apps.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, select **Office**.

3. On the **COMPANY** tab, on the **PASSWORD MGT**. sub-tab, enter the following settings.

<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">Symmetry PACS 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>

4. Select **SAVE**.

Modifiers

Modifiers are codes that provide additional detail to billing transactions.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, select **Office**.
3. On the **COMPANY** tab, on the **MODIFIERS** sub-tab, move to the bottom of the screen, enter the following settings.

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

4. Select **SAVE**.

Set up the office: Other assets

Add a facility

You must add at least one facility to your institution.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, 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.
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]
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.

Setting	Description
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 preorder; and 2) double-clicking a patient in the Patient tab of the New Appointment screen. Days: Type the number of days in the past and future to control which exams appear in the recent schedule screen.
Enable Veterinary Registration	Select to be able to register veterinarians as physicians.
Mobile Rad Dispatching Address	Type the address of the office that dispatches mobile radiology.
Do Not Allow Overlapping Procedures to Be Scheduled	Select to prevent users from scheduling more than one procedure in the same 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 options to specify as mandatory when scheduling an exam.
Study Status When Patient Arrives	Select the status to assign to the study when the patient arrives at check-in.
Study Status When Patient in Room	Select the status to assign to the study when the patient arrives in the exam room.
Report Delay to Patient Portal	Type the number of days to wait before making reports available on the patient portal.
Formal Name	Type the formal name of the facility, if different from the commonly used name.
MRN Information: Inherit	Select to copy the MRN from the EMR of origin.
Other MRN settings	See MRN information.

5. Select **SAVE & CLOSE**.

Add modalities

You must set up each modality available to your facility or institution in Symmetry PACS. 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, on the all uppercase menu, 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, Symmetry PACS 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, on the all uppercase menu, 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.

Setting	Description
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 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, on the all uppercase menu, 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, on the all uppercase menu, select **Office**.
3. On the **TASKS** tab, select **ADD.**
4. Enter the following settings.

Setting	Description
Title	Type a title for the task.

Setting	Description
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.**

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, on the all uppercase menu, 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 preorder instead, or cancel.
Procedure Codes	Select NONE SELECTED, and then use the search bar to find and select one or more procedure codes. The authorization rule only applies to the procedures you select.
Insurance Providers	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.**

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, on the all uppercase menu, 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, on the all uppercase menu, 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, on the all uppercase menu, 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, on the all uppercase menu, 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**.

Configure all LDAP settings

Symmetry PACS supports the LDAP and LDAPS (LDAP Secure) protocols.

Synchronize AD groups

To synchronize AD groups with the LDAP server:

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, 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, on the all uppercase menu, 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**.

Configure providers and resources

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

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, on the all uppercase menu, 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

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, on the all uppercase menu, select **Providers & Resources**.
3. On the **PROVIDER GROUP** 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.
[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 an attorney, 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, on the all uppercase menu, 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 Symmetry PACS provider type.
	Code	Type your internal code for the provider.
	Name	Type the name of the provider.
	Title	Type the academic credentials of the provider (e.g. MD)
	NPI No.	Type the national provider identifier of the facility.
	Taxonomy Code	The Medicare/Medicaid taxonomy code (refer to CMS.gov).
	Dr. Office Name	Type the business name of the provider's office.
	SSN	Type the social security number of the provider.
	Federal Tax ID	Type the federal tax ID of the provider.
	EIN No.	Type the employer identification number of the provider.
	ETIN No.	Type the ETIN to be able to use electronic transfers.
	Medicare UPIN	If the provider has no NPI, type the unique physician identification number of the provider.
	Market	Select the market that the resource serves. All facilities in the Facilities list that are associated with the selected market become selected.
	Facilities	Select all facilities with which the provider is associated.
	Specialty	Select the specialties of the provider.
	License No.	Type the state medical license number of the provider.
	Medicare Provider No.	Type the Medicare provider number of the provider.
	Medicaid Provider No.	Type the Medicaid provider number of the provider.
	Prov. Agreement Code	Type the code for the legal provider agreement code.
	POS Type	Displayed when Referring Provider is selected as the provider type.
	Fee Schedule	Displayed when Referring Provider is selected as the provider type.
	Max TAT	Assign a maximum turnaround time for the provider, in minutes. Symmetry PACS divides this time into 4 segments on the TAT monitor on the worklist.

Tab/Sub-tab	Setting	Description
Locations / Contacts	Code	Type your internal code for the provider.
	Group	Select the provider group to which the provider belongs.
	Email	Type the email address of the provider. This is required to receive email reports, notifications, or attachments.
	Contact Name	Type a contact name, such as the name of the administrative assistant of the provider.
	[Address]	Type or select the country or region and address of the provider.
	Provider Alerts	Type any alerts for the provider, such as "only takes referrals."
	Office Phone/Fax	Type the contact information for the provider's office.
	Mobile/Pager No.	Type the mobile and/or pager number of the provider.
	Phone No.	Type the personal phone number of the provider.
	Fax No.	Type the personal fax number of the provider.
	Primary Contact	Select to send reports to the referring provider only.
Reports to Me/Contact Information	Email Report Link Email Attachment Postal Mail Fax Office Fax	Select to send reports 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	Email	Select to receive notifications by email and/or fax.

Tab/Sub-tab	Setting	Description
	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 Symmetry PACS 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, on the all uppercase menu, 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 Symmetry PACS, 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, on the all uppercase menu, 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 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.

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, on the all uppercase menu, 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, on the all uppercase menu, 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, on the all uppercase menu, 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, on the all uppercase menu, 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**.

Configure procedure codes

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

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

Prerequisites: For adding NDCs to a procedure code, complete the steps in "Configure NDCs."

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, select **Scheduling & Codes**.
3. On the **PROCEDURE CODES** tab, select **ADD**.
4. Enter the following settings.

Setting	Description
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	Type the national drug code associated with the procedure, if any. For a more advanced NDC function, see later steps in this topic.
NDC Measure	Type the unit of measure for contrast and/or liquid medications. The value for this is usually UN.
Color Code	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 the following table, 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.

Setting	Description
Require Physician	Select if the procedure must be performed by a physician.
Require Waiting Time	Select if the procedure requires a waiting time before beginning (such as drinking Barium some number of hours before a procedure).
Notes	Type notes for the procedure as needed.
Duration	Type the expected duration of the procedure.
Default Units	Type the number of procedure units.
RVU	Type or select the relative value units of the procedure for Medicare reimbursement.
Level	The provider level code that determines the pay rate to the radiologist.
Modalities	Select one or more modalities used in the procedure.

7. Optional. For **EXAM PREP. INSTRUCTIONS**, see Configure exam prep instructions.
8. Optional. To add diagnostic codes (other than standard ones already on your system), on the **DIAGNOSTIC CODES** sub-tab, select codes from the dropdown list.
9. Optional. To associate a diagnostic code with the procedure code, on the **DIAGNOSTIC CODES** sub-tab, select a code.
10. 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**.
11. Select **SAVE & CLOSE**.

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, on the all uppercase menu, 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, on the all uppercase menu, 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 study statuses

Workflows in Symmetry PACS 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, on the all uppercase menu, 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 Information	Status Code	Type your internal code for the status.
	Add to Study Shortcut Menu on Worklist	Select to add the status to the study shortcut menu.
	Status Description	Type the name of the status.
	MobileRad Related	Select if the status is for 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 Symmetry PACS validates (checks for inclusion) before moving the study to the next status.
Notification Settings	Email Template	Select templates that determine whether and to whom notification is made when a study arrives at the status.

5. Select **SAVE.**

Configure study flow

Symmetry PACS 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, on the all uppercase menu, 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, on the all uppercase menu, 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 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 Symmetry PACS, on the **HOME** tab, select **Paste**, and then in the button shortcut menu, select **Paste**.

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, on the all uppercase menu, 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.**

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 Symmetry PACS 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 Symmetry PACS, 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 Symmetry PACS. 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 Symmetry PACS and those entities.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, 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 Symmetry PACS 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 Symmetry PACS 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.
Ignore Inbound Stat Value	Select to keep the Stat level of the study from Exa PACS/RIS. Clear to use the Stat level of the study as received.
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).
DMWL Modalities	Select to which modalities to serve a modality worklist.
DMWL Facilities	Select to which facility to serve a modality worklist.
Issuer	Select the issuer of PIDs.
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 Symmetry PACS (the Symmetry PACS 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 in transactions.

Configure a DICOM printer

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

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

Setting	Description
ARTIM Timeout	Type the number of minutes to wait for an acceptance or rejection response to an association request before timing out.

Setting	Description
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 Symmetry PACS 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, on the all uppercase menu, 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 Symmetry PACS and other AEs. For example, you could create a routing rule that tells Symmetry PACS 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, on the all uppercase menu, select **DICOM**.
3. On the **ROUTING RULES** tab, select **ADD.**
4. Enter the following settings. Not all settings are available depending on the type you select.

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 LOCAL_CACHE	Type the number of attempts the program should make to apply the rule.
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.

Setting	Type	Description
		• 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:
6. In the **Field** dropdown list, select an argument
   For example, *Modality*.
7. In the list that appears, select a matching value for the argument.
   For example, in the *Modality* list, select *MG*.
8. Select **ADD TO RULES**.
   Result: In this example, when Symmetry PACS receives an MG study, it automatically sends it to the AE named Remote_Hospital.
9. Optional. Add more criteria.
10. 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, on the all uppercase menu, 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.

Setting	Description
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 Symmetry PACS 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. Symmetry PACS processes each receiver rule in order on a particular computer. Therefore, to improve speed, you can apply different rules on different computers.

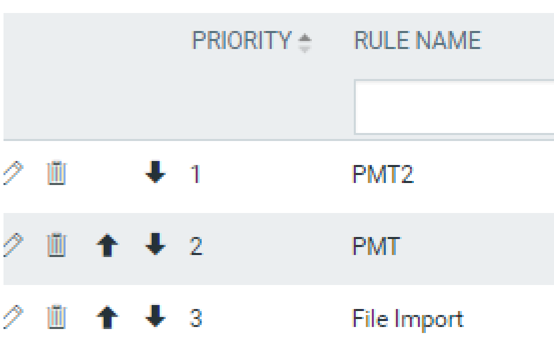
To understand how receiver rules are evaluated and applied, it is helpful to imagine a 4-step process that Symmetry PACS performs for each incoming study.

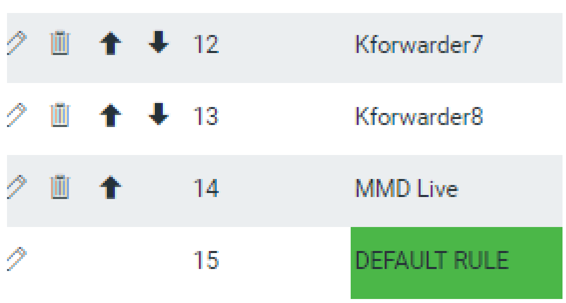
Find a receiver rule that matches the study.
Validate the study against existing PACS studies and/or match it to existing RIS orders.
Process the successes (studies that passed validation and/or matched orders).
Process the failures (studies that failed validation or did not match an order).

A detailed explanation of each of these steps follows.

Step 1 – Find a matching receiver rule

When Symmetry PACS 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.

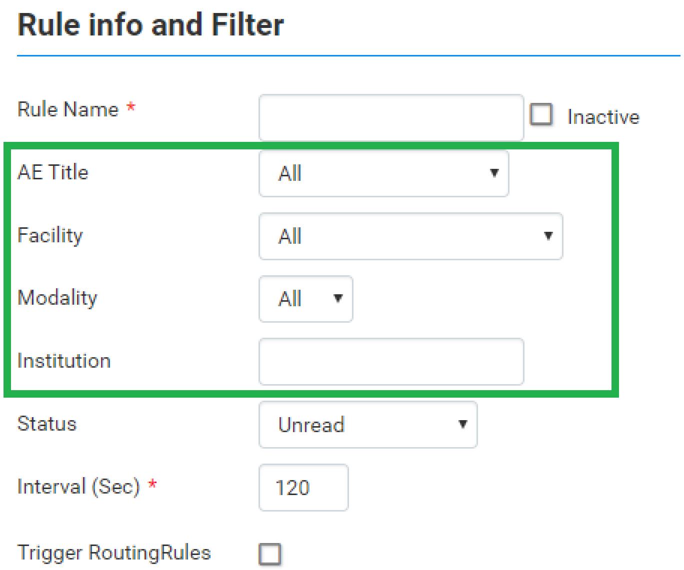




From top... ...to bottom

If no user-defined rule matches, Symmetry PACS 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, Symmetry PACS would not receive it.)

To evaluate whether a study matches a rule, Symmetry PACS 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.

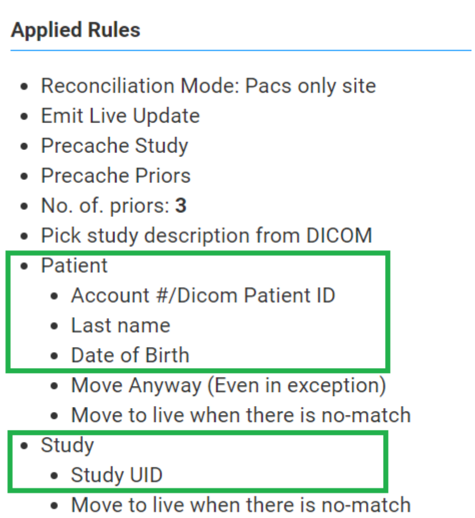


Figure: Applied rules in the PACS ONLY preset.

Symmetry PACS 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. Symmetry PACS 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, Symmetry PACS 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.

Applied Rules

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

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

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

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

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

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

Configure a receiver rule

You can configure receiver rules to tell Symmetry PACS 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, on the all uppercase menu, 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.
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.

Preset Button	Reconciliation Mode	Description
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, on the all uppercase menu, 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.

Manage users

Administrators can configure individual users, user groups, Active Directory, and assign roles (rights) to users. In Symmetry PACS, 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, on the all uppercase menu, 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:
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, on the all uppercase menu, 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, on the all uppercase menu, 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 must be unique, and 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.

Setting	Description
Dragon 360	[reserved, do not select]
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, Symmetry PACS 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, on the all uppercase menu, 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 following steps 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, on the all uppercase menu, 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)**

Setting	Description
	"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, on the all uppercase menu, 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, on the all uppercase menu, 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, on the all uppercase menu, 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 Symmetry PACS. Obtain user account information from the nVoq website.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, 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, on the all uppercase menu, 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 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 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 custom form to a patient record and Add a study 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, on the all uppercase menu, 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.

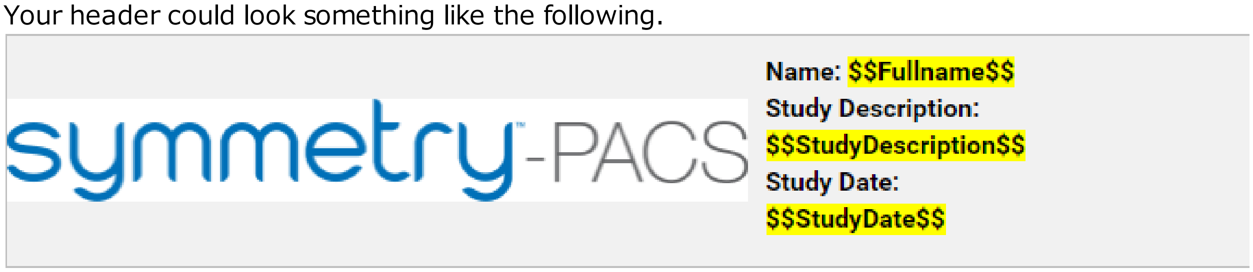
Setting	Description
Document Type	Select a type in order to group forms and make them easier to find.
Viewable on Patient Portal	Select to make the form available from the patient portal and in Patient Kiosk.
Auto Assign to Study	Select and then enter criteria for studies to which to automatically assign 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	Yes1	No	1 line	Yes	Yes
Text Area	No	No	Yes	1 line	No	No
Free Text	Yes2	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 fields 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** 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, on the all uppercase menu, 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, on the all uppercase menu, 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 .

Set up a custom form

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, 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.
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, on the all uppercase menu, 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, on the all uppercase menu, 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 Symmetry PACS 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 following table 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 in this topic 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, on the all uppercase menu, 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 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, Symmetry PACS automatically sends exam results and reports to the referring provider locations/contacts you modify.

Prerequisite:
Administrators must configure the company's email server (see 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 in this topic 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, on the all uppercase menu, 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

Set up sending of notifications

By completing the following tasks, Symmetry PACS automatically sends status change email notifications to the referring provider locations/contacts you modify.
Prerequisite:
Administrators must configure the company's email server (see 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 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, on the all uppercase menu, 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, on the all uppercase menu, 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**.

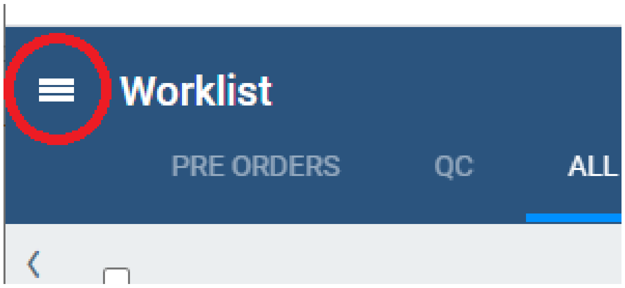
View logs

To view the various logs that are available in Symmetry PACS, do the following.

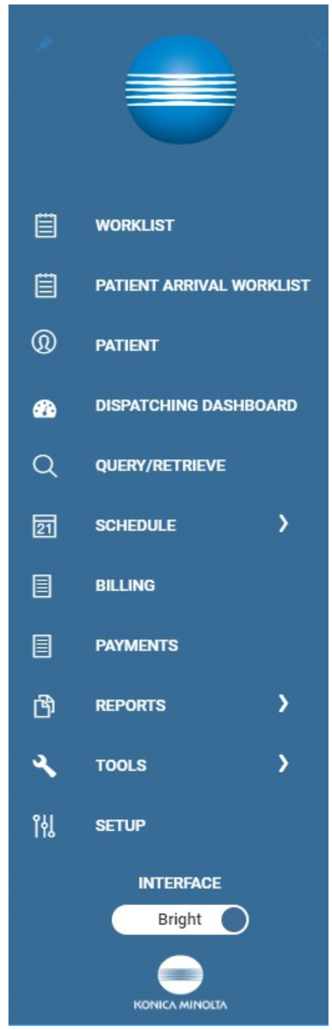
1. On the burger ☰ menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, select **Log**.
3. Enter information as needed in the following tabs (AUDIT LOG, USER LOG, etc.).

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.



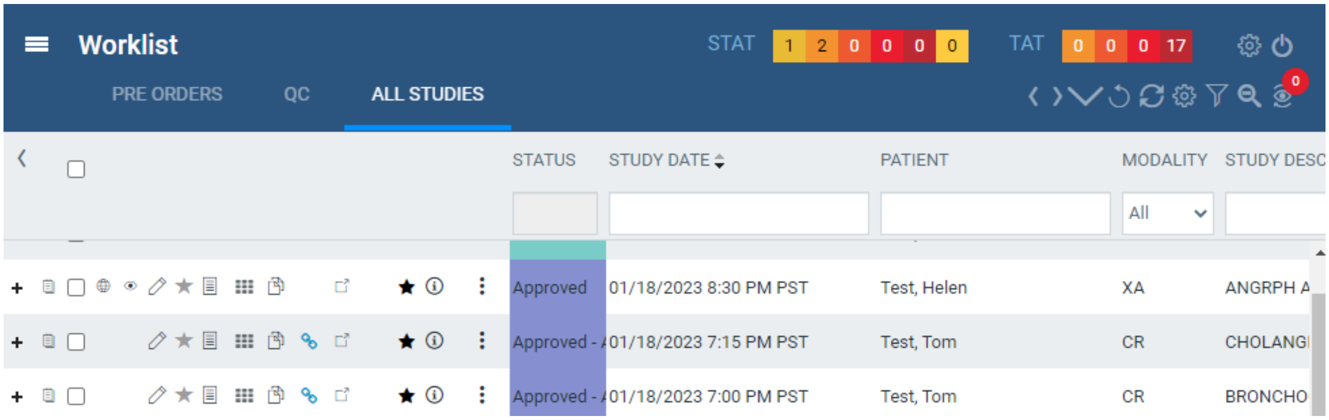
The burger menu button...



...and menu (your options may vary)

Work with the worklist

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



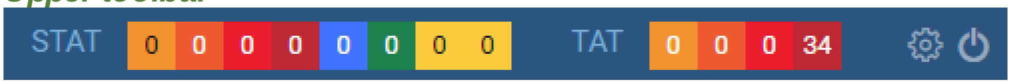
See also:
[Worklist settings]
[Use the worklist]
[User settings]
[Viewer settings]
[PACS Actions menu]
[Worklist shortcut menus]

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

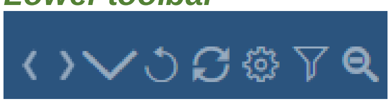


1 2 3 4

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

1	**STAT meter**	Shows the number of studies at each STAT (urgency) level.
2	**TAT meter**	Shows the number of studies at each TAT (turnaround time).
3	**Settings**	Opens the settings menu.
4	**Log off**	Logs off the current user.

Lower toolbar

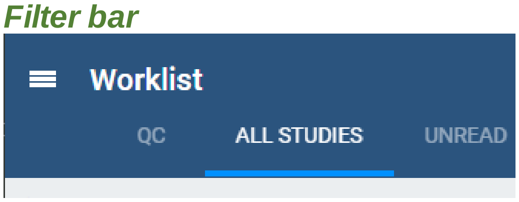


1 2 3 4 5 6 7

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.

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)	**QC**	Lists studies needing reconciliation.
User Filters (Can be hidden)	[*user defined*]	Provide a highly customized view of the worklist.

Type	Name	Description
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

Symmetry PACS 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.
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 preorders.
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.

Setting	Description
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.

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 (Symmetry PACS only).
Auto-Open Appointment Confirmation	Select to automatically open the appointment confirmation screen after selecting the CREATE ORDER button (Symmetry PACS only). This screen provides a convenient summary to read to the patient on 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 Symmetry PACS 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
View approved reports

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.

See also:
View approved reports

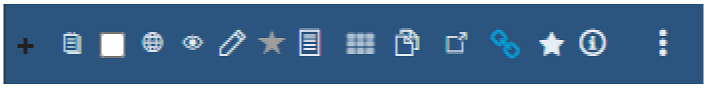
View series and images

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	Select to display 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.
	View Transcription	Opens the dictation and transcription editor. See "Dictation and transcription."
	Multipanel	Opens the study in the multipanel, 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.
	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 Symmetry PACS 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).

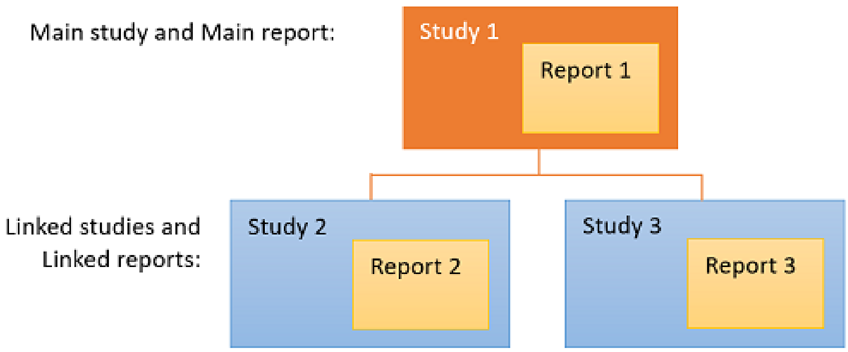
See also:

Work with the Symmetry PACS viewer
Edit study screen
Worklist shortcut menus
Configure opening of a third-party program

About Linked Reporting

With *Linked Reporting*, radiologists can save time by dictating multiple related studies into a single report. When the report is approved, all of the linked studies move to the Approved status automatically. When you open an approved report from any of the linked studies (studies 1, 2, or 3 in the figure below), you see the same combined report so that all information is available to you regardless of the study or report you open.

Linking reports also links the studies containing those reports, so that all studies follow the main study in terms of STAT levels, study statuses, and report approval statuses. For example, if the main report moves to the Dictated status, so do its linked reports. If you later decide to unlink a report, those statuses revert to their previous states (with exceptions, see Details on Linked Reporting).



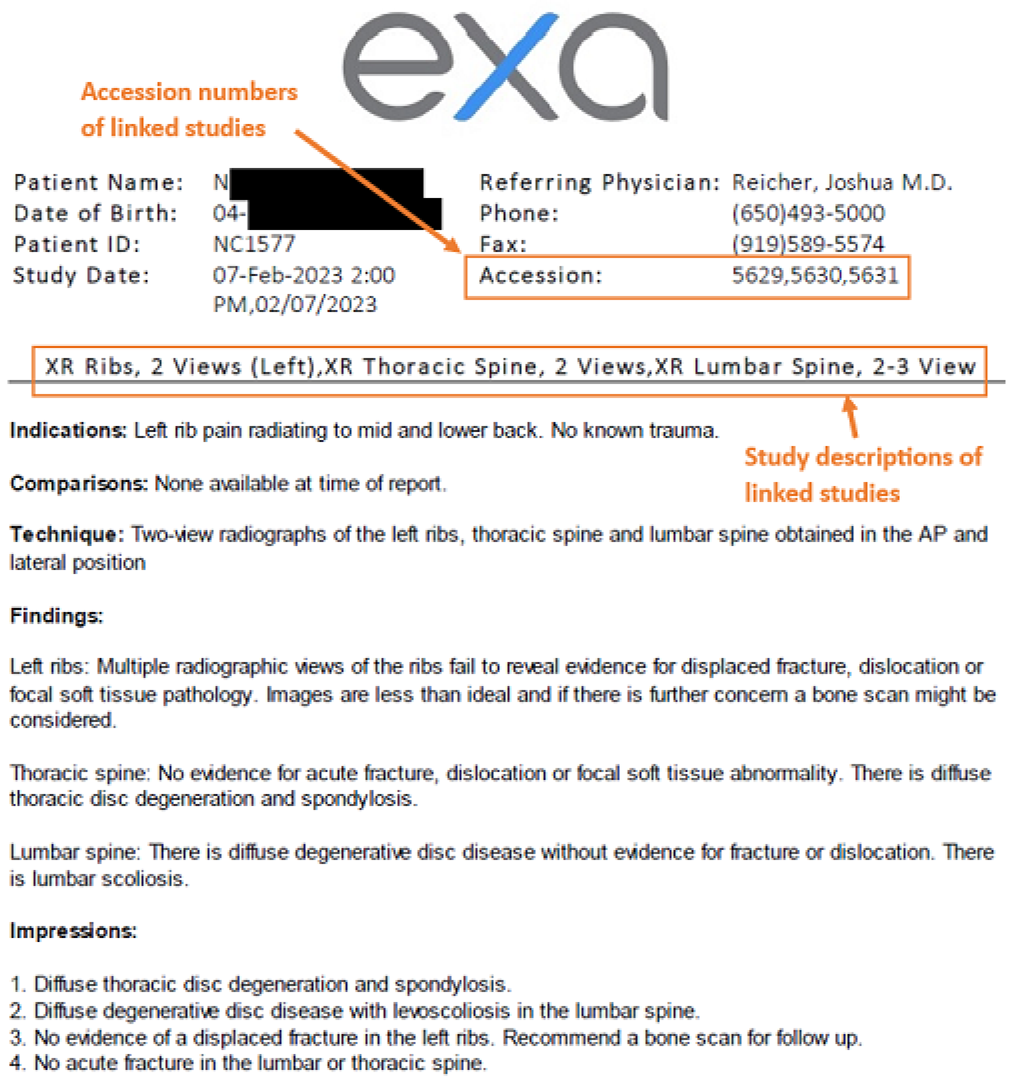
Once linked, Reports 1, 2, and 3 become one combined report

Note
- You can link reports any time before approval.
- You can unlink reports at any time.
- You cannot link a report that is already approved.
- If an addendum is added to a linked report, it applies to all linked studies, and is available for viewing from any linked study.

What do linked reports look like?

Based on the merge fields you include in your report templates, Exa PACS/RIS automatically fills the header with information about the main report and its linked reports. (Due to space constraints, some fields only display information from the main report, such as the referring physician.) The body of the report contains the radiologist's findings for the main study and all linked studies.

Here's an example of a linked report:



Patient Name:	N[redacted]	Referring Physician:	Reicher, Joshua M.D.
Date of Birth:	04-[redacted]	Phone:	(650)493-5000
Patient ID:	NC1577	Fax:	(919)589-5574
Study Date:	07-Feb-2023 2:00 PM,02/07/2023	Accession:	5629,5630,5631

XR Ribs, 2 Views (Left),XR Thoracic Spine, 2 Views,XR Lumbar Spine, 2-3 View

Indications: Left rib pain radiating to mid and lower back. No known trauma.

Comparisons: None available at time of report.

Technique: Two-view radiographs of the left ribs, thoracic spine and lumbar spine obtained in the AP and lateral position

Findings:

Left ribs: Multiple radiographic views of the ribs fail to reveal evidence for displaced fracture, dislocation or focal soft tissue pathology. Images are less than ideal and if there is further concern a bone scan might be considered.

Thoracic spine: No evidence for acute fracture, dislocation or focal soft tissue abnormality. There is diffuse thoracic disc degeneration and spondylosis.

Lumbar spine: There is diffuse degenerative disc disease without evidence for fracture or dislocation. There is lumbar scoliosis.

Impressions:

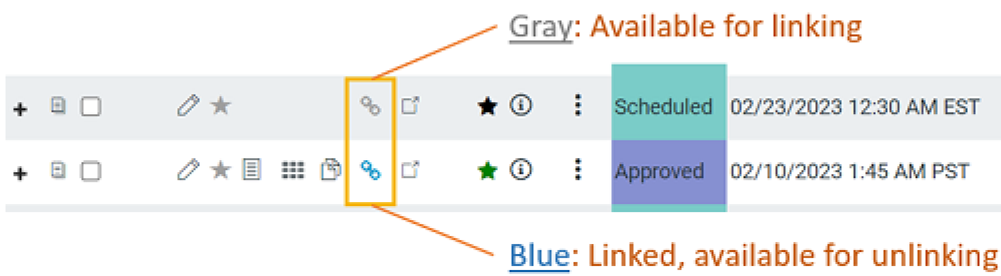
1. Diffuse thoracic disc degeneration and spondylosis.
2. Diffuse degenerative disc disease with levoscoliosis in the lumbar spine.
3. No evidence of a displaced fracture in the left ribs. Recommend a bone scan for follow up.
4. No acute fracture in the lumbar or thoracic spine.

Link reports

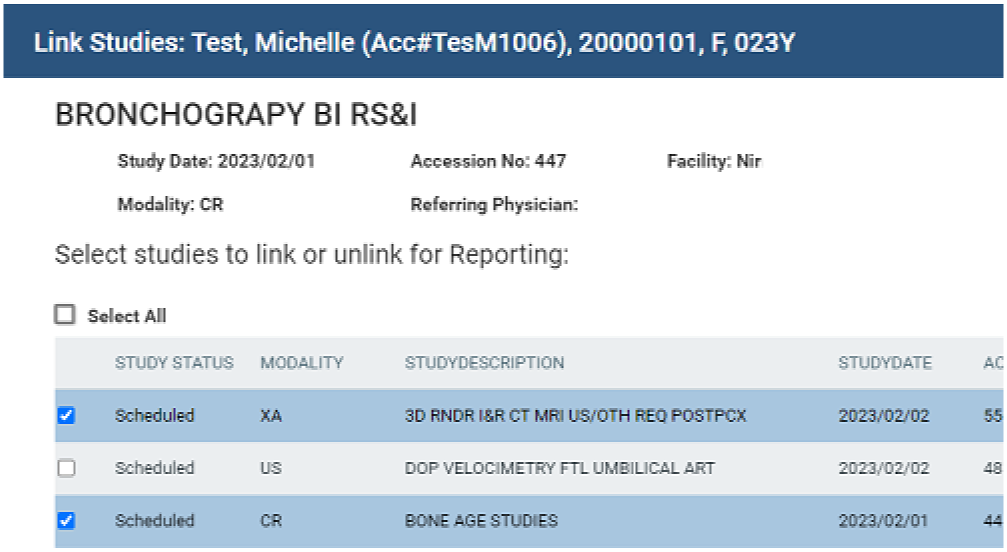
To link reports:

Prerequisite: Obtain the Link Report user right from your administrator.

1. On the worklist, find a study that is available for linking, and select the gray link button.



2. In the **Link Studies** dialog, select the studies whose reports you want to link to the main report.



3. Select **SAVE**.
   Result: The reports and studies are now linked.

See also:
About Linked Reporting
Unlink a report
View approved reports
Details on Linked Reporting

Unlink a report

To unlink a report:
Prerequisite: Obtain the Unlink Report user right from your administrator.

1. In the worklist, find a main or linked study (studies with the blue **Linked Studies**  button), and select the button.
   Result: Whether you chose a main or linked study, the **Link Studies** dialog opens with the main study shown at the top with its linked studies listed below it.
2. In the **Link Studies** dialog, clear the checkboxes of the studies whose reports you want to unlink from the main report.
3. Select **SAVE**.

See also:
About Linked Reporting
Link reports
Details on Linked Reporting

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

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
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.

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).

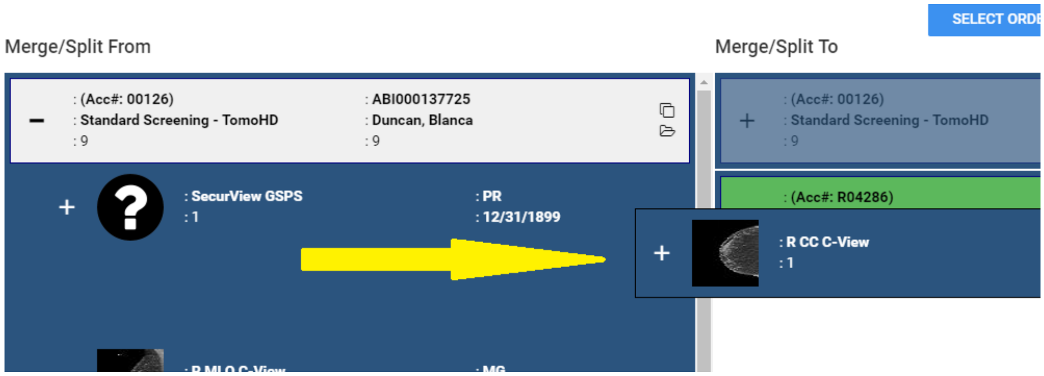
1. In the worklist, select two studies of the same patient to compare.
2. On the lower toolbar, select the settings button, and then in the **PACS ACTIONS** menu, select **Compare Study**.

Merge or split studies

In Symmetry PACS, *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

Symmetry PACS and Symmetry PACS have a study shortcut menu (for studies in the Unread and later statuses). Additionally, Symmetry PACS 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 item, such as a study or order row.

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 App settings).
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.

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 steps in the following topics.

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**.

Assign a study to users

You can assign one study to one or more users (such as a radiologist). When the user signs in, they can create a filter of the worklist that displays all studies assigned to them. This feature also works in conjunction with the “Show assigned studies only” option under Setup > User Management > [user profile] > WORKLIST FILTER.

1. On the worklist, 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 from the list 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. Select **SAVE.**

Add studies to the merge queue

You can add studies to a merge queue from the worklist, and then merge or split them by following the procedures in Merge or split studies.

1. In the worklist, 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 Symmetry PACS 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: Symmetry PACS 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 Reason codes).

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. In "Configure your company," see Settings.

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.

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 Symmetry PACS 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.

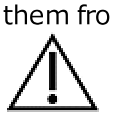
About linking patients

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 Symmetry PACS), 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**, browse for and select 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. Symmetry PACS 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**, browse for and select a file, and then select **Open**.
4. Select **SAVE.**

Scan to an order or study

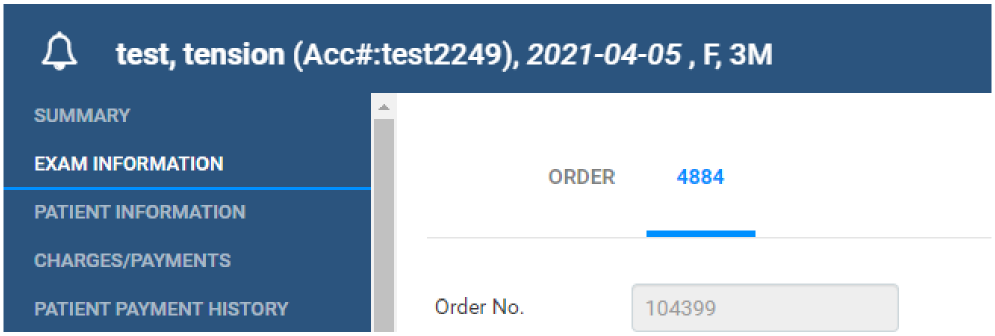
You can scan an image to a DICOM file and attach the file to one or all studies in an order. On the worklist, on a study shortcut menu, do one of the following.

- 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 Symmetry PACS 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).
Modality Room	The modality room where the study is performed (to change, reschedule).
Reason	Type the patient-specific reason for performing the study.
Study Notes	Type or select study notes (such as basic study history or notes from technologist to radiologist).
Diagnosis Codes	Select diagnosis (e.g. ICD10) codes for the study.
Referring Physician	Select the physician who referred the patient for the study.
Ordering Physician	Select the physician who ordered the study. If left blank, Symmetry PACS 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.**

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 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 in Approved status.
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 multipanel 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 multipanel.

See also:
Dictation and transcription with WebTrans
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 App settings).

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.

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.**

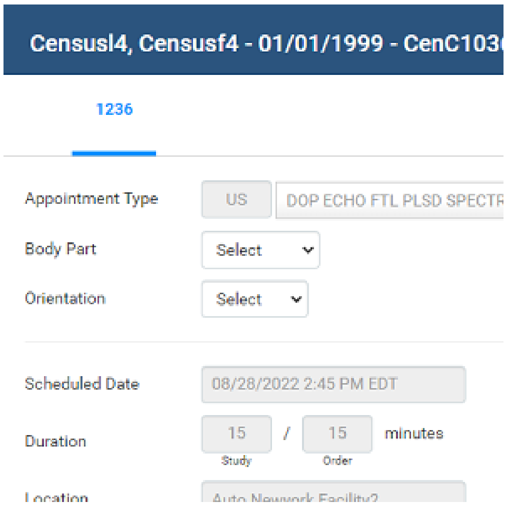
View activity logs

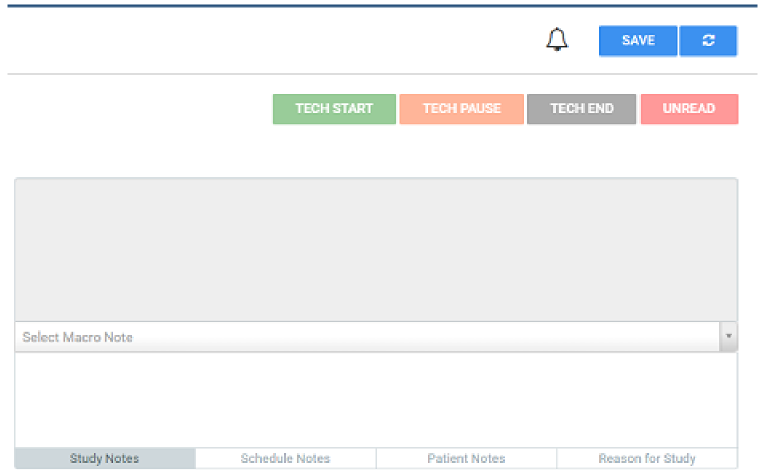
You can view a log of program activity and export the log to Excel.

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:
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 Symmetry PACS 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).

7. Select **SAVE**.

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 Symmetry PACS 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 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 Symmetry PACS, 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 Symmetry PACS.

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.
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. To dictate multiple studies at once, see About Linked Reporting.
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."
Select [word] through [word]	Selects a range of words **Example**: Say, "Select food through department" to select the phrase "food and beverage department."

Command	Description
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).

See also:
Add a transcription template

Edit and approve transcriptions

You can edit and approve saved transcriptions.
Note: If approving a main study, any activity related to TAT recording affects any of its linked studies (see About Linked Reporting).
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.
   Symmetry PACS 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**.
   Symmetry PACS reverts the status of the dictation from Approved to Transcribed.

Dictation and transcription with WebTrans

You can dictate findings in Exa Dictation and transcribe them in Web Trans. Web Trans features a multipanel 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 WebTrans

Depending on your installation configuration, you must turn on Exa Dictation and Web Trans before using them by following these steps:
Prerequisite: Install Exa Dictation.

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

The Web Trans 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 WebTrans

The WebTrans window contains dedicated panels for managing transcription, notes, documents, and prior reports.
Prerequisite: Turn on Exa Dictation and WebTrans.

1. In the worklist, find an unread study and select its multipanel transcription button.
2. In the WebTrans multipanel, 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 WebTrans screen to reposition them.

Edit and approve transcriptions in WebTrans

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

Note: If approving a main study, any activity related to TAT recording affects any of its linked studies (see About Linked Reporting).

Prerequisite: Turn on Exa Dictation and WebTrans.

1. On the worklist, in the relevant study row, select the multipanel 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 WebTrans

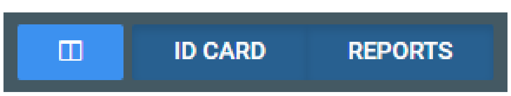
You can add study notes and reasons for study in the Notes panel of WebTrans.

1. On the worklist, in the relevant study row, select the multipanel button.
2. In the multipanel, 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 WebTrans

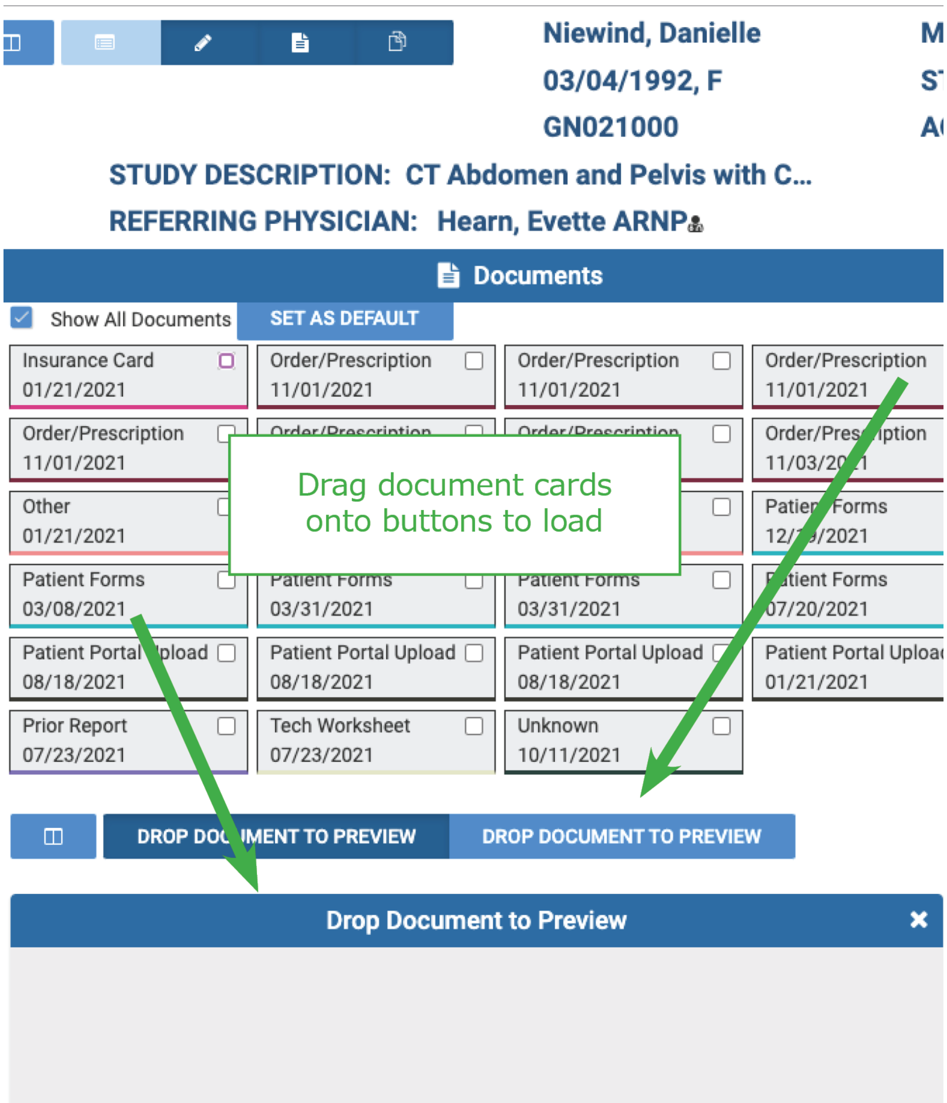
You can view all documents attached to a study in the Documents panel of WebTrans. The Documents panel displays up to two documents at once, and you can select which documents to display.

1. On the worklist, in the relevant study row, select the multipanel 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 WebTrans

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

1. On the worklist, in the relevant study row, select the multipanel 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 Symmetry PACS 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 WebTrans.

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. If approving a main study, any activity related to TAT recording affects any of its linked studies (see About Linked Reporting).

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."
   Symmetry PACS 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**.
   Symmetry PACS reverts the status of the dictation from Approved to Transcribed.

About using Exa Trans and WebTrans

Exa Trans and WebTrans (with the multipanel) 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 WebTrans
WebTrans rights assigned	WebTrans 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 multipanel 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 multipanel in monitor 1.
Exa Trans and WebTrans enabled within Auto Open Orders	Exa Trans and WebTrans 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 WebTrans not enabled in Auto Open Orders	Only Exa Trans opens when a study opens (but you can still manually open WebTrans).
Set Exa Trans or WebTrans to open on a specified monitor	Manually opening Exa Trans or WebTrans opens it in the specified monitor.
WebTrans set to auto open in Auto Open Orders, but not Exa Trans	WebTrans auto opens when the viewer is opened, in the specified monitor, if so configured.
User selects the Exa Trans or WebTrans button on the worklist	Exa Trans or WebTrans 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 WebTrans Esign & Approve	Exa Trans closes, WebTrans minimizes or closes
Exa Trans and WebTrans Approve & Next	Study status changes to Approve, viewer, Exa Trans, and WebTrans open with the next available study
Exa Trans and WebTrans Not Approve	Study status changes to Not Approved, viewer, Exa Trans, and WebTrans minimize or close.
Exa Trans and WebTrans Skip	Study status remains Unread, the viewer, Exa Trans, and WebTrans open the next available patient or study.
Exa Trans and WebTrans Save	Viewer, Exa Trans, and WebTrans remain open. If the user closes the viewer, Exa Trans and WebTrans also close.
Exa Trans and WebTrans Pre Approve	Study status changes to Pre-Approved, viewer and WebTrans close.

QC operations

All DICOM studies from other AEs initially appear on the QC tab, and are automatically evaluated for conflicts with PACS studies, RIS orders, and other data based on user-defined receiver rules. 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 Symmetry PACS viewer

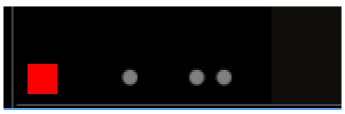
Standard viewing tasks

Open a study in a viewer

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

- To open in the Symmetry PACS viewer, select the button of a study.
- To open in the Opal viewer, select the button of a study.
- Configure Symmetry PACS 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 priors and prior reports

From the Exa PACS/RIS viewer, you can open priors from a list, open then from the prior bar, and open prior reports.

Open a prior from a list

1. On the viewer toolbar, select the **Show Prior List** button to open the list.

   Other Patient Exams

   Prior Patient Exams

O	R	M	Description	Referring	Exam Date	Status
	R'	US	DOP VELOCIMETRY FTL UMBILICAL ART	Test, Referring	01/19/2023 11:15 AM	Approved
	R*	US	DOP ECHO FTL SPECTRAL DISPLAY COMPL	Test, Referring	01/19/2023 11:00 AM	Approved

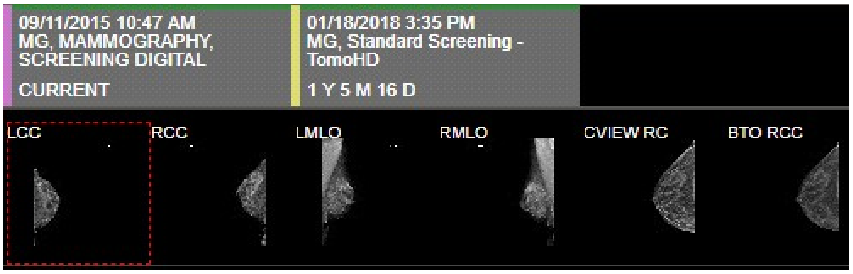
   If an **R** appears in the R column, the prior includes a report. If the priors are linked:

   R' The report is the main report.
   R* The report is a linked report (linked to the main report).

2. In the list, double-click a prior to open it in the viewer.

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).

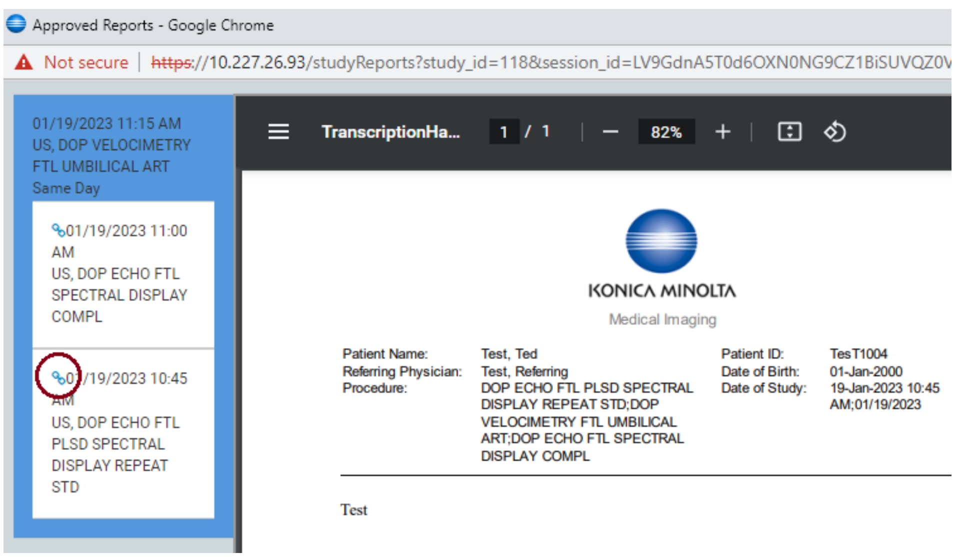


The Prior bar contains the current and prior studies on the top row, and their image thumbnails on the bottom row (see figure). The study boxes show the age of the study, and depending on configuration, let you do one or more of the following:

- 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.

Open a prior report

1. On the viewer toolbar, select the Prior Reports R button.
2. In the **Approved Reports** screen, on the left pane, select a prior report.
   Result: The report appears in the right pane (may take time to load).
   Note: If reports are linked, the link symbol appears (in the red circle in the figure).



About viewing CAD findings

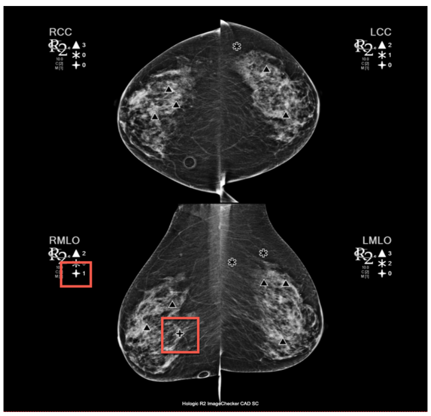
The Exa PACS/RIS viewer automatically displays image markers contained in SR data from supported manufacturers such as iCAD, DiA, Hologic (Malc findings, see below), and CureMetrix (such as the CureMetrix mammography calcification and density markings). To control which markings to display, select options in the SR CAD list (see Configure mammography).

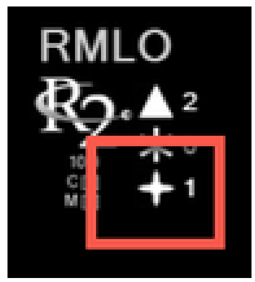
Exa PACS/RIS uses tracking IDs in the SR data to ensure that when you click a 2D/synthesized image annotation it jumps correctly to the corresponding 3D/BTO image. Additionally:

- 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.

Hologic Malc findings

Hologic ImageChecker CAD has a finding type called a Malc, which is a combination of one mammography breast density and one calcification cluster. When Malc findings are present in a CAD SR, the Exa PACS/RIS viewer displays them as a “compass” shape. The center point marking of the compass is determined by the center point of the child breast density. The total count of Malc findings appears in the top overlay next to the count for densities and calcifications.





The Malc “compass” marking and count

See also:
[Configure annotation colors]
[View studies with CAD findings]

View studies with CAD findings

The Exa PACS/RIS Viewer supports 2D CAD findings for mammography and 3D tomographic series. Findings are displayed as overlays. To view CAD findings:
Prerequisites: Configure mammography (especially SR CAD options)

1. Open a study containing CAD findings in the Exa PACS/RIS viewer.
   Result: The CAD button becomes available.
2. Select the CAD button, and then select findings to show.

   Example: **Calcification Clusters(3)** > **Show**
3. Optional: 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.

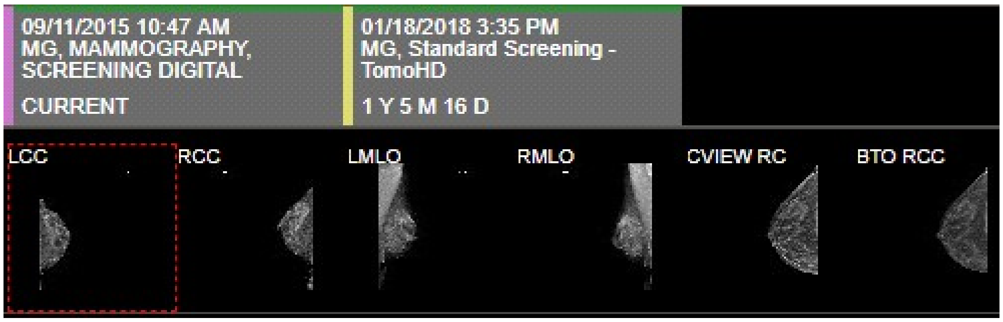
CAD-related keyboard shortcuts

To easily move through series that include 3D CAD findings, you can use keyboard shortcuts (see Assign toolbar keyboard shortcuts). For example, you can use a keyboard shortcut to jump to the next finding in a BTO study, or turn Malc markings on and off.

See also:
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 multiframe 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 Symmetry PACS 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.

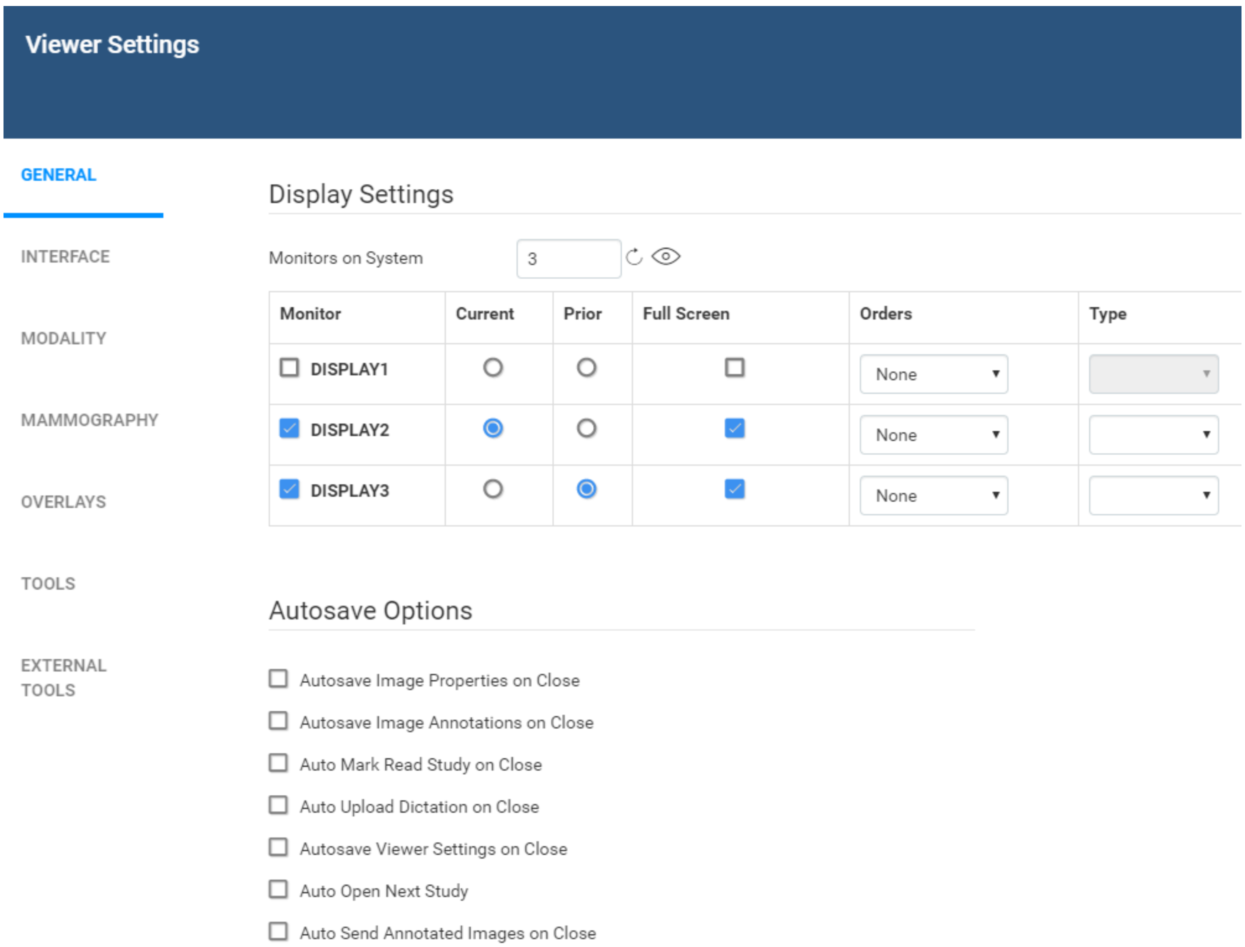
Setting	Description
W/L (Default)	Select to print the image with its original window/level settings. Clear to select the current window/level setting.
Overlay Text	Select to include the DICOM overlay (as per-image detail), or clear to exclude.
Selected Image Selected Series Current Page All Images	Select to print the selected image, selected series, current page of images, or all images.
Prev / Next	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 Symmetry PACS viewer, in the upper toolbar, select the setting button.



Set up connected displays

Configure all connected monitors that you intend to use with Symmetry PACS. 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: Add the Chrome extension.

1. In the Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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, in milliseconds.
Lag (0–5000)	Delays the response after selecting play or record by the specified amount of time, in milliseconds.

4. Select **SAVE.**

Show or hide tool buttons

You can hide certain tool buttons.

1. In the Symmetry PACS 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.**

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 Symmetry PACS viewer, in the upper toolbar, select the setting button.
2. In the **Viewer Settings** dialog, in the left pane, select **MODALITY**.
3. In the modality list, 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.
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.

Section	Setting	Description
	Auto Hang DM	Makes the use of DMs available. Makes the first instance on the DM preview available to hang on the viewer.
	Auto Hang Priors	Automatically loads the first prior when the viewer opens. Works in conjunction with Auto Open Priors.
	Auto Replace Priors	Automatically replaces prior images in the current layout.
	Auto-Invert SC Images	Inverts white and black of scanned documents such as reports. Reduces eye fatigue.
	Auto Next Series	When moving beyond the last image of the current series, automatically opens the next series.
	Auto Next Series Cine	Automatically starts cine play of the next series when the user opens it.
	Auto Next Series Wrap	Automatically opens the first series after viewing the last image of the last series in a study.
	Auto Next Study	Automatically opens the next study in the worklist after closing the current study.
	Auto Swap Red/Blue	Inverts colors that may not be displayed from the modality properly (such as with non-DICOM ultrasounds).
	Auto Show DICOM Overlays	Automatically displays DICOM overlays, if present.
	Auto Show SR Overlays	Automatically displays SR overlays, if present.
	Auto Show Cutlines	Automatically displays cutlines, if present. Note, this setting also applies to synthesized mammogram views, in which the cutlines indicate the position of the currently viewed image on the corresponding BTO view.
	Auto Show Cine	Shows the media control bar when a series is opened.
	Auto Show W/L Bar	Shows the window/level bar when the viewer opens.
	Detect Pixel Padding	Turns detection of pixel padding ON/OFF.

Section	Setting	Description
	DM Allow Missing Cell	Shows a blank cell in the DM if the assigned image is not available.
	DM Save W/L	Saves the window/level with the DM.
	Save Study DM on Close	Creates a new DM for each study when it closed, or when the next study auto-opens. The DM is named with the accession number, and contains the last displayed stack and monitor position.
	Show PDF in Last Stack	Moves PDF files to the last place in the stack: in the viewer, they are loaded last, if an empty cell is available.
	Instance Window/Level	Shows each image with its own W/L, rather than using the W/L of the first instance.
	Do Not Skip Images	Prevents scrolling forward if subsequent images are not yet loaded.
	Ignore Frame of Reference within Study	Disables referencing of the study's DICOM frame of reference UID when performing linking and cutline functionality.
	Ignore LUT	If LUT values are corrupted, Symmetry PACS 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.

Section	Setting	Description
	Pre-generate Bitmaps	Pre-generates bitmaps automatically if imported into PACS.
	Reset W/L for Individual Images	Select to use the original W/L of each individual image. Clear to use the first W/L sent by the modality for all images. Frequently used to optimize MRI images.
	Select Last Contrast Entry	When DICOM tags include multiple W/L values, uses the last value for all images in the series. Clear to use the first value.
	Show 3D Spine Labels	Shows the 3D spine label tool on the toolbar.
	Show 'Bone Enhance' on Toolbar	Shows the Bone Enhance tool on the toolbar.
	Show DM Toolbar	Shows/hides the DM toolbar on initial load.
	Show Spine Labels	Shows the spine labels tool on the toolbar.
	Sort Thumbnails by Date/Time	Sorts thumbnails by date/time.
	Stop Thumbnail from Updating	Prevents W/L changes to the current image from affecting its thumbnail.
	Stretch Across Monitors	Turns on extending of items across multiple monitors.
	Cine Direction	Sets the cine playback to forward or backward.
	Default FPS	Causes cine play to occur at the default frames per second, depending on modality.
	Enable 4DM	Opens the 4DM viewer for post-processing. (Requires configuration to integrate with the 4DM viewer.)
	Disable CINE Scrolling	Disables cine play of series.
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.

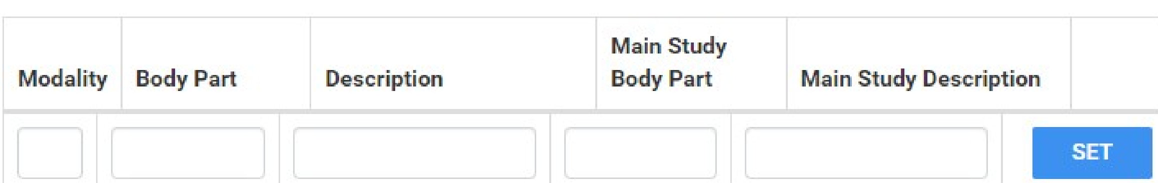
Section	Setting	Description
	Isolate MPEG	Splits by MPEG file.
	Isolate Multiframe	Splits cine loops into multiple images.
Premium View	Bone Enhance	Displays the contrast enhance menu.
Auto Bone Enhance		Highlights the bone portions of images.
Auto WL Type		Selects the default W/L to use for the selected modality.
Auto Reorder Images		Automatically changes the order of images in a series to the selected order.
Prior Options	Auto Open Prior	Automatically opens prior studies.
	Relevant Priors	When automatically opening priors, also opens relevant priors from other modalities. See “Advanced options for displaying relevant priors.”
	Auto Open Prior Count	When automatically opening priors, opens the selected number of studies.
	Force Relevant Only	Opens only relevant priors based on modality, body part, and description.
	Prioritize Current Modality First	When opening relevant priors, display same-modality priors first.

5. 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 overlays

You can configure the appearance and contents of overlays.

1. In the Symmetry PACS 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 multiframe 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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 Symmetry PACS 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).

Setting	Description
Arguments	Type arguments to pass to the command at runtime. Symmetry PACS 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).

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.

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 move to images and points in 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 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 MPR ▾ button.

  Note: The plane of the base image determines the default MPR plane.

Handle MPR images

You can handle 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 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.
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

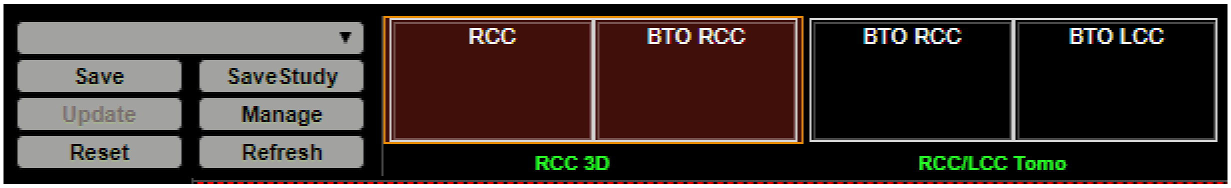
Display images with a DM

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).

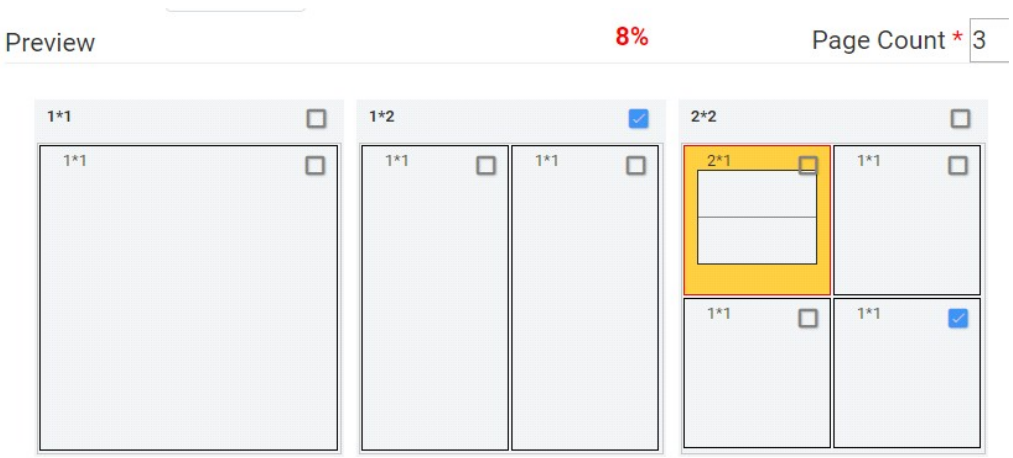


Figure. In this example, 3 pages (monitors) are configured, with 1, 2, and 4 cells added to each page, respectively. On the second page, Allow Missing Cells is selected at the page level, which means that either the left, right, or both cells can be blank. On the third page, the study will hang if images 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, Symmetry PACS 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 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.

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 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**.

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, Symmetry PACS 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.

Setting	Description
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**.

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. Open a study in the viewer 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, on the all uppercase menu, 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, on the all uppercase menu, 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, on the all uppercase menu, 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 Symmetry PACS 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.

Symmetry PACS 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

Work with the patient chart

Symmetry PACS 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.

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 App settings).

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.

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 preorders 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 Symmetry PACS 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 Symmetry PACS 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.

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

Setting	Description
Reason for Death	If the patient is deceased, select the checkbox and then select the reason for death in the dropdown list.
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 following table, 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	
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. Symmetry PACS will validate all future account number entries against your regular expression.

1. On the burger menu, select **SETUP**.
2. Next to the burger button, on the all uppercase menu, 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, on the all uppercase menu, 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, on the all uppercase menu, 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 Symmetry PACS. If the patient already exists in Symmetry PACS, 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, Symmetry PACS 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 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 in the following sub-topics to install the Mobile RAD app on their Android mobile device. If you do not have access to the SETUP area of Symmetry PACS, request assistance from an administrator.

Configure Symmetry PACS

1. In Symmetry PACS, 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 Symmetry PACS, 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 Symmetry PACS, 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 Symmetry PACS.
Password	Your password for Symmetry PACS.
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 Symmetry PACS 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 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**).

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 Symmetry PACS 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.
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.

Work with tools

Symmetry PACS 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: Symmetry PACS 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 Symmetry PACS. You must reconcile that information to the patient's existing chart, or use it to create a new chart.

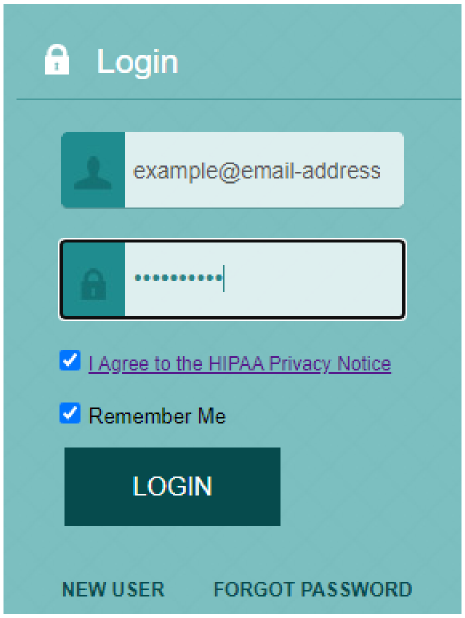
1. On the burger menu, select **PORTAL REG USERS**.
2. On the **Portal Registered Users** screen, open a user of Verified status.
3. In the **Portal Registered Information** screen, in the **Patient Match** area, search for a matching patient. If no matching patients appear, select **CREATE NEW**, edit 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 Symmetry PACS 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
Symmetry PACS 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

Symmetry PACS 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

Symmetry PACS finds: Oswald, Trevor
…and…
Davis, Oswald

However, if you type: Os
Symmetry PACS finds only: Oswald, Trevor.

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	-

Command	Command Text	Shortcut
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

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
	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

Category	Report	Description
	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.
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

Category	Report	Description
	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 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 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.

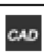
Setting	Description
Existing Insurance	Not available on all insurance screens. If you entered insurance for the patient previously, you can select it here to automatically fill in other options.
Insurance Carrier	Select the insurance carrier.
Insurance Provider Type	Entered automatically.
Policy Number	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.
Group Name	Type the name of the insurance group.
Valid From/To Date	Select the period during which the current policy is effective.
Medicare Ins. Type	Select the Medicare insurance type of the policy.
Eligibility & Estimation	
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

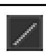
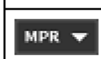
Measurement	Tools	Unit	Accuracy
Length	Ruler	mm	±2 mm
Angle	Protractor	°	±2°
Area	Calculated	cm^2	±5%
Ratio	Calculated		±2%

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.
	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.
	CAD	Displays CAD findings, with a button menu for selecting specific findings. Available when CAD findings are present in the opened study.
	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.

Tool	Name	Function
	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.
	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.
DP	DICOM Print	Sends the image to a DICOM printer.
	DICOM Values	Displays a list of DICOM values associated with the current image.
DM	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.

Tool	Name	Function
	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.
	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.

Tool	Name	Function
	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.
	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	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.

Tool	Name	Function
	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.
	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.
N	Study Notes	Displays a dialog for reading/writing notes.
T	Text	Draws text.
TA	Toggle Annotations	Shows/hides annotations.
TDO	Toggle DICOM Overlays	Shows/hides DICOM overlays.
T	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.

Tool	Name	Function
	Unq	Creates a teaching study.
	Vertical Line	Draws a vertical line.
	Window/Level	Adjusts the window/level.
	Zoom	Zooms the image in/out.

Details on Linked Reporting

Statuses of linked reports

- Any activity related to retaining the STAT level of a main study also applies to any of its linked studies.
- Any activity related to TAT recording (approval time) on a linked main study also applies to any of its linked studies.
- When you unlink an approved study, the study reverts to Unread status.
- When a main study changes to Approved status, so do its linked studies. In addition:
  - The order status of the linked studies changes to Check-Out.
  - The approving physician and/or pre-approving physician and approved date are added to the main and linked studies.
- When a main study changes to the following RAD-related statuses, so do its linked studies.

  Draft
  Transcribed
  Pre-Approved
  Dictated
  Approved-Coded (APCD status)

- When you add an addendum to a main study and the study status changes, its linked studies change to the same status, including the following.

  Draft - Addendum
  Transcribed - Addendum
  Approved - Addendum
  Dictated - Addendum

- When you right-click a main study and select Exam > Reset Transcription, the main study and linked studies are reset to Unread status.
- When you change a main study from Approved to an earlier status, you are prompted to unlink its linked studies. The main study changes to the selected status, and the linked studies change to Unread status. The report remains with the main study.
- When you change the status of a linked study, you are prompted to unlink it from the main studies. The linked study changes to the selected status, and no other studies are affected.
- When you reset the transcription of a main study, this resets the transcription for the main and linked studies, and sets their statuses to Unread. The studies remain linked.

- When you reset a main study with an approved report, you are prompted to unlink its linked studies. The main study changes to Scheduled status, and the previously linked studies change to Unread status.
- When you reset a linked study with an approved report, you are prompted to unlink it from the main study. The study changes to Scheduled status, and other studies are unaffected.

Considerations when transcribing linked studies

- When transcribing a main or linked study, the transcription lock is applied to the main study and all linked studies (in both Exa Trans and WebTrans). The following actions release the transcription lock on all studies:

  Close the transcription
  Sign out of Exa PACS/RIS
  Approve the study (E-sign and Approve, Approve and Next, or Pre-Approve)
  Using Skip or Not Approve

- Immediately after you link studies, Exa Trans and WebTrans updated accordingly, even if a transcription is open. This includes updating of the report header with information from the linked studies.
- Exa Dictation audio files are available in the viewer and in WebTrans for all main and linked studies.

Which reports can you link?

When you select to link reports, Exa PACS/RIS automatically displays a list of reports that are available to link. These studies:

- Have a study date 3 days before or after the main study
- Have a status other than Ordered, Cancelled, Rescheduled, No Show, Read, or Approved
- Are from the same facility as the main study

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 Symmetry PACS 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

Symmetry PACS 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 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, on the all uppercase menu, 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 Symmetry PACS 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.
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**.