KONICA MINOLTA HEALTHCARE IT

Exa® PACS/RIS

Feature Summary

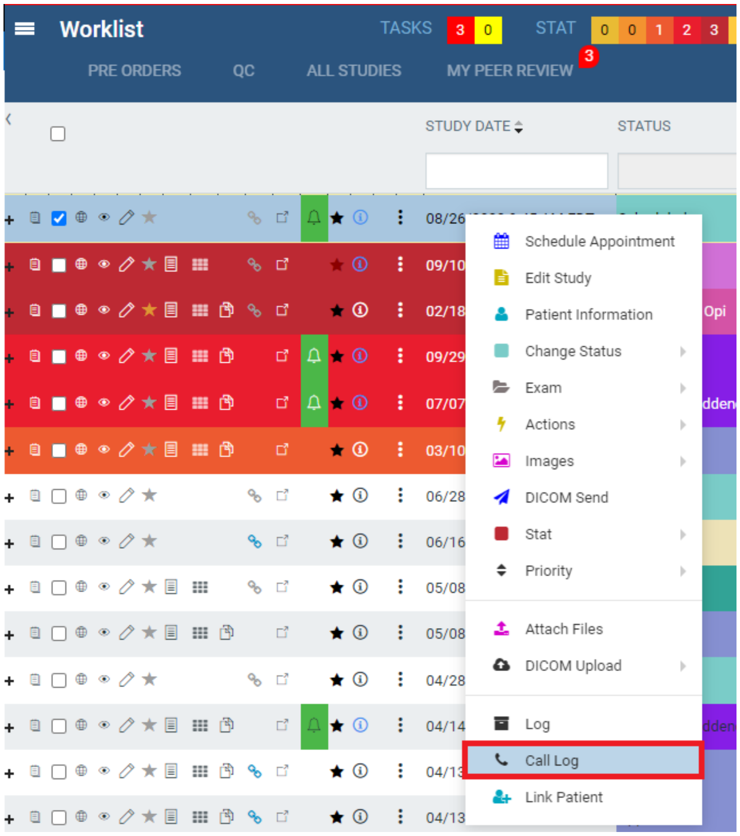
Front Desk Overview

500-000675A

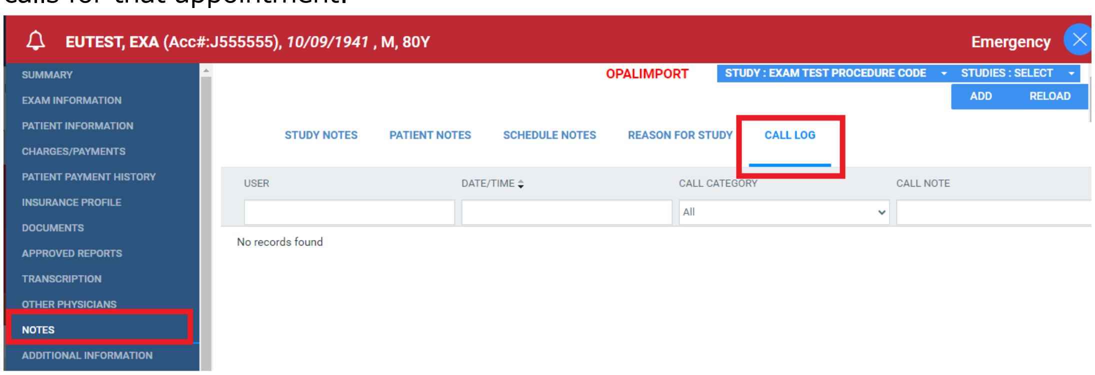
Call log

You can add Call Notes to record communication with patients.

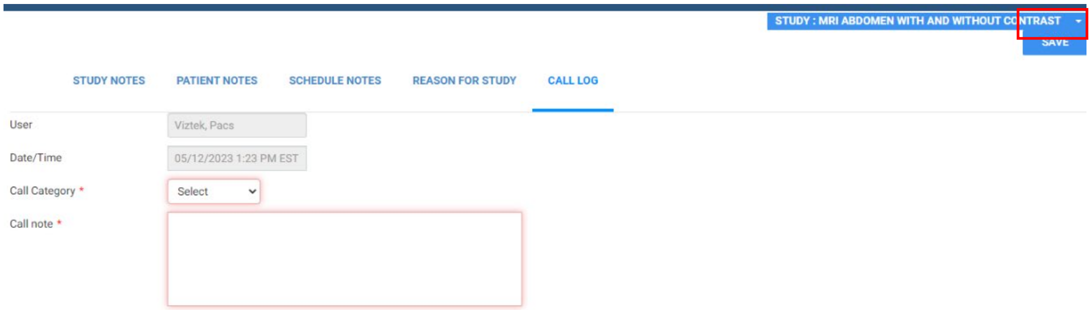
1. From the worklist, right-click a study and select **Call Log.**



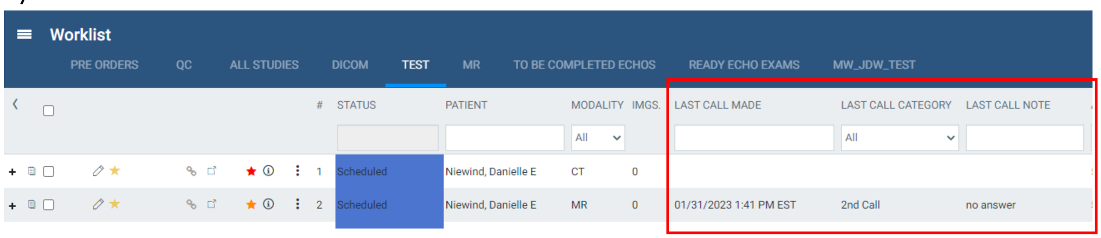
Result: The Edit Study screen opens in the Notes tab, showing the **Call Log** with a history of calls for that appointment.



2. To create a new call log note, select **Add**, enter the information in the figure below, and then select **SAVE**.



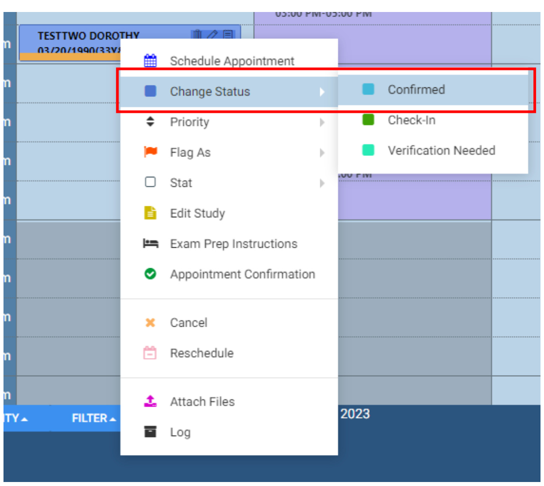
Optional: In **User Settings**, you can add the **Last Call Made**, **Last Call Category**, and **Last Call Note** columns to the worklist to show details of the the most recent call note for each study.

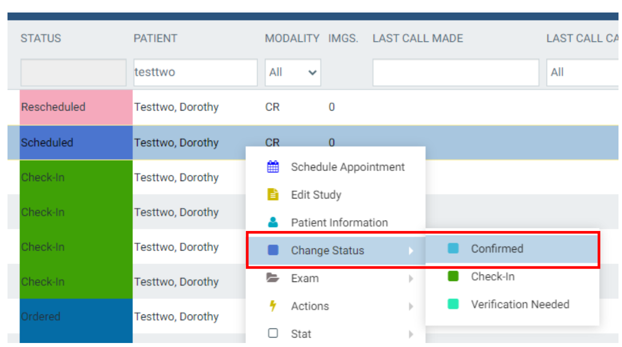


Update status of a confirmed appointment

When you confirm an appointment, change the status of the appointment to "Confirmed" to reflect that.

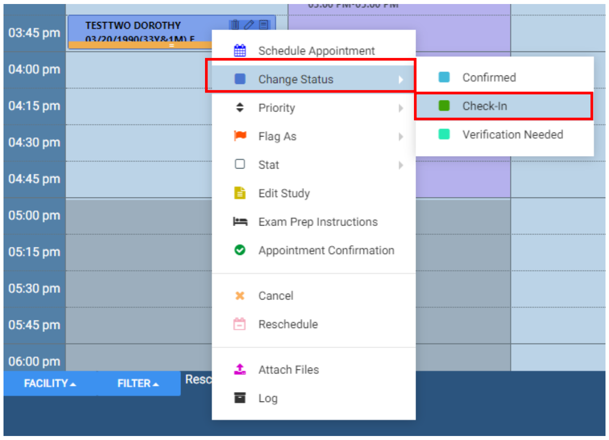
1. On the schedule book (or from the worklist), right-click the appointment block (or study row), hover over **Change Status**, and then select **Confirmed**.

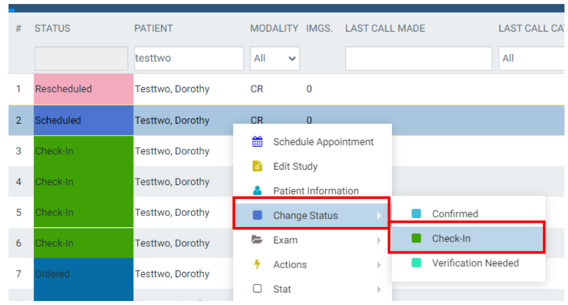




Check in a patient for an appointment

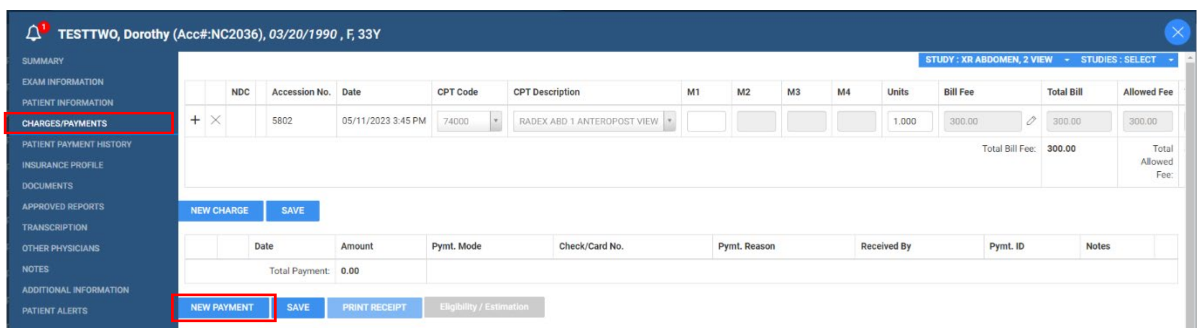
To check in a patient, right-click the appointment on the schedule book (or worklist), hover over **Change Status**, and then select ***Check-In.***



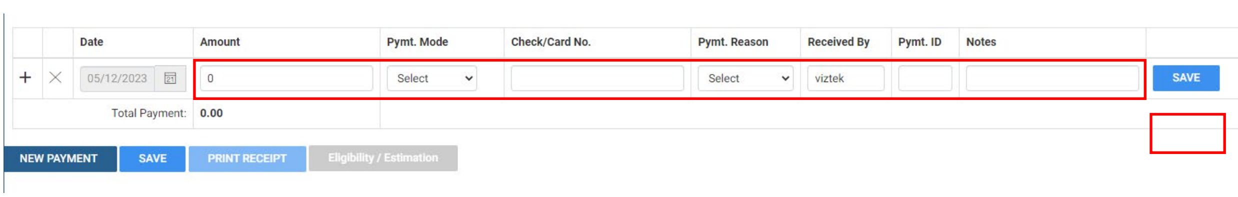


Add a charge or payment

1. To add a record of a charge or payment, on the schedule book, double-click the appointment block, or select its edit (pencil) button.
2. Select **CHARGE/PAYMENTS**, and then select **NEW PAYMENT**.

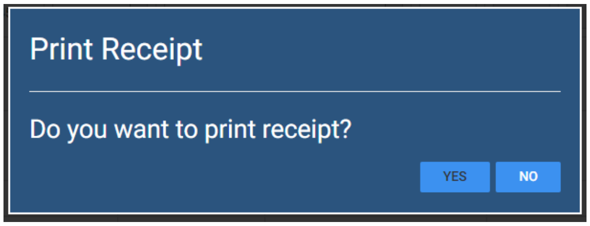


3. Enter payment information as in the figure below, and then select **SAVE**.

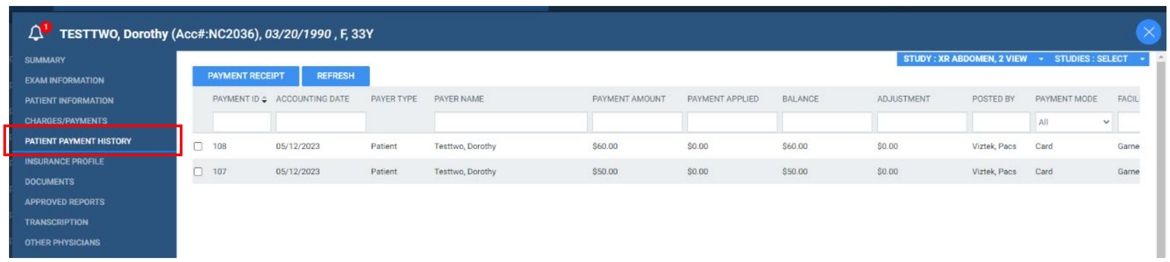


4. When prompted, select **YES** or **NO** to print or not print a receipt.

   Note: You can print a payment receipt any time by selecting **Print Receipt** in the **Charges/Payments** screen.

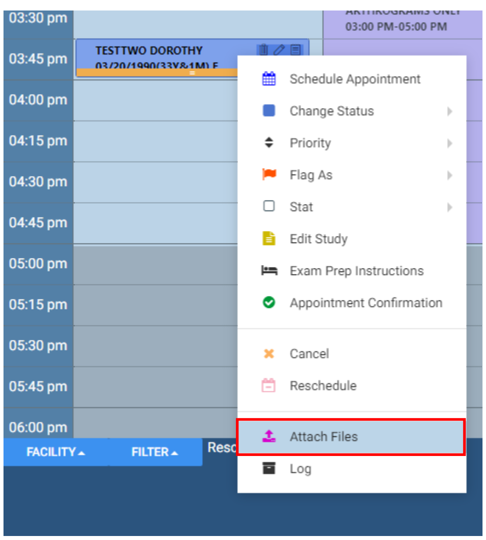


5. Optional. Select **PATIENT PAYMENT HISTORY** to see a history of the patient's payment records.

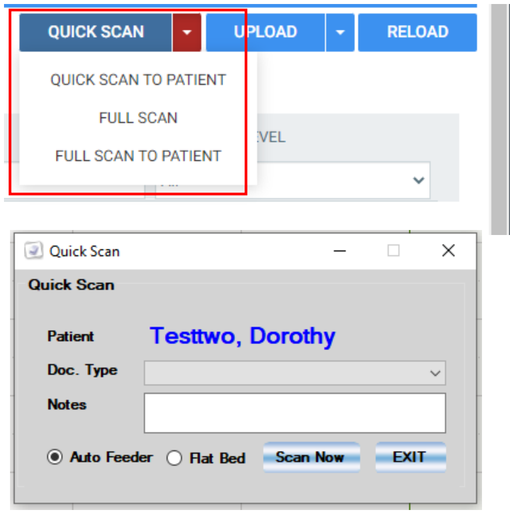


Attach documents to a study

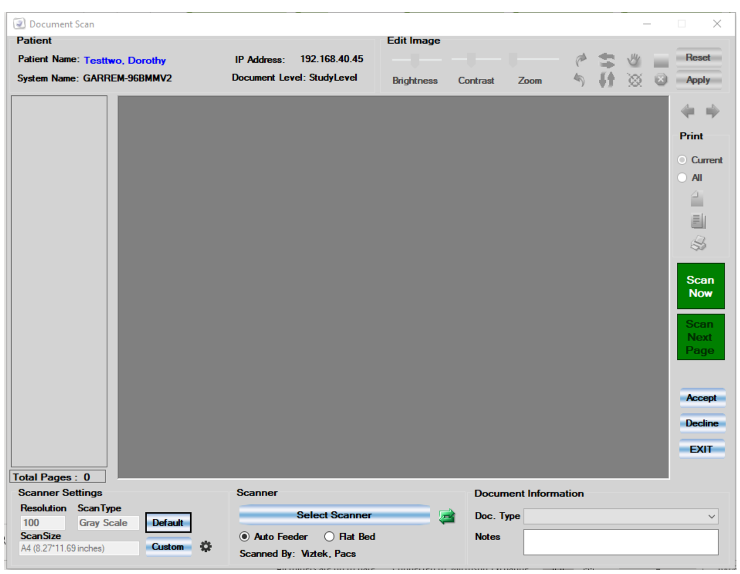
1. On the schedule book (or from the worklist), right-click an appointment block (or study row) and select **Attach Files**.



2. There are multiple levels of scanning that you can select from the **QUICK SCAN** button menu.

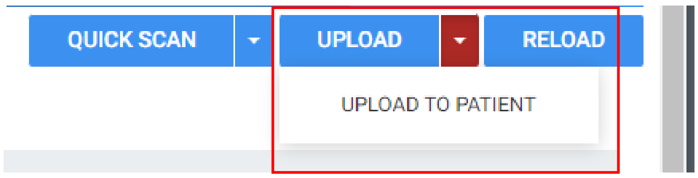


- **Quick Scan** – Opens the quick scan window where you can add a **document type** and **notes**. Select **Scan Now** to scan and attach the document to the **Study Level**.
- **Quick Scan to Patient** – Similar to Quick Scan, but the document is attached to the **Patient Level.**
- **Full Scan** – Opens the full scan window. In addition to **document type** and **notes**, this window provides a document preview with editing options. Select **Scan Now** to scan, and then select **Accept** to attach the document to the **Study Level.**

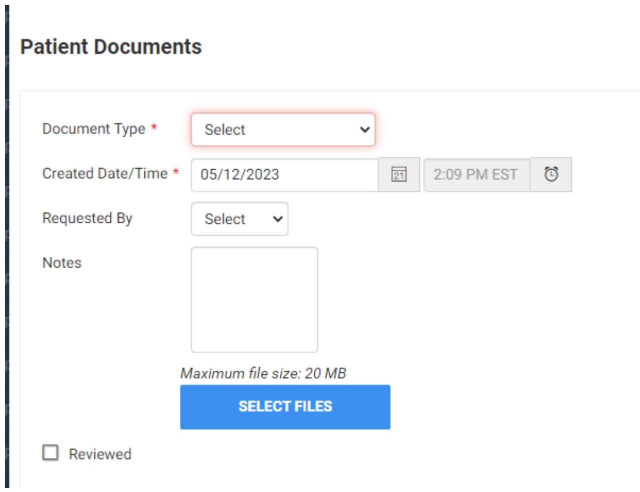


- **Full Scan to Patient** – Opens the full scan window with the same options, but attaches the document to the **Patient Level.**

3. On the **Upload** button menu, select one of the following options.



- **Upload –** Upload the document to the **Study Level**
- **Upload to Patient** – Upload the document to the **Patient Level.**

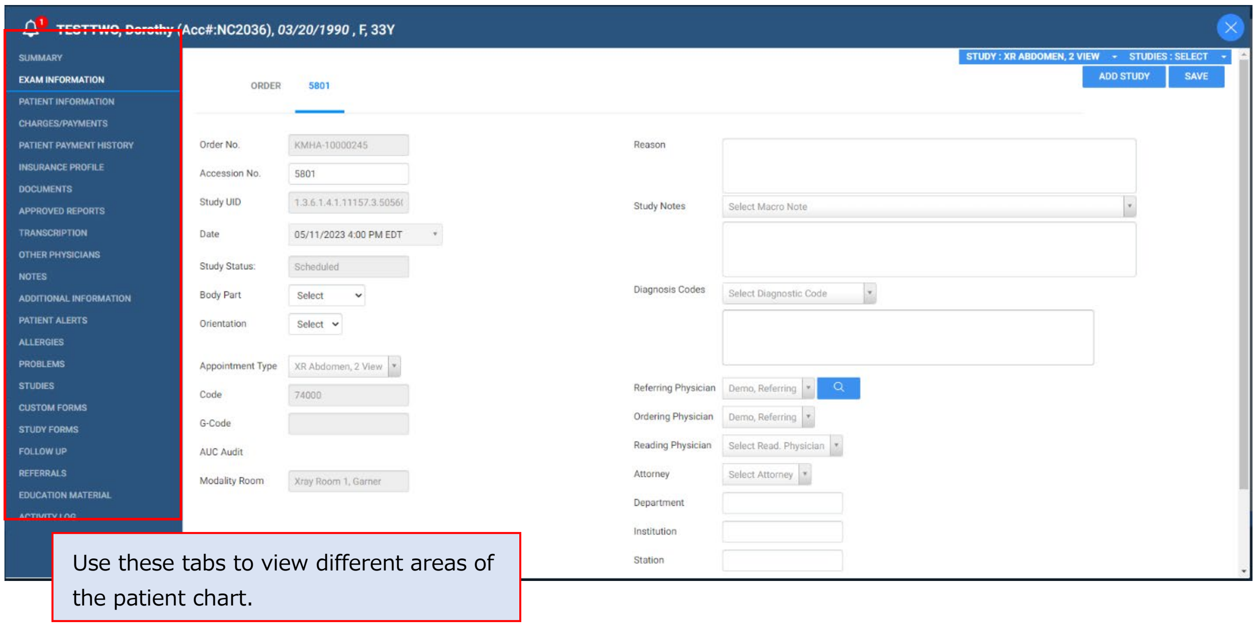


4. Select the **document type** and **created date/time**, and then select **Select Files** to select files to upload.

Edit a scheduled study or order

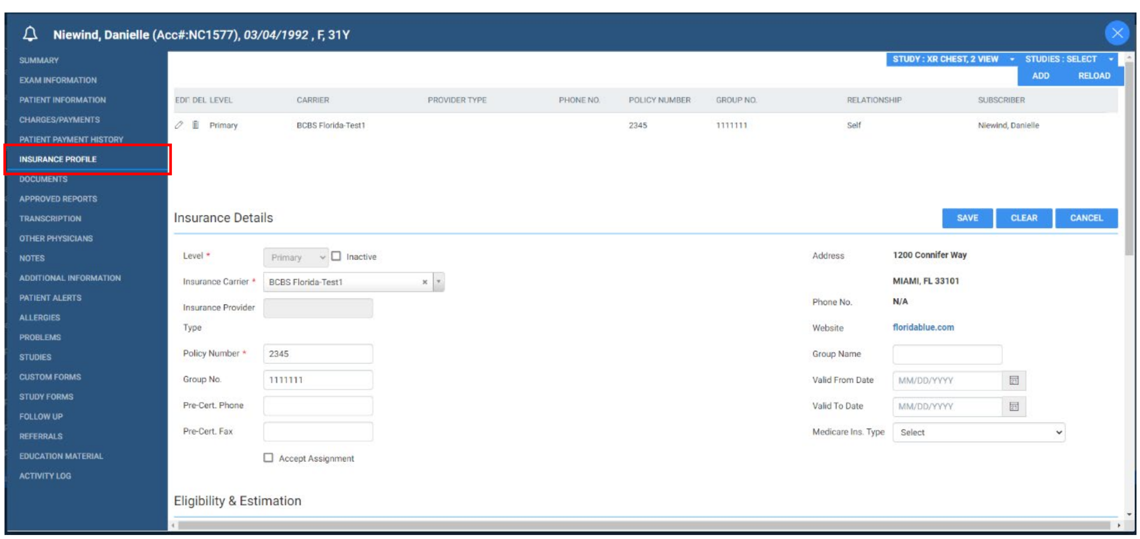
1. Double-click the appointment block on the schedule book or select its edit (pencil) button.

2. In the Edit Study screen or patient chart, edit the study or patient information as needed. Sections of these screens are described below.

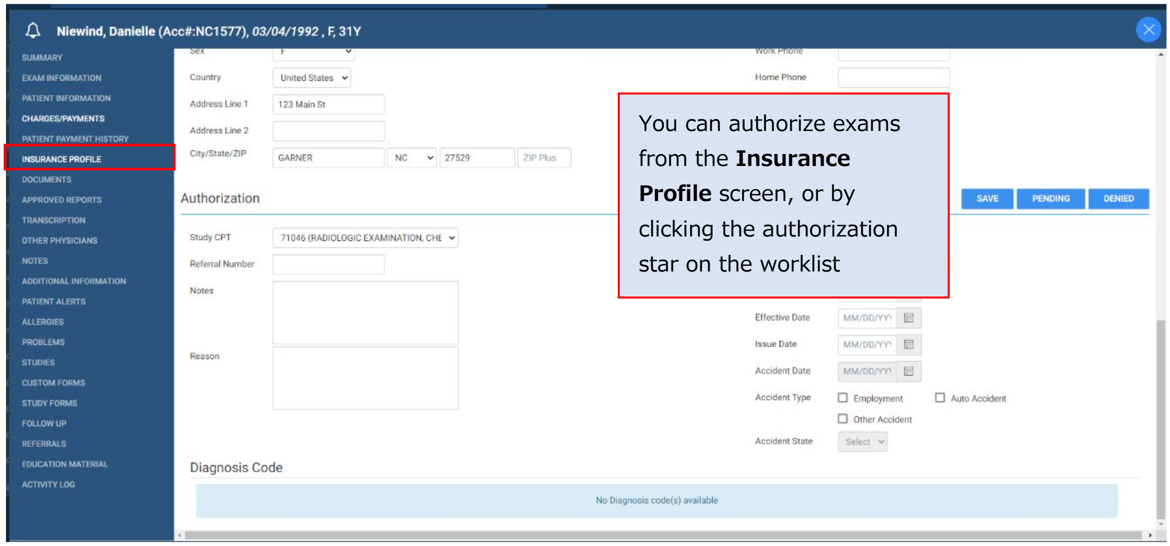


Insurance Profile

Shows any primary, secondary, and tertiary insurance policies that were added to the study. Select the **pencil** button to edit an insurance policy, or the **trash can** to delete it from the study.

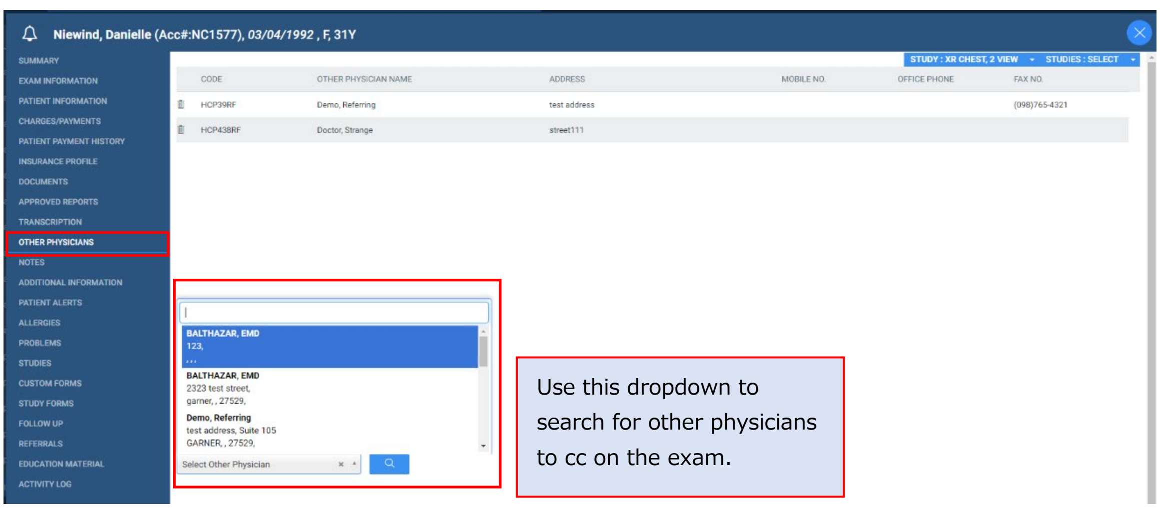


You can also edit exam authorization here.



Other Physicians

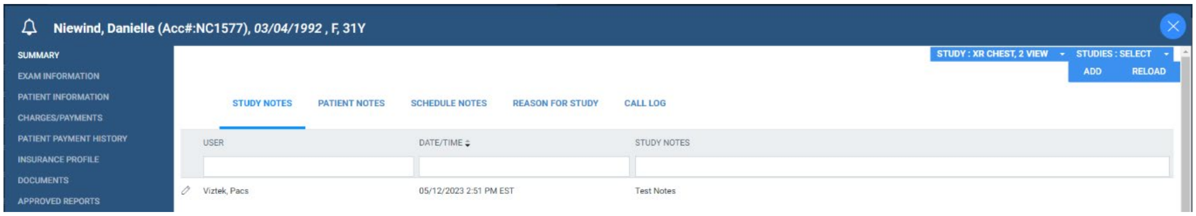
You can add physicians to an exam in the **Other Physicians** tab. If a physician uses **Physician Portal**, adding the physician's resource here will give them access to the exam in Physician Portal.



Notes

The Notes screen lets you view, add, or edit study notes, patient notes, schedule notes, reasons for studies, and Call Log entries.

- To add a note, select a tab for the type of note, and then select **Add**. Type the note, and then select **SAVE**.

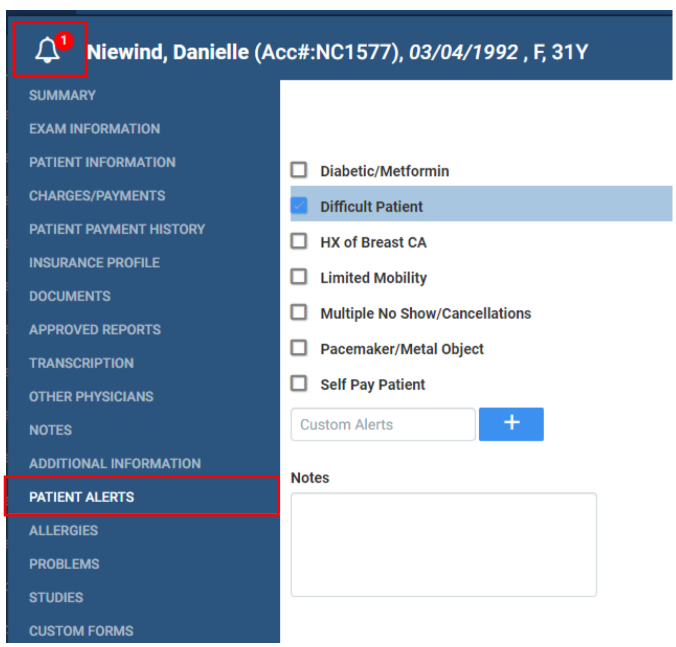


- To edit a note, select the **pencil** button.

Patient alerts

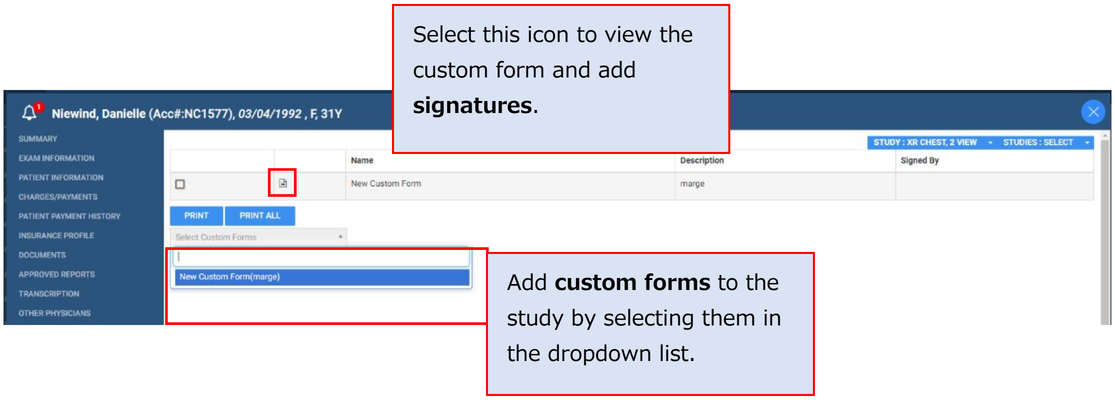
You can add pre-configured **Patient alerts** here, and also type **Custom alerts** and **notes**. Patient alerts stay on the patient's chart until you remove them. The bell icon shows the number of alerts that a patient has, and appears in various parts of the program.

The bell indicates how many **patient alerts** the patient has. You can select the bell to show alerts and add notes.



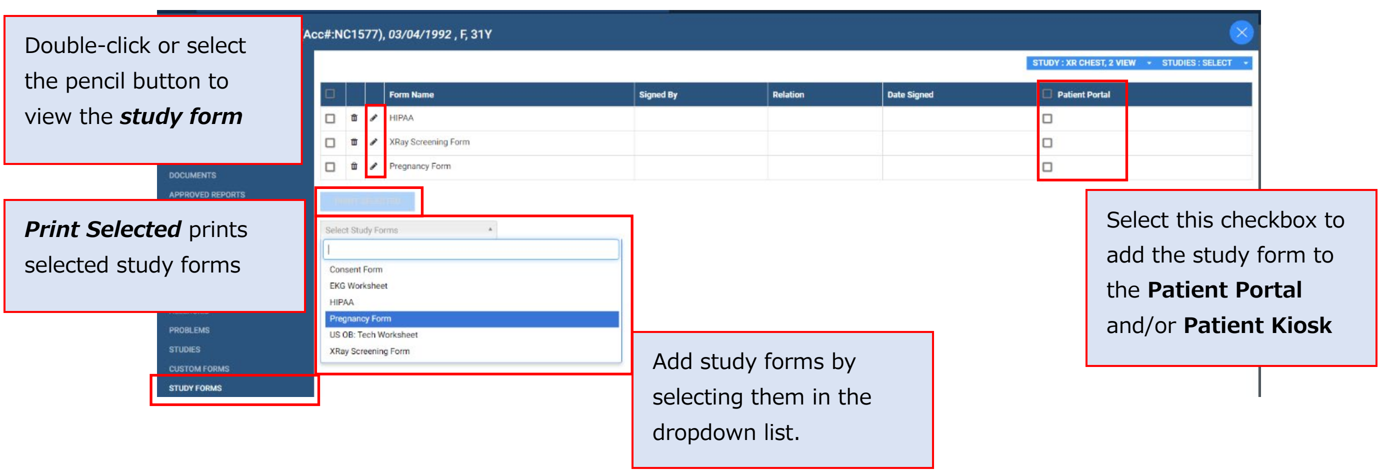
Custom Forms

You can add **Custom Forms** to the patient's exam by selecting them in the dropdown list. You can print custom forms by selecting them and then selecting **Print** or **Print All**.



Study forms

You can add **Study Forms** to a study, or auto-assign them based on criteria. To add **study forms**, select them from the dropdown list.



Double-click or select the **pencil** button to view and edit the study form.