Exa® PACS/RIS

Feature Summary

Radiologist Overview
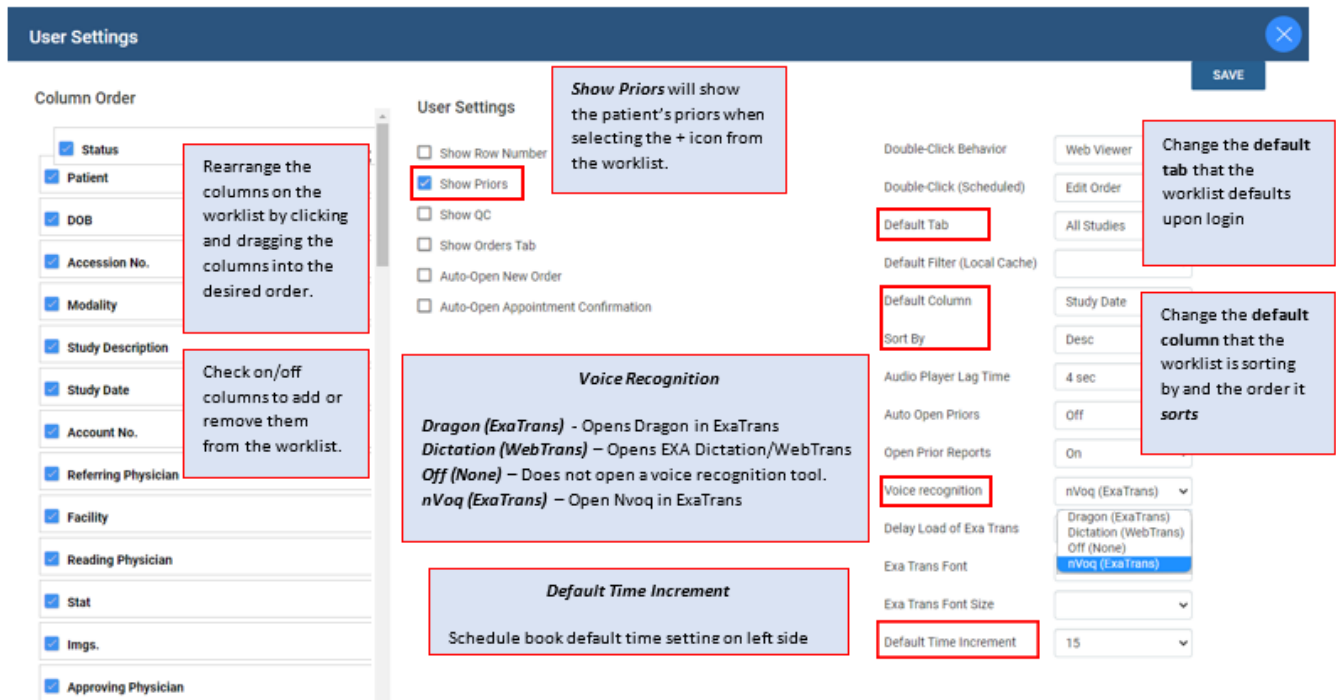
User settings

1. Open the **User Settings** by selecting the **Settings** button in the upper toolbar.
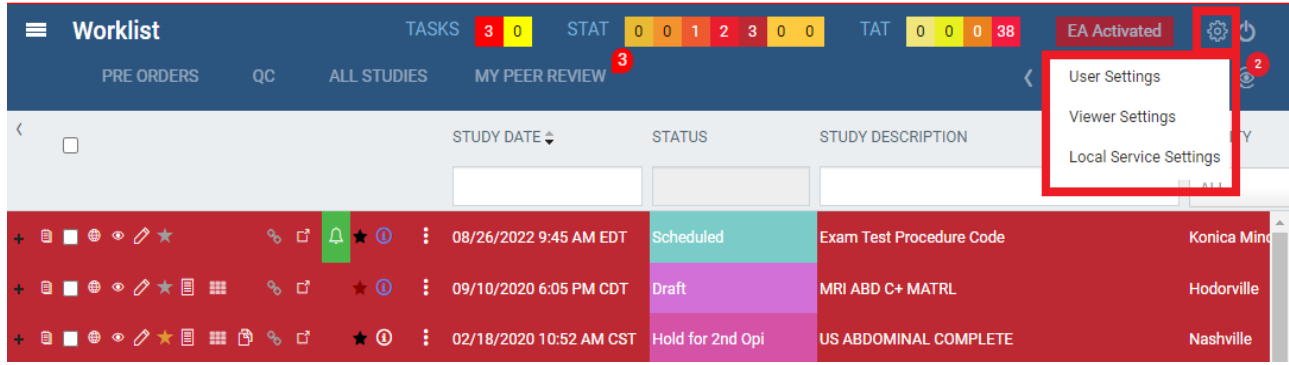
User settings control how the worklist appears and functions. Changes made in User Settings only affects the signed in user.

Worklist

You can customize the worklist's appearance and functions.

Filters and custom filters appear across the top and/or in the dropdown menu ☑

Reorder the columns by clicking and dragging the columns into the desired order.

Use the boxes under the column headers to search and filter the worklist.

The arrows next to the column header indicate that the worklist is sorting by that column. Click the column header to reverse the sort.

+ Expands to *Show Priors* for the patient (must be turned on in the *User Settings)*

▣ Opens a custom filter that displays the patient's prior studies.

☐ Selects the study for further actions.

⊕ Opens the study in the viewer. This icon will only appear if there are images available.

▤ Open EXATrans or WebTrans depending on what is selected under *Voice Recognition* in the *User Settings*

▦ Opens the multi-panel, which shows notes, prior reports, and more.

⊙ Opens the *Approved Report* of the study.

⚲ Allows the linking and unlinking of reports.

🔔 Appears if there is *Unread DICOM*, select to view unread images.

🔒 Appears if the study is opened by another user. Hover over to view the user.

Upper and lower worklist toolbar

The *STAT Level* bar indicates how many studies are at each STAT level on your current tab/filter. STATs are placed at the top of the worklist.

The *Turnaround Time (TAT)* bar shows the number of each study at each TAT.

Access the *User Settings* and *Viewer Settings* here.

Logs user out of EXA.

Opens the disagreement queue for Peer Review

Refreshes the worklist but keeps manually entered worklist filters.

Refreshes the worklist but clears any manually entered worklist filters.

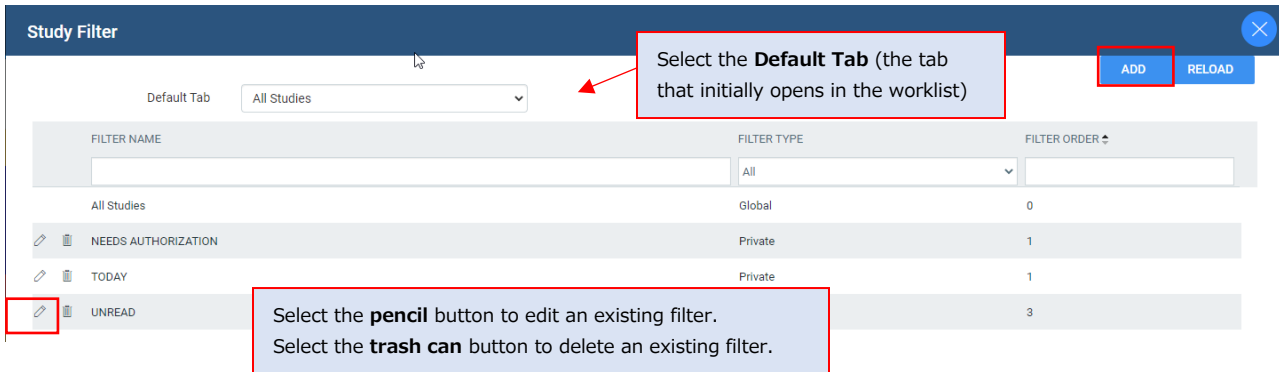Opens the filter window where filters can be added/edited/deleted.

Create a filter

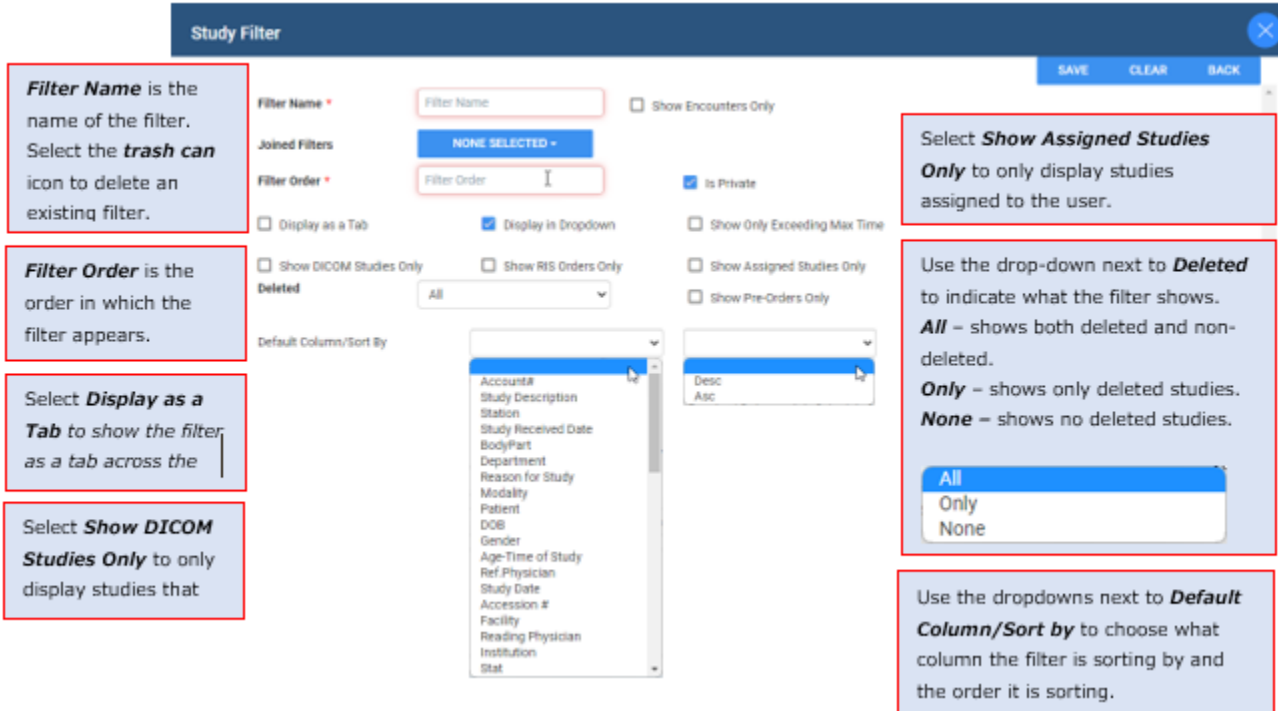1. To create a filter, select the **Filter** button on the worklist.

2. In the **Study Filter** screen, select **Add**.

Select the **Default Tab** (the tab that initially opens in the worklist)

Select the **pencil** button to edit an existing filter.
Select the **trash can** button to delete an existing filter.

3. To create a filter, enter a **Filter Name** and **Filter Order** first, and then enter criteria for the filter.

Filter Name is the name of the filter. Select the **trash can** icon to delete an existing filter.

Filter Order is the order in which the filter appears.

Select **Display as a Tab** to show the filter as a tab across the

Select **Show DICOM Studies Only** to only display studies that

Select **Show Assigned Studies Only** to only display studies assigned to the user.

Use the drop-down next to **Deleted** to indicate what the filter shows.
All – shows both deleted and non-deleted.
Only – shows only deleted studies.
None – shows no deleted studies.

Use the dropdowns next to **Default Column/Sort by** to choose what column the filter is sorting by and the order it is sorting.

Date/Time

Select what type of date the filter is looking at under **Date Operations By**.

Preformatted – Use the dropdown to select from a list of preformatted dates and date ranges.

Yesterday
Today
Tomorrow
Last 7 Days
Last 30 Days
Last Month
Next 7 Days

Last/Next – Use the empty field to enter a number and use the dropdown to select from a list of units of time.

Hour(s)
Day(s)
Week(s)
Month(s)
Year(s)

Date From/Date To – Select the calendar button to open a calendar view to select a date or type in the desired date. Select the clock button to select a time.

Patient Information

Is/Is Not/Contains

Is – Includes the Name/Account No./Alt Account No. that is typed out. It must match exactly to how it appears on worklist to be included.

Is Not – Excludes the name/account no./alt account No. that is typed out.

Type out the **Patient Name, Account No., or Alt Account No.** that you wish to include/exclude on the filter. Select + to add it to the list.

The **Patient Names, Account No., and Alt Account No.** that have been added to be included/excluded appear here. Use the trash can icon to remove from the list.

Study Information

Filters can be created using **Facility, Modality, Status, Study Description** and more.

To select one or more option from the category, hold down Shift on the keyboard while selecting

Is/Is Not/Contains

Is – Includes the category that is selected.

Is Not – Excludes the category that is selected.

Contains – Includes the category that contains the

Resource

Use the + icon to add the resource to the list that is to be included or excluded.

Filters can be created using various resources such as *Reading Physician, Approving Physician, Referring Physician* and more.

Use *Is* or *Is Not* to include or exclude the resource.

Select the dropdown menu to choose between *Select, Contains* or *Blank.*
Select – Includes/excludes resource that matches exactly to what is typed in.
Contains – Includes/excludes resource that contains the name/segment/phrase typed in.
Blank – Includes/excludes if the category is blank.

Resources that have been added to be included/excluded appear here. Use the trash can

Insurance

Filters can be created using *Insurance Provider, Insurance Provider Type* and *Insurance Authorization* status.

Use *Is* or *Is Not* to include or exclude the category options.
Use the + button to add to the list of options to include or exclude.
If selecting one than more option, hold Shift on the keyboard and then select multiple options.
Use the trash can button to remove options from the list.

Link reports

On the worklist, select the **Linked Studies** button to open the Link Studies window. Select one or more studies to link to the source study, then select **Save**.

> **Result**: The *Linked Reports* will turn blue to indicate that the study is linked to another study

- Report linking is only available for studies done within 3 +/- days of the source study.
- Report linking is not available for reports and studies in Approved, Ordered, Rescheduled, Cancelled or No-Show studies.

Unlink reports

1. Select the blue **Linked Reports** icon to open the Link Studies window.

2. Select the studies to unlink, and then select **Save**.
   If studies are unlinked after a report has been finalized, then only the source study will keep the report.

Basic viewer navigation

To open the Exa PACS/RIS viewer, from the worklist, select the **DICOM Viewer** button or double-click on the study.

The header displays patient and the current study information.

Main Toolbar – Tools and other functions/settings can be set here. If the number of tools exceeds the available space, hover over to access the additional rows of tools.

Partial Close
Close Study

The **Priors Bar** shows all the patient's priors. Double-click to open or close the thumbnails for the prior.

The **DM toolbar** shows hanging protocols that are applicable to the current exam and options to save, manage and more.

The **Thumbnail Bar** shows the thumbnail series for the current study and any priors study opened.
The red dotted line around the thumbnail indicates the active series in the viewer.
The yellow dotted lines around the thumbnails indicate that the series is opened in the viewer.

Right-click to open the **Context Menu** which shows tools and other viewer functions.

Hovering over the top, left and bottom of each grid frame shows floating toolbars to access shortcuts to tools.

Configure transcription templates

For information on how to configure transcription templates, please see the relevant quick guide or section in the user's manual.

Use transcription templates with Web Trans

1. In **User Settings**, under **Voice Recognition**, select **Dictation (WebTrans)**.
2. To open **WebTrans**, choose from the following methods.
- Select the **transcription** button from the worklist.
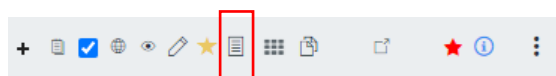
- Select the **multipanel** button from the worklist. In the multipanel, the transcription editor is one of the available modules.


- Select **T** in the viewer main toolbar (this also opens the multipanel).

3. In **WebTrans**, in the **Templates** dropdown list, select a transcription template.
4. Dictate the report and then select one of the options to change the status of the study.

> **Save** - Saves the dictation and changes the study status to **Draft**.
> **Submit for Review** – Saves the dictation and changes the study status to **Transcribed**.
> **Pre-Approve** – Saves the dictation and changes the study status to **Pre-Approved**.
> **Approve** – Saves the dictation and changes the study status to **Approved**.
> **Skip** – Does not save the current dictation, does not change the current study status and skips to the next available study.
> **Approve & Next** – Approves the current dictation and auto opens the next available study.
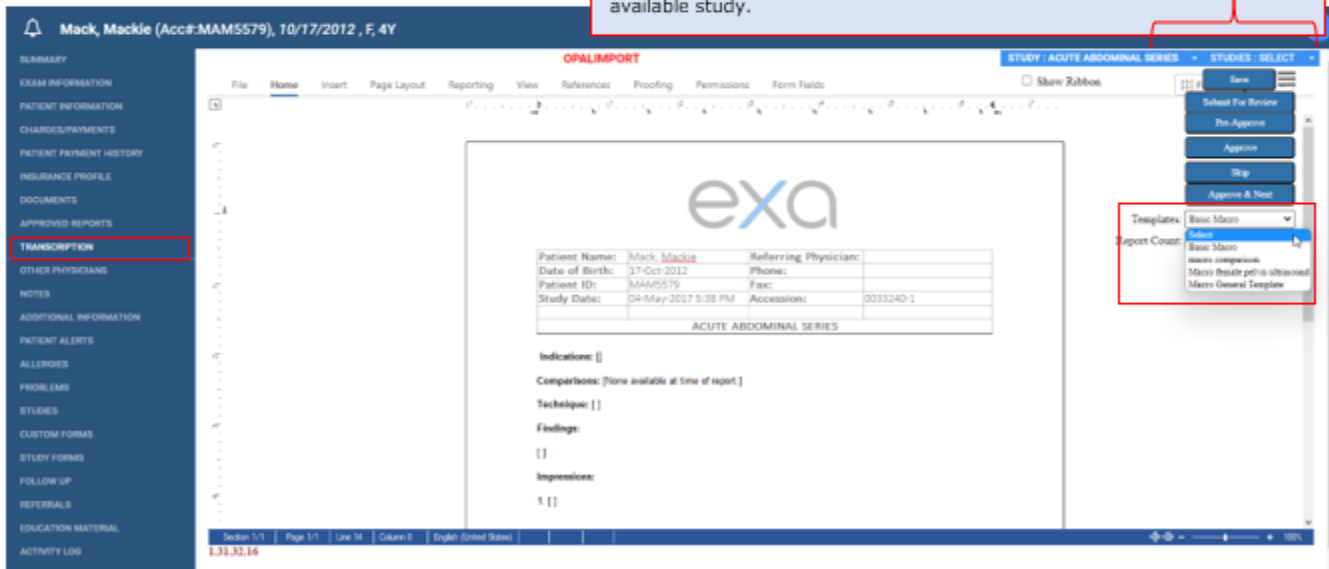
Use transcription templates with Exa Trans

1. In **User Settings**, under **Voice Recognition**, select **nVoq (ExaTrans)** or **Dragon (ExaTrans)**.
2. To open **ExaTrans**, choose from the following methods.
- Select the **transcription** button from the worklist.

- Select **T** in the viewer's main toolbar.

   Note: In Viewer Settings, you can also configure Exa Trans to auto open.
3. In **Exa Trans**, in the **Templates** dropdown list, select a template.

If **All** is cleared, the Templates dropdown list only shows transcription templates that are applicable to the study based on the assignment criteria of the template.
Select **All** to show all transcription templates in the dropdown list.

If using **nVoq** for voice recognition, you can call in transcription templates using the macro keyword configured in the template.
The transcription template must appear in the dropdown list to be called in using the macro keyword. Note that the name of the template in the dropdown list may differ from the macro keyword used to call it in.

e-sign & Approve – Saves the dictation and changes the study status to Approved*.*
Approve & Next – Approves the current dictation and auto opens the next available study.
Not Approve – Save the dictation but leaves the study in Unread status.
Save - Saves the dictation and changes the study status to Draft.
Skip – Does not save the current dictation, does not change the current study status and skips to the next available study.
Pre-Approve – Saves the dictation and changes the study status to Pre-Approved*.*

Add an addendum in Web Trans

1. Open the transcription editor on an Approved study.
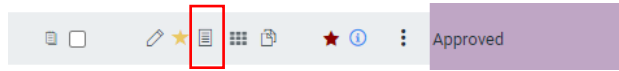
2. Use the middle scroll bar to move down to the **Add Addendum** button.
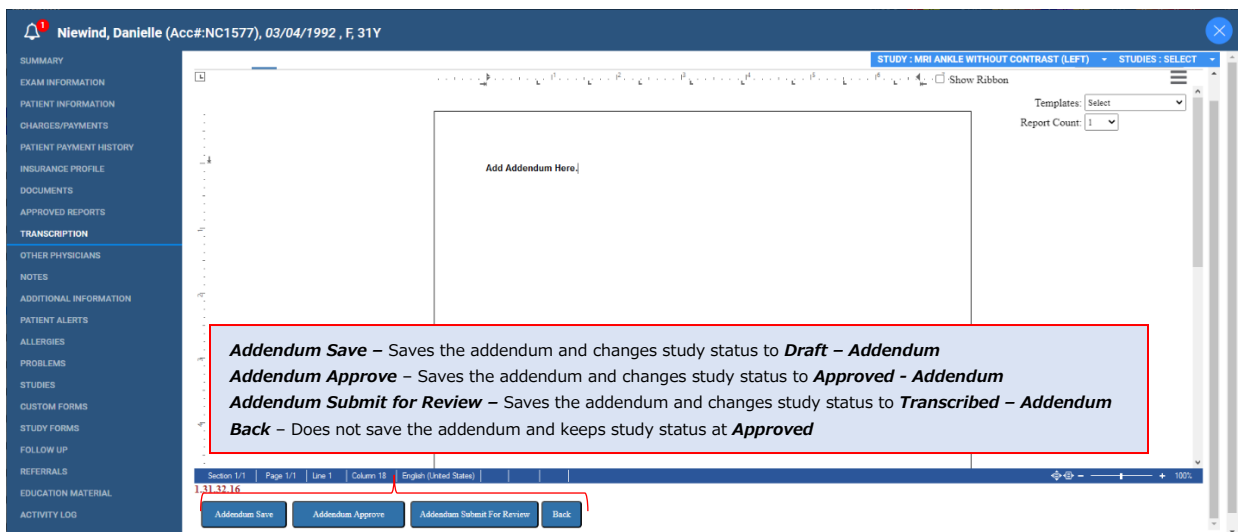

Use this middle scroll bar to move to the **Add Addendum** button.
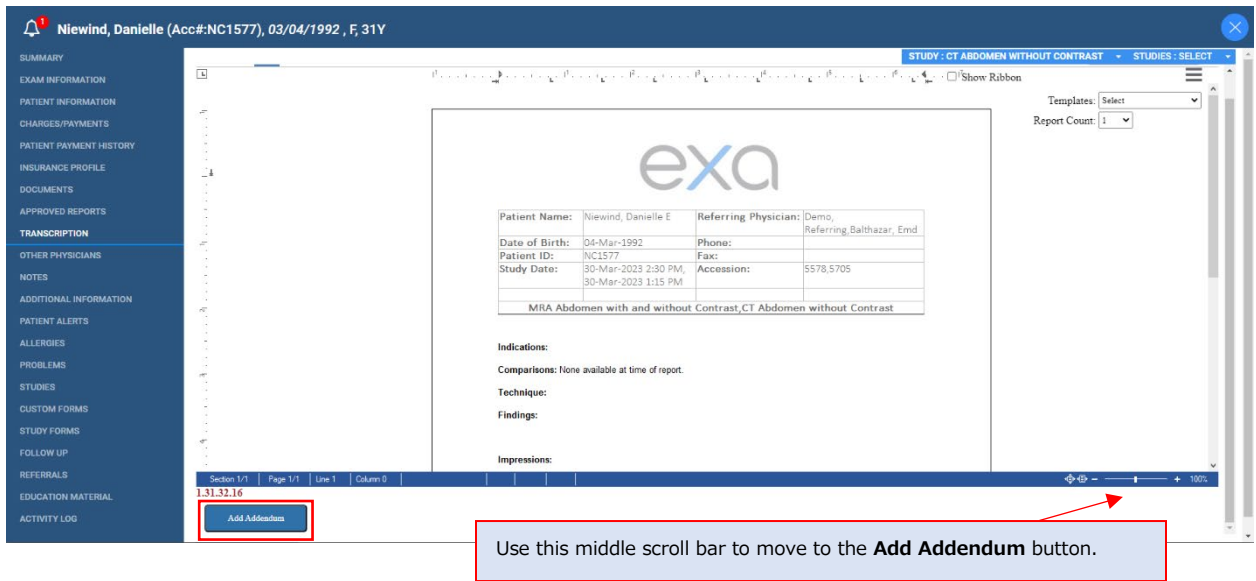
3. Select **Add Addendum** to open a blank window, and add the addendum in the blank window.
4. Select one of the status options at the bottom of the window.
   Note: transcription templates can be used in addendums.

Addendum Save – Saves the addendum and changes study status to **Draft – Addendum**
Addendum Approve – Saves the addendum and changes study status to **Approved - Addendum**
Addendum Submit for Review – Saves the addendum and changes study status to **Transcribed – Addendum**
Back – Does not save the addendum and keeps study status at **Approved**
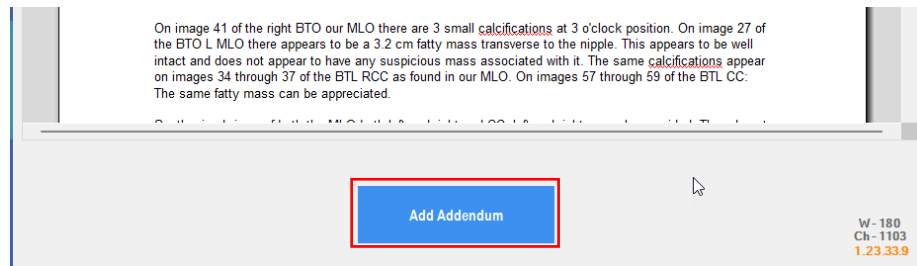
Add an addendum in Exa Trans

1. Open **Exa Trans** on an Approved study.
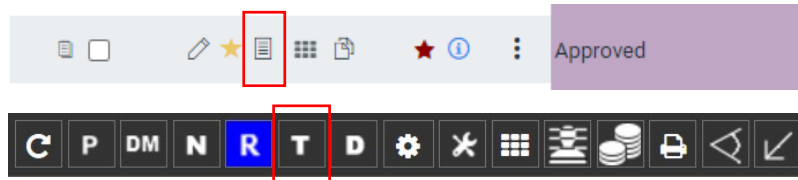
2. Select **Add Addendum**, and then add an addendum.

3. Select **Addendum Approve** or **Addendum Save.**