

exa-PACS • exa-RIS

# User's Manual

## Physician Portal










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**Table of Contents**

- Symbols ..... 3
- Regulatory and compliance ..... 4
- System requirements ..... 4
- Welcome to the Physician Portal ..... 5
- Setup ..... 5
  - Create a provider resource..... 5
  - Create the USER..... 8
- Use Physician Portal ..... 10
  - Sign in to the physician portal ..... 10
  - Use the navigation pane ..... 11
  - Find common features ..... 11
  - View approved reports ..... 12
  - View images..... 12
  - Import images..... 13
  - Burn studies to a CD ..... 17
  - Create worklist filters ..... 18
  - Use Break the Glass ..... 20
  - My Exams ..... 22
    - Group Exams..... 22
    - Pending Orders..... 23
    - Pending Appointments..... 23
  - Order an exam ..... 23
  - Add a document to an exam ..... 25
  - Sign an order ..... 26
  - Sub Menu ..... 27
  - Patient List..... 29

## 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
	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
	Batch Code	Indicates the full Software Release / Version number	ISO 15233-1:2021	5.1.5
	Serial number	Indicates the manufacturer's serial number so that a specific medical device can be identified	ISO 15233-1:2021	5.1.7
	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
	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

## Regulatory and compliance



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## System requirements

The following are the minimum system requirements for clients of Exa PACS/RIS.

### 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

## Welcome to the Physician Portal

This manual describes:


- How administrators can set up the Exa PACS/RIS Physician Portal (see “Setup”)
- How providers can use the portal (see “Use Physician Portal”)

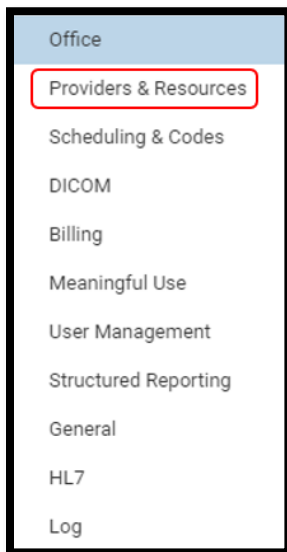
### Providers

Before you begin, obtain account credentials from your site administrator. By default, those credentials allow you to view and modify any patient records that specify you as the referring provider or CC provider. Your credentials also give you read-only access to the records of patients from other providers in your Provider Group. In addition, there is a Break the Glass feature that makes other records available to you.

## Setup

### Create a provider resource

1. On the navigation (“burger”)  menu, select **SETUP**.
2. On the **OFFICE** dropdown list, select **Providers & Resources**.



3. Select the **RESOURCE** tab.



4. Select the **ADD** button.



5. Enter required information (indicated by an asterisk \*), and note the following.

Type \* Referring Provider  
Code 12345  Inactive  
Name \* First MI Last Suffix  
Title  
NPI No. 123456789\_  
Taxonomy Code  
Dr. Office Name  
SSN  
Federal Tax ID  
EIN No.  
ETIN No.  
Medicare UPIN

- **Facilities** – Select one or more facilities.

Market NONE SELECTED -  
Facilities \* ALL SELECTED (11) -  
Specialty NONE SELECTED -

- **Group** - Select if the provider is member of a provider group

Contact Information  
Code \* 12345  Inactive  
Provider Organization Select  
Group Select provider group  
Email  
Contact Name  
Country United States  
Address Line 1 \* 123 Any Street  
Address Line 2  
City/State/ZIP PHILADELPHIA PA 19143 ZIP Plus

- **Fax** – Select the checkbox and type the fax number if auto-faxing approved reports.

Office Phone (111)222-3333  
Office Fax (222)333-4444  Office Fax  
Mobile No.  
Pager No.  
Phone No. (111)222-3333  
Fax No. (222)333-4444  Fax  
 Primary Contact

- **Reports to Me** – Select **None** or **Fax** and type the fax number if auto-faxing approved

reports.

Reports to Me

Contact Information \*  None  Email Report Link  Email Attachment  Postal Mail  Fax  
 Office Fax  HL7

6. Select **SAVE**.

7. Select **LOGIN DETAILS**.

If a user already exists, link the user.

\*The user must be in the PORTAL GROUP for access to Physician Portal.

Select User

**LINK USER**

8. If a user needs to be created and linked, enter the fields in the figure below.

**Note:** Set **Group Name** to **PORTAL GROUP** for access to the Physician Portal.

New User \*

Password \*

Confirm Password \*

Access Expires After  days

One-Time Access


Group Name \*    Hide AD Groups

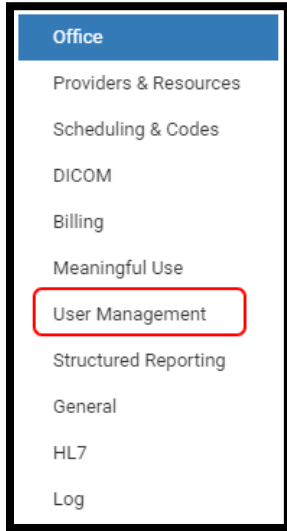
**CREATE USER**

9. Click **SAVE & CLOSE**.

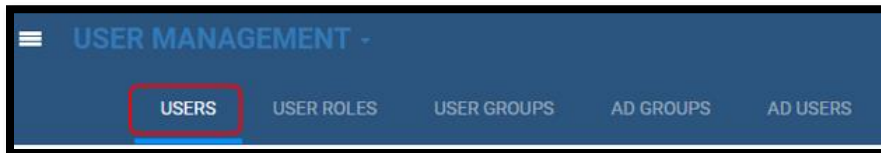
### Create a user

Create a user account for the physician.

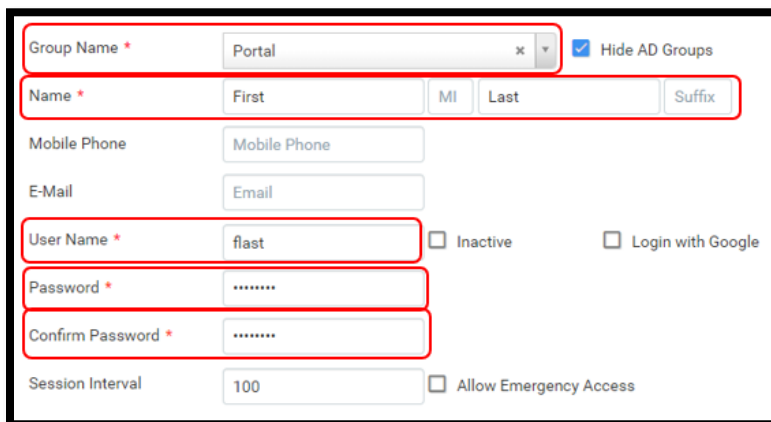
1. From the burger  menu, select **SETUP**.
2. From the **OFFICE** menu, select **User Management**.



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



4. Enter the required fields (indicated with an asterisk \*) and all other fields described below.
  - **Group Name** - Select **Portal**.
  - **Session Interval** - Set a value.

A form for creating a user. Fields are arranged in rows. 'Group Name \*' is a dropdown menu with 'Portal' selected and a 'Hide AD Groups' checkbox checked. 'Name \*' is split into 'First', 'MI', 'Last', and 'Suffix' text boxes. 'Mobile Phone' and 'E-Mail' are text boxes. 'User Name \*' is a text box with 'flast' entered, next to 'Inactive' and 'Login with Google' checkboxes. 'Password \*' and 'Confirm Password \*' are password fields with masked characters. 'Session Interval' is a text box with '100' entered, next to an 'Allow Emergency Access' checkbox. Red boxes highlight the 'Group Name', 'Name', 'User Name', 'Password', and 'Confirm Password' fields.

- **Linked Provider User Type** - Select **Provider**.



- **Referring Provider** – Select a resource
- **Patient Search Type** – Set to **Associated Patients Only** (referring providers do not have access to the full database)

Access Expires After  days

One-Time Access

User Must Change Password Next Login

User can change accounting dates

Dragon 360

Market

Facilities \*

Linked Provider User Type

Referring Provider

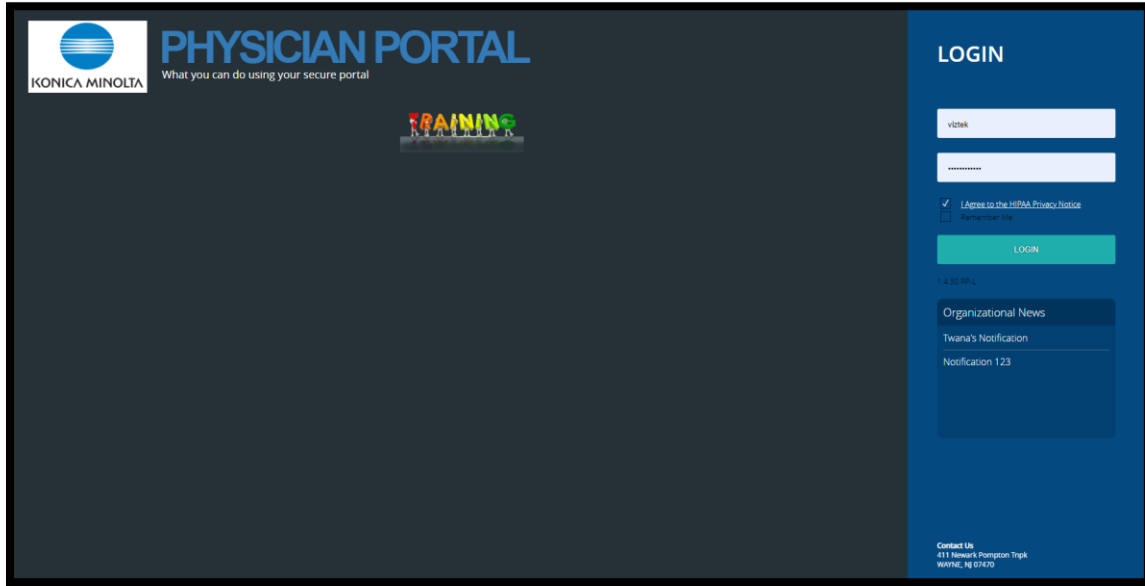
Patient Search Type  Associated Patients Only  Full Database

5. Click **SAVE & CLOSE**.

## Use Physician Portal

### Sign in to the physician portal

1. In Chrome, go the URL provided to you by your administrator or Konica Minolta.

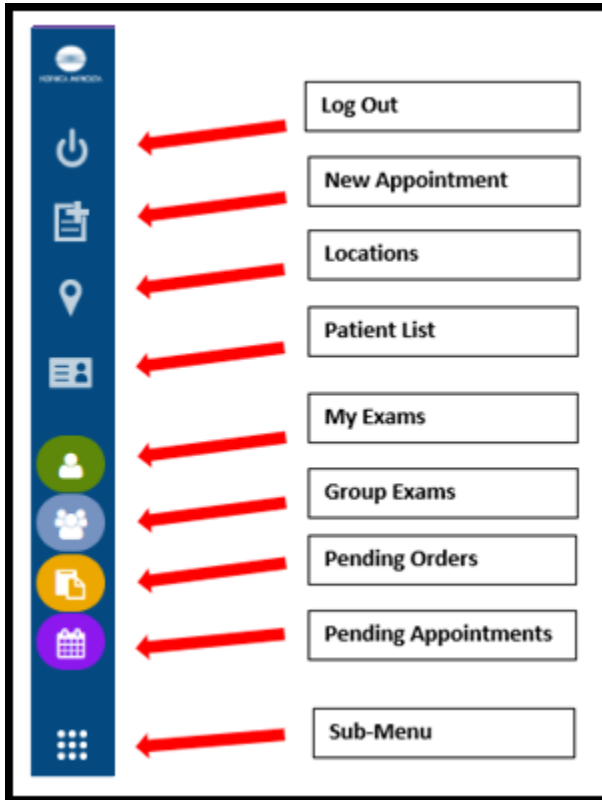


2. On the right pane, type your sign-in credentials, select **I Agree to the HIPAA Notice**, and then select **LOGIN**.



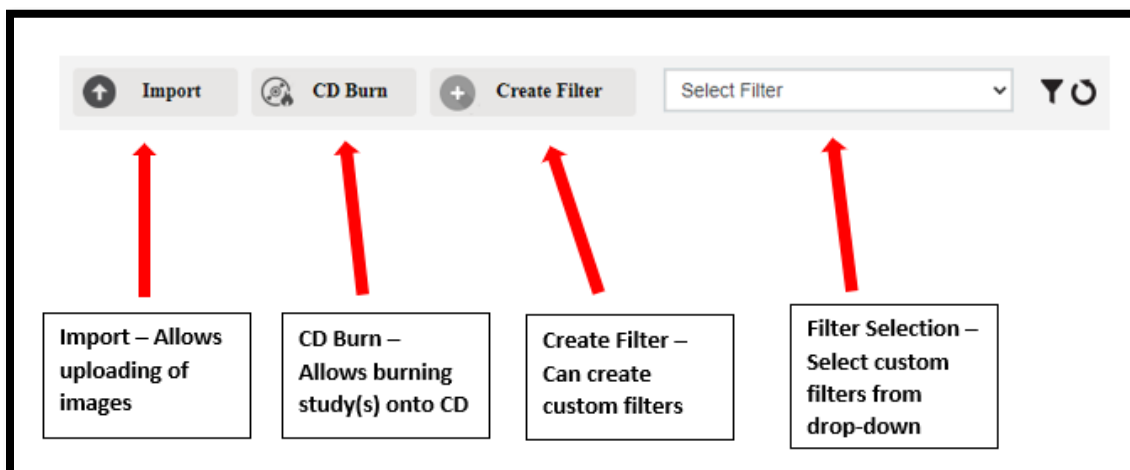
### Use the navigation pane

The navigation pane always appears on the left side of the screen.




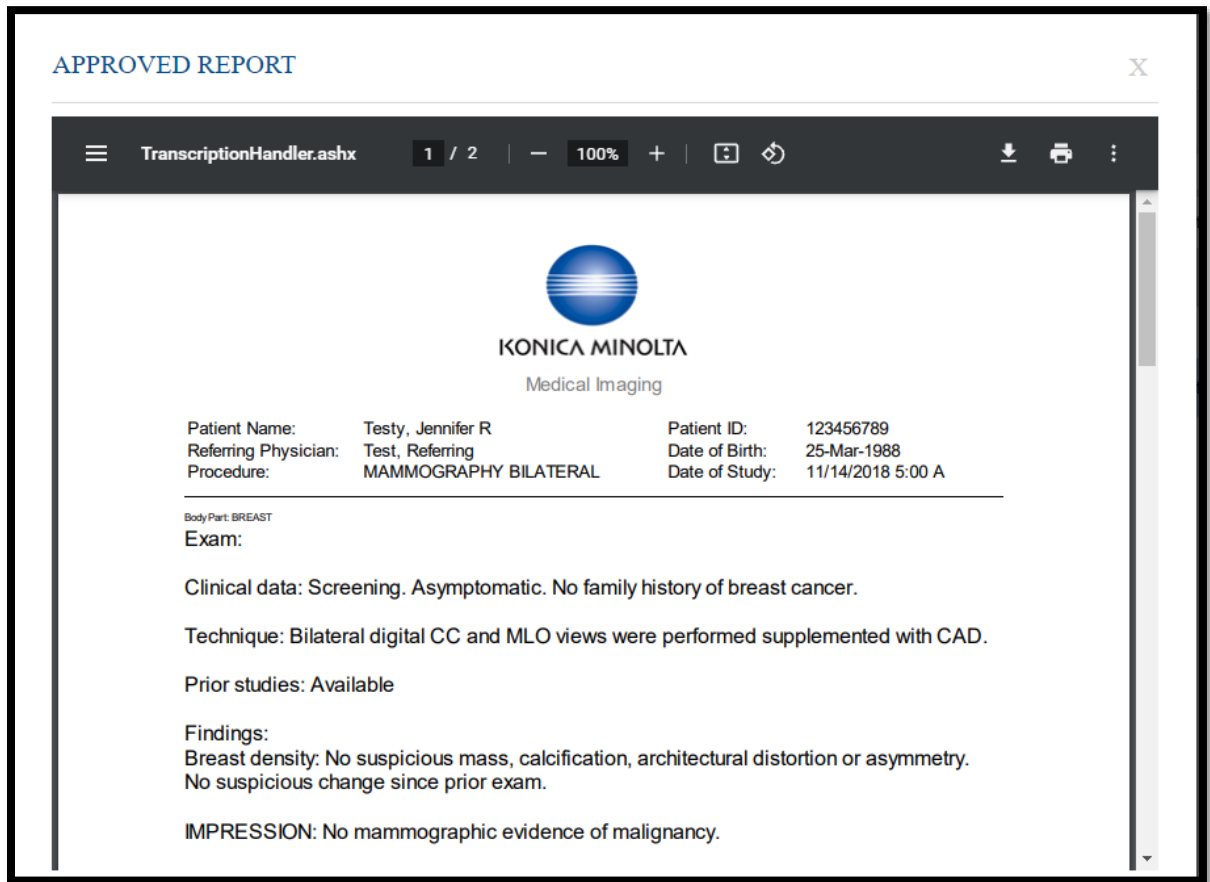
### Find common features

To find the following features, go to the MY EXAMS or MY GROUP worklists. The Import & CD Burn functions are available on these worklists, and also from Sub-Menu. In addition, users with rights can find the Break the Glass function on the MY EXAMS worklist.





### View approved reports

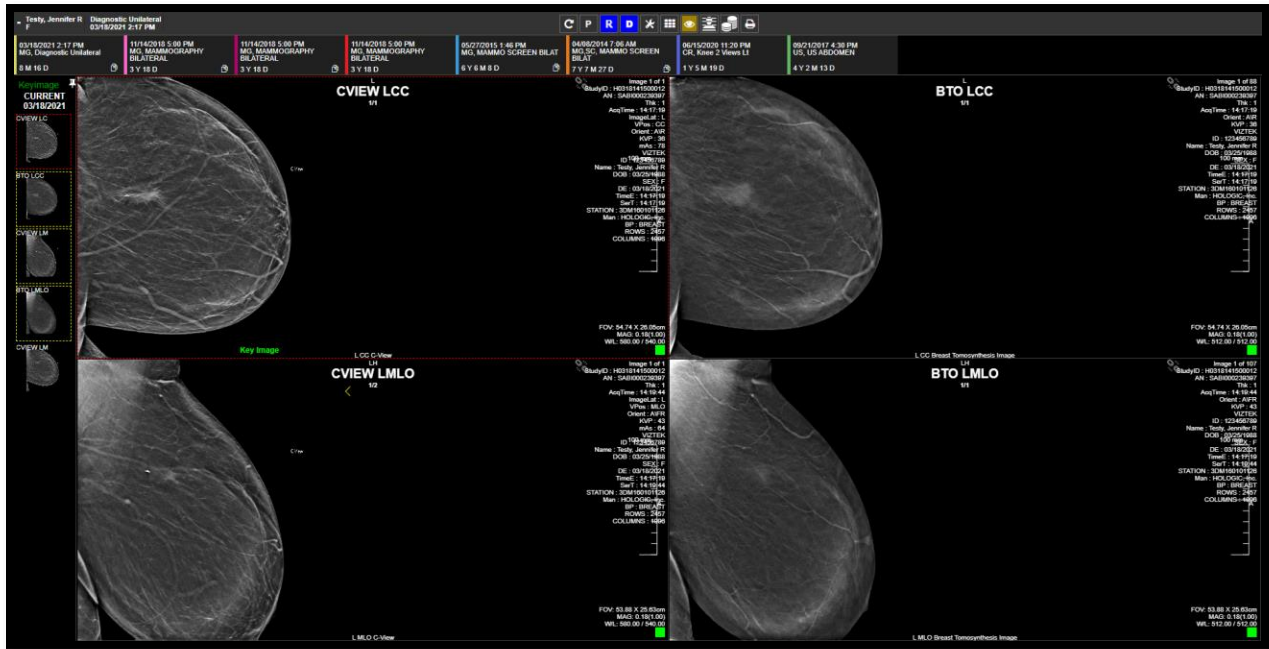
1. Select the  icon to open an approved report.



2. You can download or print the report.

### View images

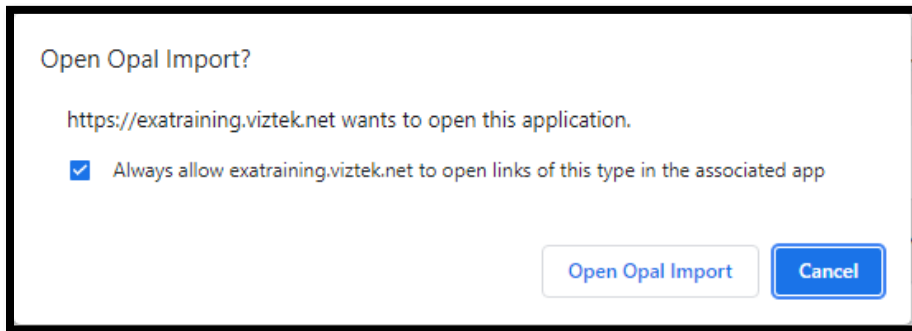
1. Select the  button to open images in the viewer.
2. Optional. With certain user rights you can customize your view by selecting the viewer settings  button.



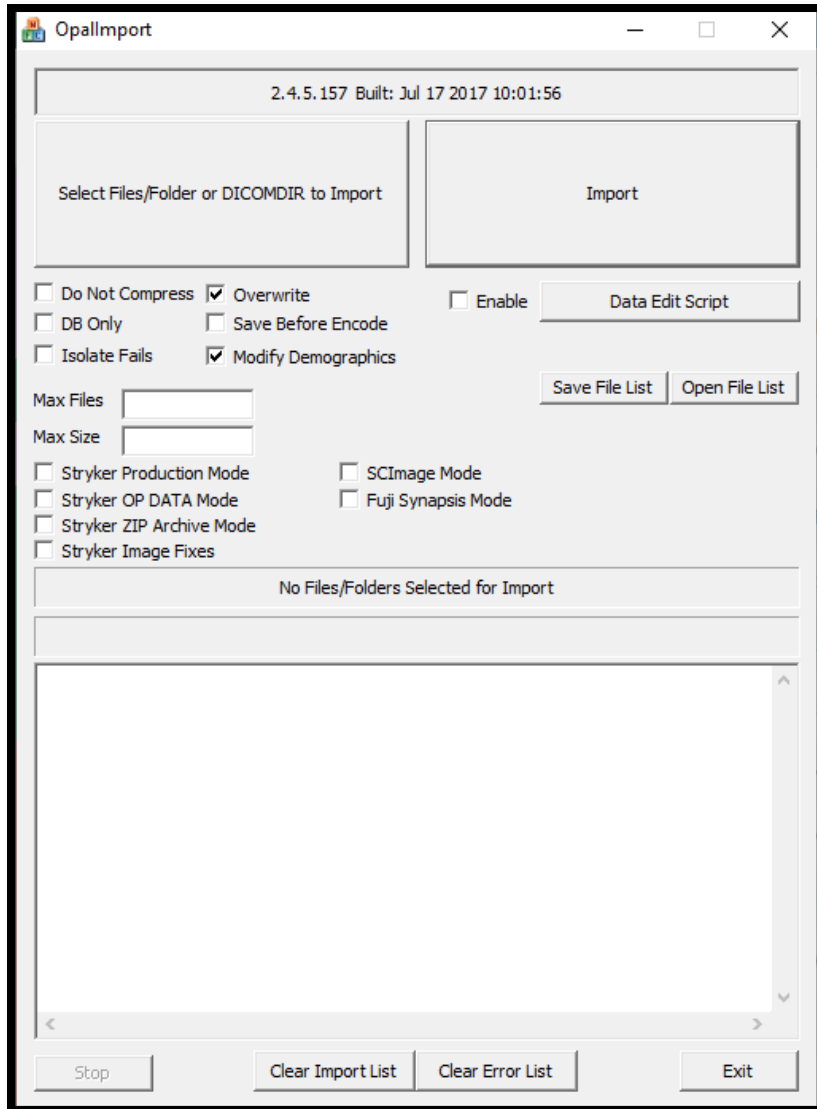
### Import images



1. Select the **Import** button.



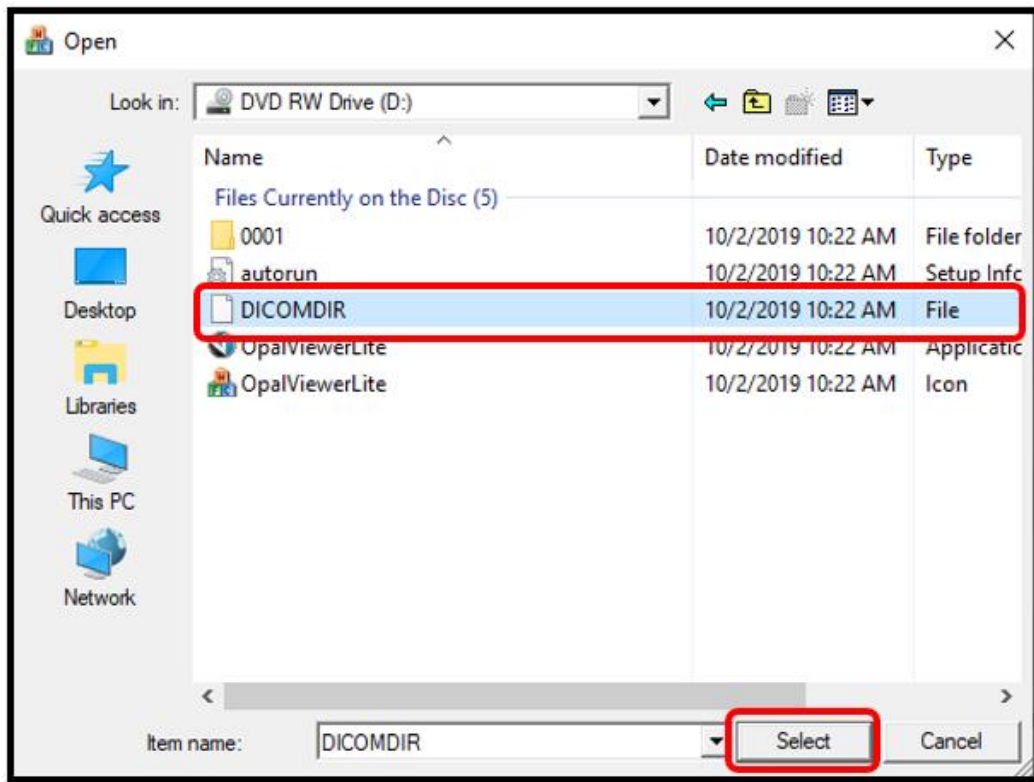
2. Select the **Always allow...** checkbox, and then select **Open Opal Import**.
3. In the **OpalImport** window, select **Modify Demographics**.



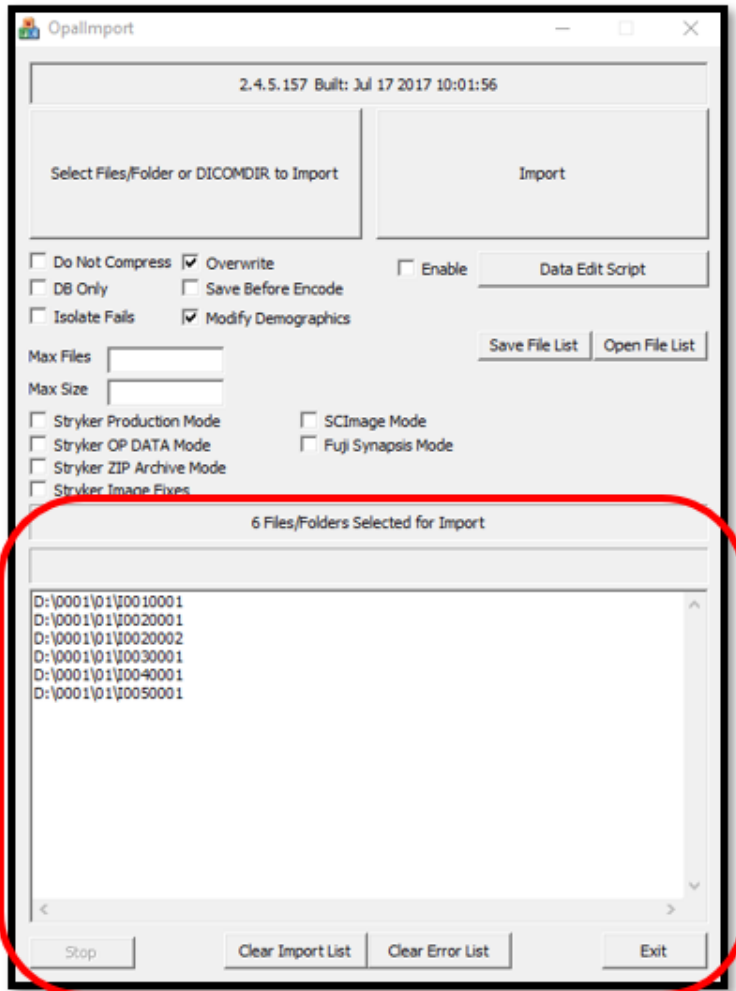
- 4. Select **Select Files/Folder or DICCOMDIR to Import**.



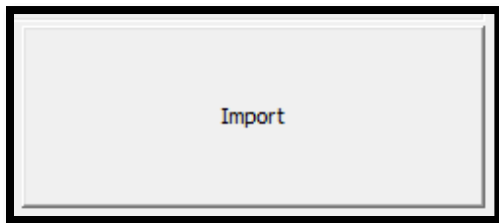
- 5. Browse for and select the DICOMDIR file.



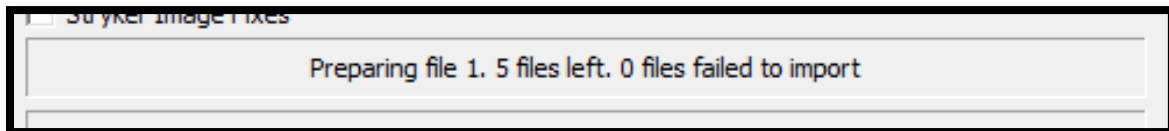
6. The selected files appear in the white box, and the status box indicates the number of files selected for import.



7. Select **Import**.



8. The status bar shows the progress of the import.



9. In the **Modify/Confirm Demographics** screen, enter your facility account number and name format and select **MODIFY**.



Modify/Confirm Demographics

Current Info

Id: [Text Box]

Name: [Text Box]

DOB: [Text Box]

Institution: INSIGHT IMAGING

New Info

Id: [Text Box]

Name: [Text Box]

Format: Lastname^Firstname^MI^Prefix^Suffix

DOB: [Text Box]

Format: YYYYMMDD (no slashes or dashes)

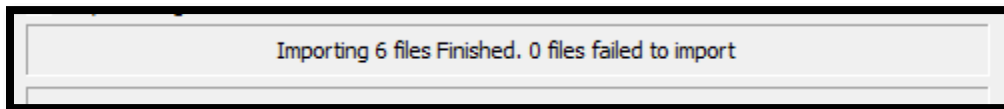
Institution: [Text Box]

DB Query

PID	Name	DOB
-----	------	-----

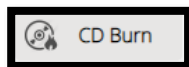
CANCEL IMPORT QUERYDB USE CURRENT MODIFY

10. The result of the import appears.



### Burn studies to a CD

1. Select the checkboxes of the studies that you want to burn to CD.

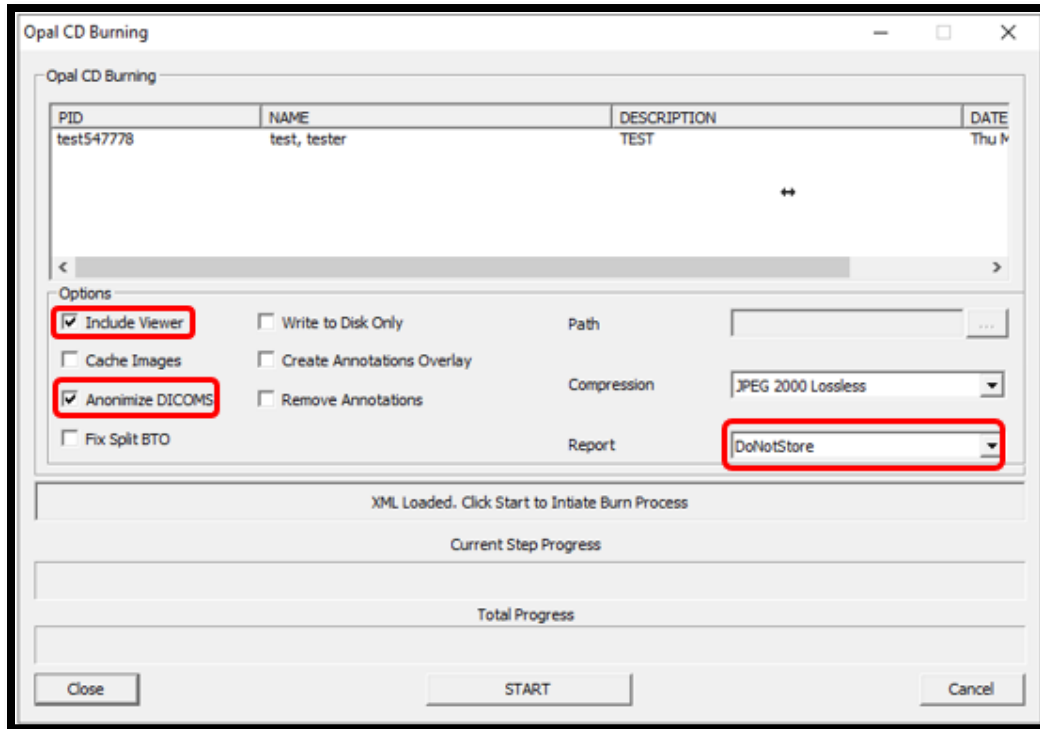


2. Select the button.

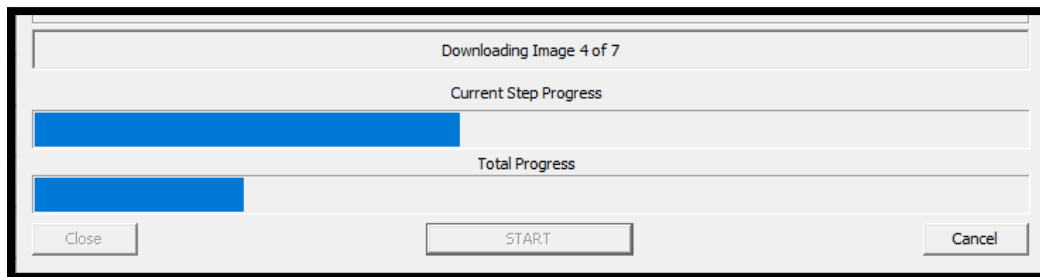
3. Select **Open OpalPreFetchListener**.

**Result:** The Opal CD Burning window appears.

4. Select **Include Viewer**.



5. In the **Report** dropdown list, select an option.
6. Insert a CD and select **START**.
7. The status bar shows progress of the burn job.



### Create worklist filters



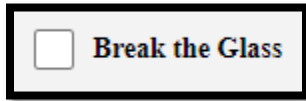
1. Select the **Create Filter** button.
2. In the **Filter Settings** screen, type a filter name, select filtering criteria, and then select **SAVE**.

3. In the message box, select **OK**.

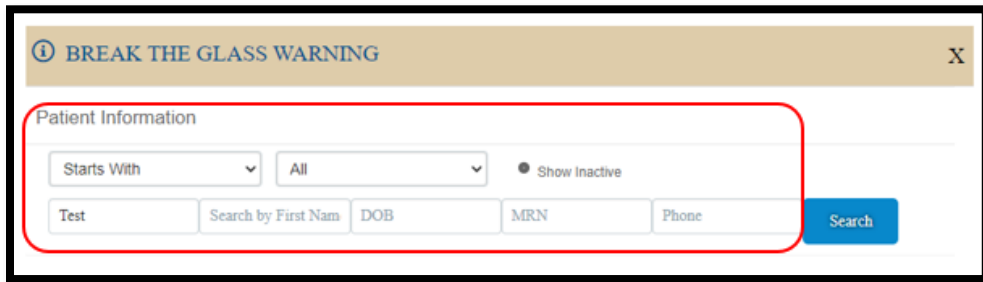
4. To manage filters, select the filter  button.

### Use Break the Glass

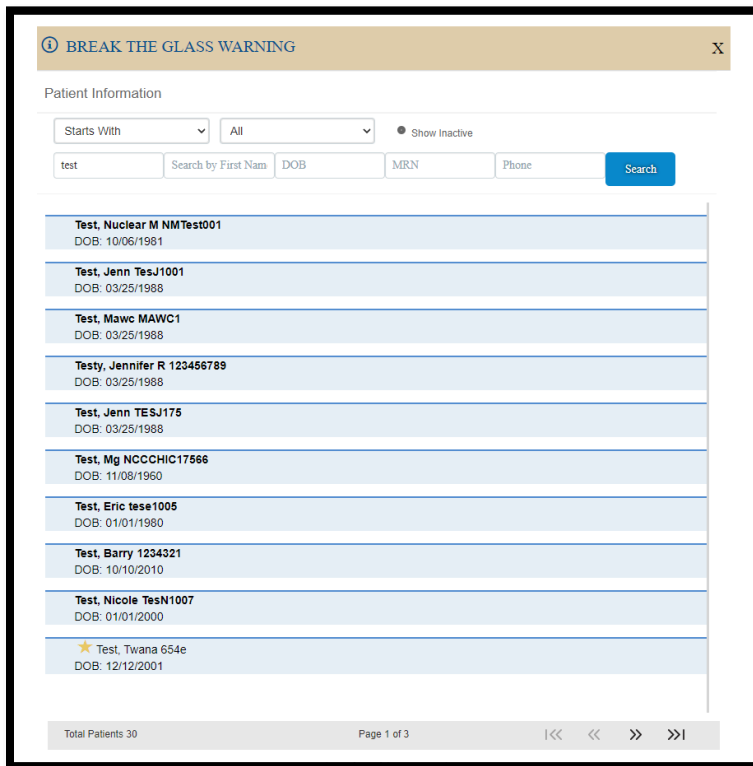
1. Select **Break the Glass** to find patient charts in which you are not the referring or CC provider.



2. In the **Break the Glass Warning** screen, enter search criteria and select **Search**.



**Result:** Matching patients appear in the list.



3. Double-click the patient whose chart you want to open.

**BREAK THE GLASS WARNING** X

You are attempting to access a patient's record that has been deemed confidential. In order to proceed, please select a reason for accessing this record.

Access Reason

Verify your credential

4. Select your **Access Reason**, enter your credentials, and then select **ACCEPT**.

### My Exams




1. Select to open the **MY EXAMS** worklist.

PATIENT NAME	DATE OF BIRTH	STUDY DESCRIPTION	STUDY STATUS	STUDY DATE	ACCESSION NO.	FACILITY	MODALITY	REFERRING PHYSICIAN
Test, Barry	10/09/2010	MRA (ANGIOGRAM) CHEST WITHOUT CON	Ordered	12/03/2021 9:52 AM EST	383	Hodenville	Magnetic Resonance	Bassett, Gallagher
Teste, Braxton O	12/15/1993	CT ABD & PELVIS W/O CONTRAST	Incomplete	07/29/2021 2:35 PM EDT	218	Konica Minolta Healthcare Americ	Computed Tomography	Test, Referring
Testy, Jennifer R	03/24/1988	Diagnostic Unilateral	Approved	03/18/2021 2:17 PM EDT	SAB000239397	Konica Minolta Healthcare Americ	Mammography	Test, Referring



The star symbol designates VIP patients.

- Select the Reload  button to update the worklist.

### Group Exams

The Group Exams worklist displays your patient, and patients of other members of your provider group.



- Select to open the **GROUP EXAMS** worklist.

PATIENT NAME	DATE OF BIRTH	STUDY DESCRIPTION	STUDY STATUS	STUDY DATE	ACCESSION NO.	FACILITY	MODALITY	REFERRING PHYSICIAN
Gator, Ade	01/31/1996	ABDOMEN X-RAY	Scheduled	11/08/2021 12:00 AM EST	376	Pineapple Under The Sea	Computed Radiography	Doctor, Tested
Nuckols, Thomas	08/18/1988	Requesting Exam	Ordered		256	Konica Minolta Healthcare Americ	Computed Radiography	Doctor, Nicole
Test, Mawc	03/25/1988	CT ABD & PELVIS W/O CONTRAST	Approved	06/16/2021 4:40 PM EDT	254	Dave's Hospital	Computed Tomography	Test, Referring
Test, Mawc	03/25/1988	CT ABD C-IC+	Approved	06/16/2021 4:40 PM EDT	204	Dave's Hospital	Computed Tomography	
Testy, Jennifer R	03/25/1988	MAMMOGRAPHY BILATERAL	Unread	11/14/2018 5:00 PM EST	209	Konica Minolta Healthcare Americ	Mammography	Test, Referring

### Pending Orders



- Select to open the **PENDING ORDERS** worklist.

PENDING ORDERS											
PATIENT NAME	DATE OF BIRTH	STUDY DESCRIPTION	STUDY STATUS	STUDY DATE	ACCESSION NO.	FACILITY	MODALITY	REFERRING PHYSICIAN	ORDERING FACILITY	REASON	JUSTIFICATION OF SER
<input type="checkbox"/> Tester, Braxton O	12/15/1993	Requesting Exam	Ordered		392	Eric's Best Practice	CT	Doctor, David		Patient has abdominal pain	
<input type="checkbox"/> Tasty, Jennifer R	03/24/1988	Requesting Exam	Ordered		391	Eric's Best Practice	MR	Doctor, David		Frequent headaches	

### Pending Appointments

The Pending Appointments worklist displays a list of your patients and the status of their orders and appointments.



- Select to open the **PENDING APPOINTMENTS** worklist.

PENDING APPOINTMENTS											
PATIENT NAME	DATE OF BIRTH	STUDY DESCRIPTION	STUDY STATUS	STUDY DATE	ACCESSION NO.	FACILITY	MODALITY	REFERRING PHYSICIAN	ORDERING FACILITY	REASON	JUSTIFICATION OF SER
Tester, Braxton O	12/15/1993	Requesting Exam	Ordered		392	Eric's Best Practice	CT	Doctor, David		Patient has abdominal pain	
Tasty, Jennifer R	03/24/1988	MRI ABD C-C+	Scheduled	11/11/2021 8:00 AM	391	Hodenville	MR	Doctor, David		Frequent headaches	

### Order an exam

Select the icon to create a new order.

1. Enter criteria for the patient, and select **Search**.

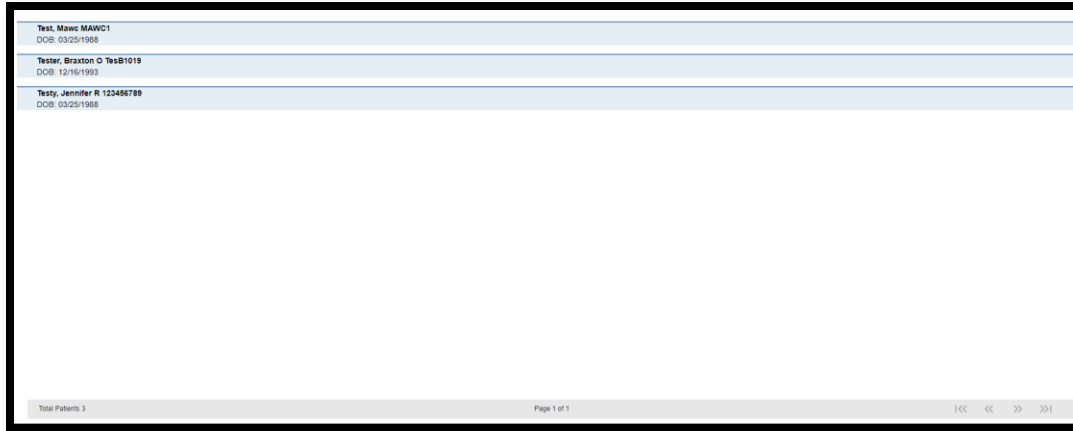
**NOTE:** If this is the first time to order an exam for the patient, you must use **Break the Glass**.

Patient Information CREATE AND SCHEDULE

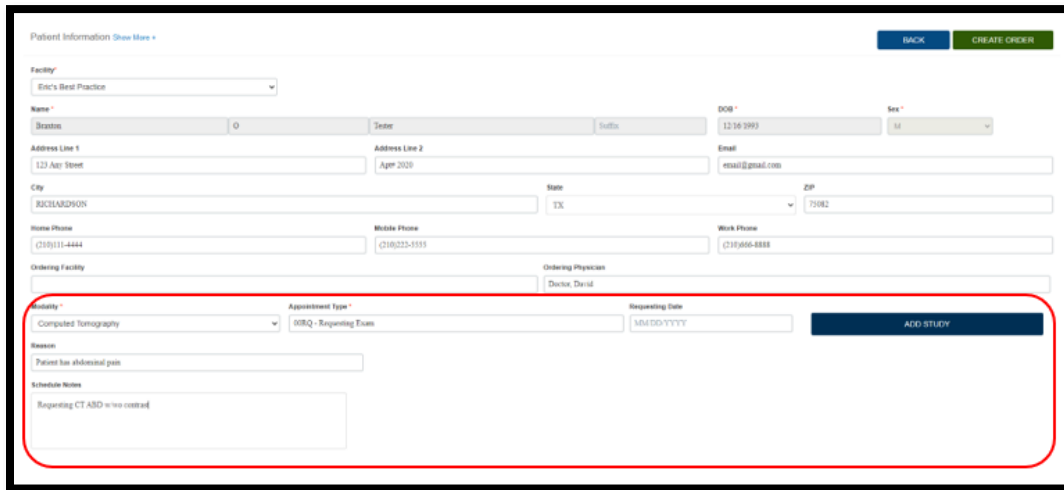
Starts With: [dropdown] All [dropdown]  Show Inactive  Break the Glass

Search by First Name |  DOB |  MEN |  Phone |

**Result:** Patients matching your criteria appear in a list.



2. Double-click a patient to open their chart.



- 3. Enter required information and then select **ADD STUDY**.
- 4. Optional. Repeat to add more exams to the order.
- 5. Select **CREATE ORDER**.



**Result:** The ORDER SUMMARY window appears.



**ORDER SUMMARY** X

<p><b>Patient Details</b></p> <p><b>Tester, Braxton O</b></p> <p>DOB   GENDER : 12/16/1993   M                  Address Line 1 : 123 Any Street                  Address Line 2 : Apt# 2020                  City/State/Zip : RICHARDSON TX / 75082                  Home Phone# : (210)111-4444                  Mobile # : (210)222-5555                  Work Phone# : (210)666-8888                  Email : email@gmail.com</p>	<p><b>Physician Details</b></p> <p><b>Doctor, David</b></p> <p>Address line 1 : 123 Any Street                  Address line 2 :                  City/State/ZIP : RICHARDSON / TX / 75082                  Phone no :                  Fax no :</p>	<p><b>Map Location</b></p>
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**Appointment Details**

Your order has been created successfully

Location : Eric's Best Practice      Type : Pre Order  
 Date :      Status : Ordered

- If a document is available for uploading, select **UPLOAD**, and then see **Upload a document** below. Otherwise, select **CLOSE**.

### Add a document to an exam

You can add a scanned document (such as an order form) to an exam.

- In the **MY ACCOUNT** window, select a document type.
- Optional. Enter notes.
- Under **Linked Study**, select to which exam you want to add the document.

**MY ACCOUNT** X

**Document Type**

Order v

**File**

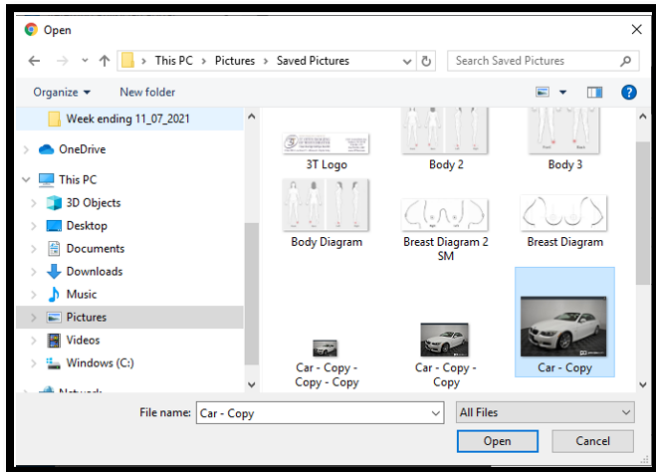
**Linked Study**

**Notes**

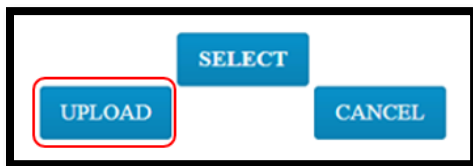
Script for CT ABD

Accession No.	Description	Mod Study Date
<input checked="" type="radio"/> 392	Requesting Exam	CT
<input type="radio"/> 391	Requesting Exam	MR
<input type="radio"/> 390	ABDOMEN X-RAY	CR 08/09/2021
<input type="radio"/> 386	Requesting Exam	DX 11/08/2021
<input type="radio"/> 383	MRA (ANGIOGRAM) CHEST WITHOUT CONTRAST	MR
<input type="radio"/> 381	ULTRASOUND BREAST BILATERAL COMPLETE	US 11/08/2021
<input type="radio"/> 376	ABDOMEN X-RAY	CR 11/07/2021
<input type="radio"/> 376	ABDOMEN X-RAY	CR 11/07/2021

4. Select **SELECT**, and then browse for and select a document to add.



5. Select **UPLOAD**.



**Result:** The document is added to the exam, and the patient document list appears.

PATIENT DOCUMENTS FOR TESTER, BRAXTON					
DOCUMENT TYPE	DOCUMENT SOURCE	IMPORT/UPLOAD DATE	CREATED DATE	CREATED BY	REQUESTED BY
Order	User Upload	11/10/2021 10:38 AM EST	11/10/2021 10:37 AM EST	Doctor, David	
Order	User Upload	09/17/2021 2:04 PM EDT	09/17/2021 2:03 PM EDT	Viztek, Pacs	Patient

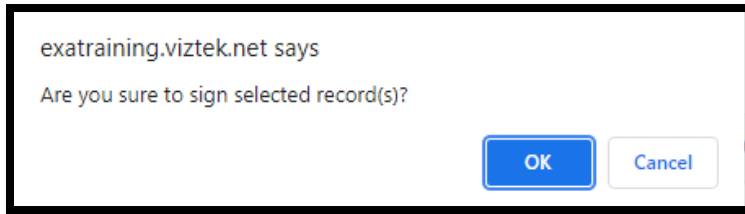
### Sign an order

1. In the worklist, select the exam you want to sign.

PATIENT NAME	DATE OF BIRTH	STUDY DESCRIPTION	STUDY STATUS	STUDY DATE	ACCESSION NO	FACILITY	MODALITY	REFERRING PHYSICIAN	ORDERING FACILITY	REASON	JUSTIFICATION OF SER
<input checked="" type="checkbox"/> Tester, Braxton O	12/15/1993	Requesting Exam	Ordered		392	Eric's Best Practice	CT	Doctor, David			Patient has abdominal pain

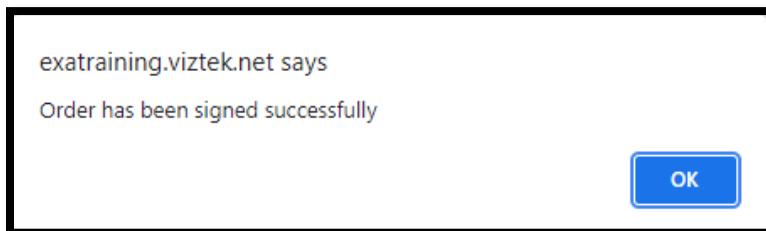


2. Select the button.
3. In the message window, select **OK**.



**Result:** The order is signed.

4. Select **OK**.




**Result:** The order is removed from the PENDING ORDERS worklist.

### Sub Menu

From the sub-menu you can view the activity log and your account profile.



1. Select  to open the sub-menu. worklist.
2. Select the following buttons to use features. See topics below for details.

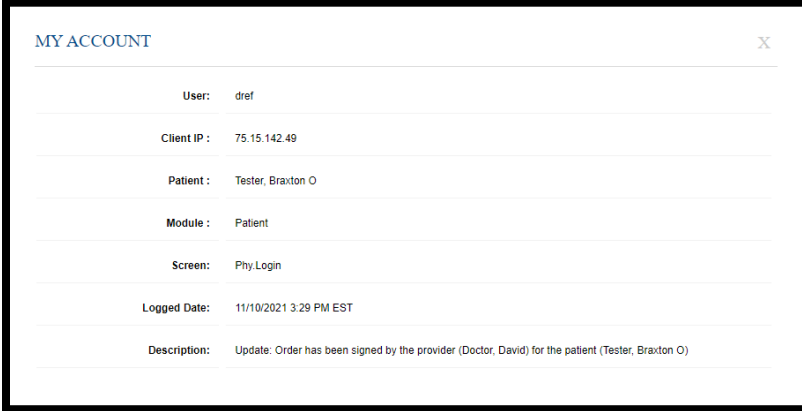


### View the activity log

Users with certain rights can view an audit log of their activity in the portal.



1. Select the  button.
2. Select the **View** link.



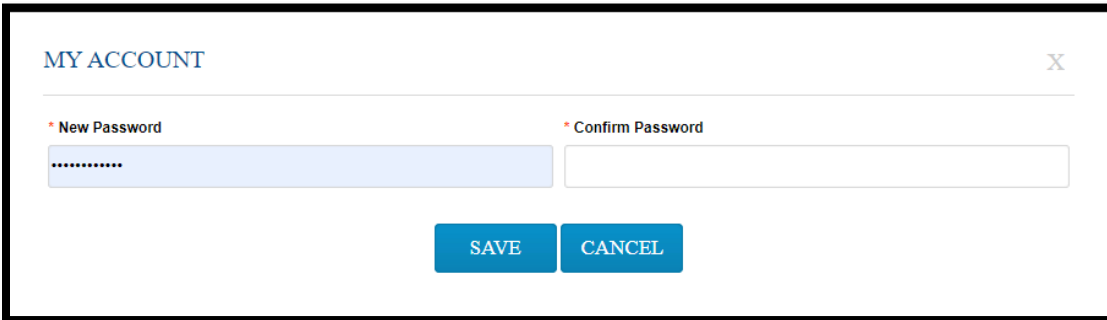
MY ACCOUNT X

User:	dref
Client IP :	75.15.142.49
Patient :	Tester, Braxton O
Module :	Patient
Screen:	Phy.Login
Logged Date:	11/10/2021 3:29 PM EST
Description:	Update: Order has been signed by the provider (Doctor, David) for the patient (Tester, Braxton O)

## Reset a password



1. Select the button.



MY ACCOUNT X

\* New Password

\* Confirm Password

2. Type the new and password twice, and then select **SAVE**.

## Edit your account profile



1. Select the button.

The screenshot shows a 'MY ACCOUNT' settings page with a close button (X) in the top right. The page is titled 'Edit User Settings' and includes an 'Email:' label. The form contains several input fields: 'Name' (with sub-fields for 'David', 'MI', 'Doctor', and 'Suffix'), 'Title', 'Dr. Office Name', and 'Phone No.' (with '(210)222-3333' entered). Below these are fields for 'NPI No.', 'Federal Tax ID', 'Taxonomy Code', 'EIN No.', 'SSN', 'medicareUPIN', 'License No.', 'Medicaid Provider No.', and 'Medicare Provider No.'. At the bottom are 'SAVE' and 'CANCEL' buttons.

2. Edit settings and select **SAVE**.

### Burn studies to a CD

See “Burn studies to a CD” earlier in this document.

### Import images

See “Import images” earlier in this document.

### Patient List



1. Select the button.

**Result:** The PATIENT LIST appears.

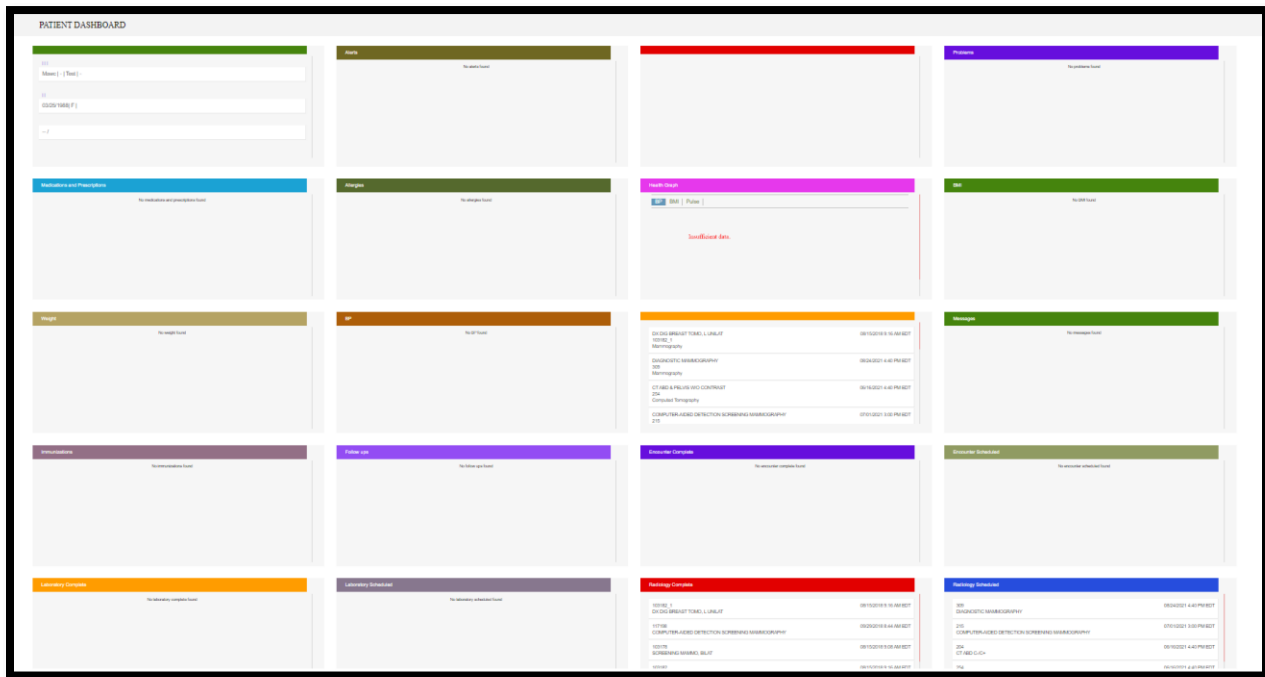
The screenshot shows a table titled 'PATIENT LIST' with a refresh icon in the top right. The table has columns for 'PATIENT NAME', 'DOB', 'SEX', 'ACCOUNT NO.', and 'ADDRESS'. The first row is highlighted in blue and contains the text 'vizek'. Below it are five rows of patient data, each with a star icon and a lock icon in the first column.


PATIENT NAME	DOB	SEX	ACCOUNT NO.	ADDRESS
* Test, Mawc	03/25/1988	F	MAWC1	101 main streeer
* Tester, Braxton	12/16/1993	M	TestB1019	123 Any Street , Apt# 2020
* Nuckolis, Thomas	08/18/1988	M	nucd1002	123 Fake Street
* Gator, Ade	01/31/1996	F	GatA1044	
* Testy, Jennifer	03/25/1988	F	123456789	123 ABC St



2. Select the button to view the **PATIENT DASHBOARD**.

On the dashboard, you can select a patient chart to open it.



3. Select the  button to upload documents for the patient (see “Add a document to an exam” earlier in this document).

PATIENT DOCUMENTS FOR TESTER, BRAXTON 🔍 🔄

DOCUMENT TYPE	DOCUMENT SOURCE	IMPORT/UPLOAD DATE	CREATED DATE	CREATED BY	REQUESTED BY
All	All				
Order	User Upload	11/10/2021 10:38 AM EST	11/10/2021 10:37 AM EST	Doctor, David	
Order	User Upload	09/17/2021 2:04 PM EDT	09/17/2021 2:03 PM EDT	Viztek, Pacs	Patient