KONICA MINOLTA HEALTHCARE IT

Symmetry® PACS

1.4.33_P6

User's Manual

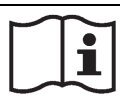
500-000921A

Table of Contents

Introduction

Symbols

The following symbols may appear in the product documentation or on the product.

Symbol	Symbol Name	Symbol Description	Standard Number and Name	Symbol Reference Number
	Manufacturer	Indicates the name and address of the manufacturer	ISO 15223-1:2021	5.1.1
EC REP	Authorized Representative in the European Economic Area (EEA)	Indicates the Authorized Representative, responsible for the device in the European Economic Area (EEA).	ISO 15223-1:2021	5.1.2
	Date of Manufacture	Indicates the date when the device was manufactured.	ISO 15223-1:2021	5.1.3
	Caution	Indicates information that is important for preventing loss of data or misuse of the software.	ISO 15223-1:2021	5.4.4
LOT	Batch Code	Indicates the full Software Release / Version number	ISO 15233-1:2021	5.1.5
SN	Serial number	Indicates the manufacturer's serial number so that a specific medical device can be identified	ISO 15233-1:2021	5.1.7
REF	Catalogue Number	Indicates the manufacturer's catalogue number so that the device can be identified	ISO 15233-1:2021	5.1.6
	Consult instructions for use	Indicates the need for the user to consult the instructions for use	ISO 15233-1:2021	5.4.3
 Only	Prescription Device	Caution: Federal law restricts this device to sale by or on the order of a licensed healthcare practitioner	21 CFR 801.109(b)(1) Prescription Devices	N/A

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

Indications for use

EXA™ is a software device that receives digital images and data from various sources (i.e. CT scanners, MR scanners, ultrasound systems, R/F Units, computed & direct radiographic devices, secondary capture devices, scanners, imaging gateways or other imaging sources). Images and data can be stored, communicated, processed, and displayed within the system and or across computer networks at distributed locations. Lossy compressed mammographic images are not intended for diagnostic review. Mammographic images should only be viewed with a monitor cleared by FDA for viewing mammographic images. For primary diagnosis, post process DICOM "for presentation" images must be used. Typical users of this system are trained professionals, nurses, and technicians.

Training

Users of this software must have received adequate training on its safe and effective use before attempting to operate the product described in this Instructions for Use. Users must make sure they receive adequate training in accordance with local laws or regulations.

Regulatory and compliance

Konica Minolta Healthcare Americas, Inc.

2217 U.S. Highway 70 East

Garner, NC 27529 USA

Tel: 1-800-366-5343

System requirements

The following are the minimum system requirements for the Exa and Symmetry platforms. The minimum deployment now requires four physical or virtual servers. The workstation requirements are based on typical usage scenarios. For the recommended requirements of your specific implementation, contact your Konica Minolta representative.

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

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

HAProxy Server

Resource	Specification	Comments
Cores/Logical Processors	2/4	Intel® Xeon® @ 2.20 GHz
RAM	4 GB	
OS	Rocky Linux 9	
Network	1 GbE	Recommend redundant links where possible
Storage - System	64 GB	Storage Tier - Standard Storage: If virtualizing, storage volume must be thick provisioned.

Application Server

Resource	Specification	Comments
Cores/Logical Processors	4/8	Intel® Xeon® @ 2.20 GHz
RAM	32 GB	
OS	Windows Server 2022	
Network	1 GbE	Recommend redundant links where possible
Storage System Application Cache Data	 150 GB 64 GB 500 GB 1 TB*	 Storage Tier - Performance Storage Tier - Performance Storage Tier - Performance Storage Tier - Standard
* Size to fit legacy data + projected future volume (including growth).		Storage: If virtualizing, storage volume must be thick provisioned.

Database Server

Resource	Specification	Comments
Cores/Logical Processors	4/8	Intel® Xeon® @ 2.20 GHz
RAM	32 GB	
OS	Rocky Linux 9	
Network	1 GbE	Recommend redundant links where possible
Storage System PG-Data PG-WAL	 64 GB 500 GB 24 GB	 Storage Tier - Performance Storage Tier - Performance Storage Tier - Performance Storage: If virtualizing, storage volume must be thick provisioned.

Redis Server

Resource	Specification	Comments
Cores/Logical Processors	2/4	Intel® Xeon® @ 2.20 GHz
RAM	4 GB	
OS	Rocky Linux 9	
Network	1 GbE	Recommend redundant links where possible
Storage System	 64 GB	 Storage Tier - Performance Storage: If virtualizing, storage volume must be thick provisioned.

Storage Tier

Tier	Drive	RAID Level	IOPS Target	Comments
Performance	SSD	1/10	30,000+	
Standard	10 K SAS/SATA	1/6	300+	RAID 1 acceptable when total usable space fits on one drive.

Storage Volume

Volume	Purpose
System	Operating system. Includes paging file by default.

Volume	Purpose
Application	Application installation. Contains installation and log files.
Cache	Short-term image cache to maintain high performance of the image rendering service.
PG-Data	Dedicated database data.
PG-WAL	Dedicated database write-ahead log (WAL).
Data	Long-term data archive. Contains all image, document, and database backup files.

Workstation - User

Component	Specification
CPU	Intel® Core™ series, 4 cores, 8 threads @ 3.0 GHz
RAM	8 GB
Graphics	Integrated - Intel Iris Xe Graphics card must be compatible with and support required resolution on each display, as well as total resolution for all displays.
NIC	Single 1000 MB/s
Storage	SDD, 256 GB
OS	Windows 11 Pro
Display	16:9 Aspect Ratio, 1920 × 1080

Workstation – Reading Radiologist

Component	Specification
CPU	Intel® Core™ or Xeon™ series, 8 cores, 16 threads @ 3.6 GHz
RAM	32 GB 48 GB when using local cache
Graphics	Dedicated - 4 GB, 4x DP or 4x mDP Graphics card must be compatible with and support required resolution on each display, as well as total resolution for all displays.
NIC	Single 1000 MB/s
Storage	SDD 1 TB: Standard 2 TB: For mammography
OS	Windows 11 Pro
Display	16:9 Aspect Ratio, 1920 × 1080
Diagnostic Displays	Based on use case following the ACR standard.

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://kmha360.my.site.com/customersupport/

Monitored: 8:00 AM–8:00 PM EST

For urgent issues, please call the Hotline.

Getting started

This chapter contains the following sections.

Configure your working environment

Before using Symmetry PACS, you must sign in and configure settings and information tailored to your company and workflow for use 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

To set up credentials, browser, monitors, and other settings, see the following topics in this section.

Configure the language in Chrome

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

Procedure

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.

Turn off Chrome autofill

Chrome may automatically fill in passwords, patient information, and other text in various parts of the program. This can be a security, privacy, and functional risk, therefore we highly recommend turning off these features.

Passwords

1. In the Chrome menu, select Settings.
2. Select Autofill and passwords > Google Password Manager > Settings.
3. Turn Offer to save passwords off.

Payment methods

1. In the Chrome menu, select Settings.
2. Select Autofill and passwords > Payment methods.
3. Turn off Save and fill payment methods.

Addresses and more

1. In the Chrome menu, select Settings.
2. Select Autofill and passwords > Addresses and more.
3. Turn off Save and fill addresses.

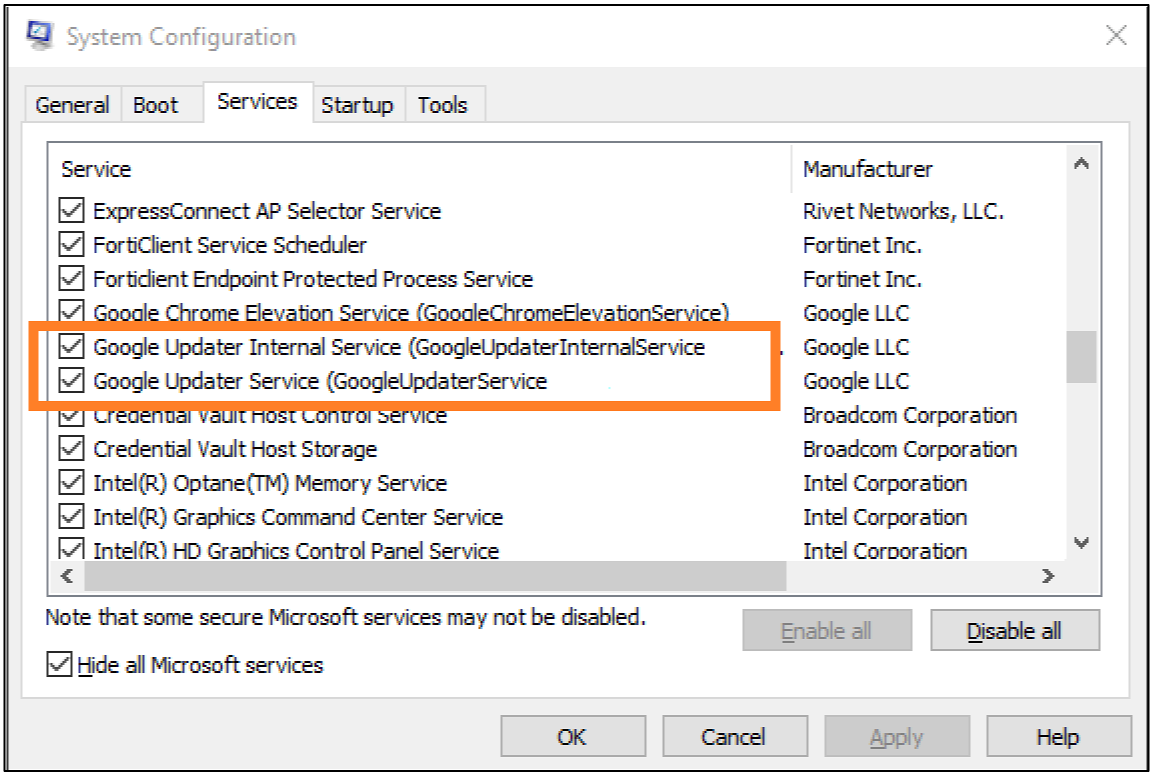
Turn off Chrome autosave

When Google Chrome automatically updates, the functionality of your Exa platform product can be negatively affected. To prevent this, we recommend that you turn off automatic updates in Chrome by following these steps:

Procedure

1. In Windows, press Windows + R.
2. In the Run dialog, type `msconfig` and press Enter.

3. In System Configuration, on the Services tab, select the Hide all Microsoft services checkbox.



4. Clear the Google Updater Internal Service and Google Updater Service checkboxes.

5. Select Apply, OK.

6. If prompted, restart your computer.

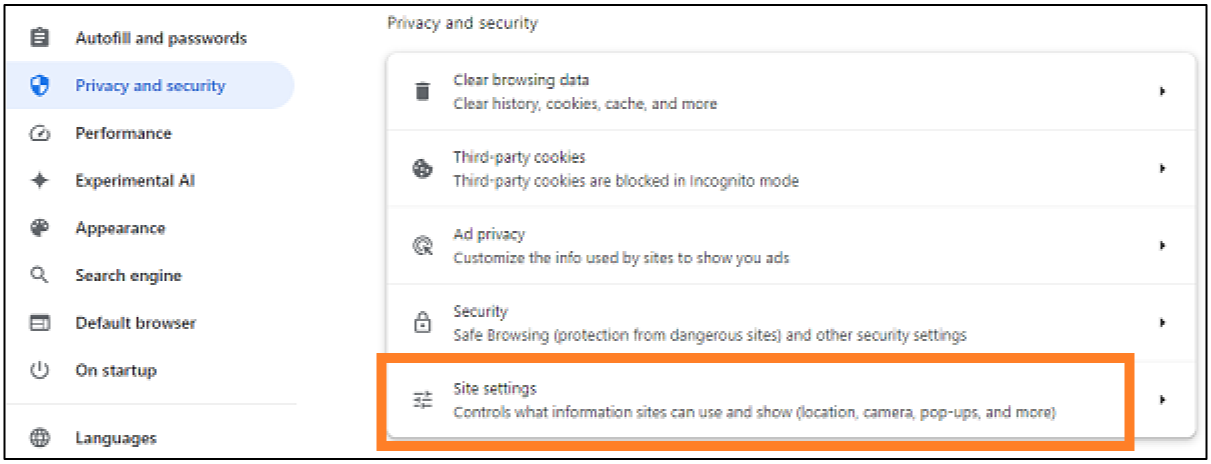
Other Chrome settings

When using multiple monitors, the program uses pop-ups to display the viewer and multi-panel, therefore you need to configure Chrome to allow pop-ups. Also, optional memory and power settings may increase your performance under certain conditions.

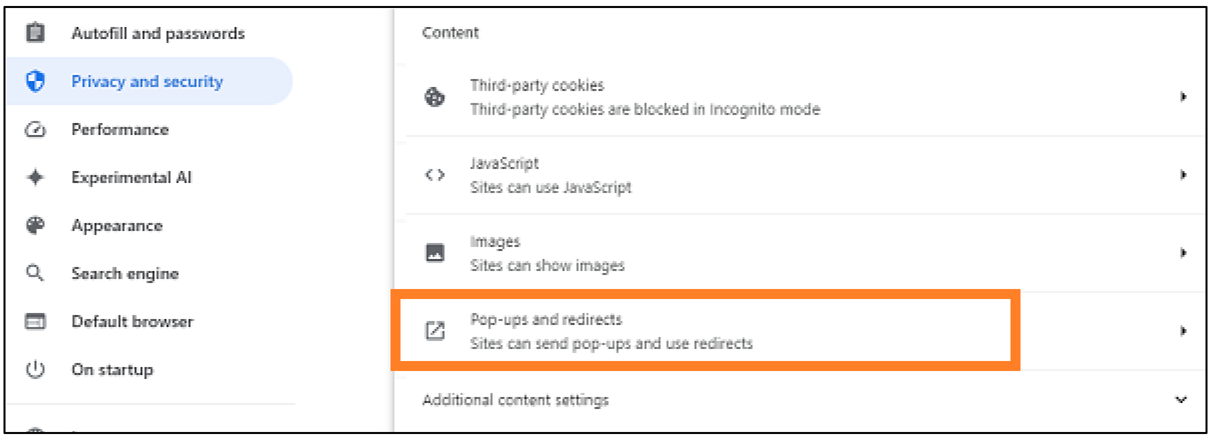
Pop-ups and redirects

1. In the Chrome menu, select Settings > Privacy and security.

2. Under Privacy and security, select Site settings.



3. Under Content, select Pop-ups and redirects.

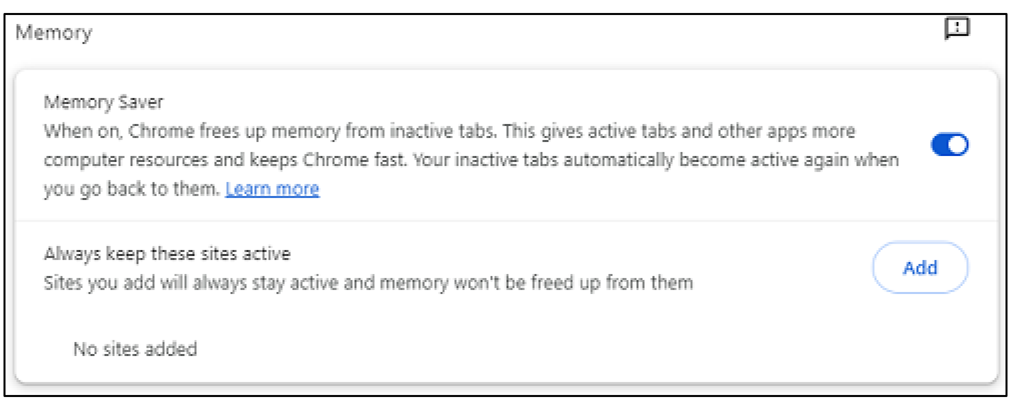


4. Select Sites can send pop-ups and use redirects.

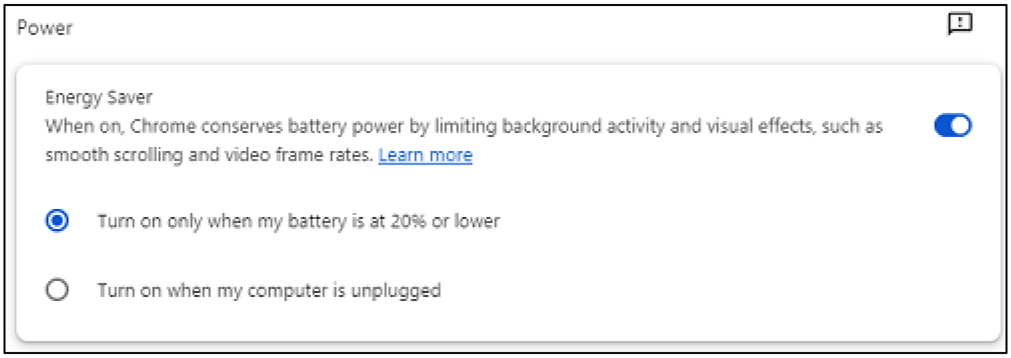
Memory and Power

You can try Memory Saver if you open a lot of tabs in Chrome. You can try Energy Saver if you use a laptop when not plugged in.

1. In the Chrome menu, select Settings > Performance.
2. Under Memory, turn on Memory Saver.

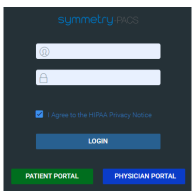


3. Under Power, turn on Energy Saver.



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

Administrators can use two-factor authentication (2FA) to increase security by requiring an additional sign-in procedure. During sign-in, Symmetry PACS sends an *authentication token (or "code")* to your email address, or one is generated by the Google Authenticator app. 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, configure the user’s email address and user name. For further details, see the 2FA configuration manual.

See also:

[Create a user](#)
[Edit your user profile](#)
[Sign in using 2FA with email](#)
[Sign in using 2FA with Google Authenticator](#)

Sign in using 2FA with email

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

Procedure

1. Sign in to Symmetry PACS in the usual manner.
2. In the EMAIL VERIFICATION PENDING box, paste the verification code and select VERIFY.

   Result: Symmetry PACS signs you out.
3. Sign back in to Symmetry PACS, select the email option, and then select REQUEST TOKEN.
4. 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.

Caution: Follow these steps correctly or the setup key (the text portion of the QR code) may become useless for subsequent users.

Procedure

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 account password, and then select SHOW QR CODE.
4. In Google Authenticator, tap Scan a QR Code, and then scan the code on screen.
5. 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.

Procedure

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.
4. 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, such as your user profile and Exa Chat.

Prerequisite: Prepare a PNG image to use as the avatar.

Procedure

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

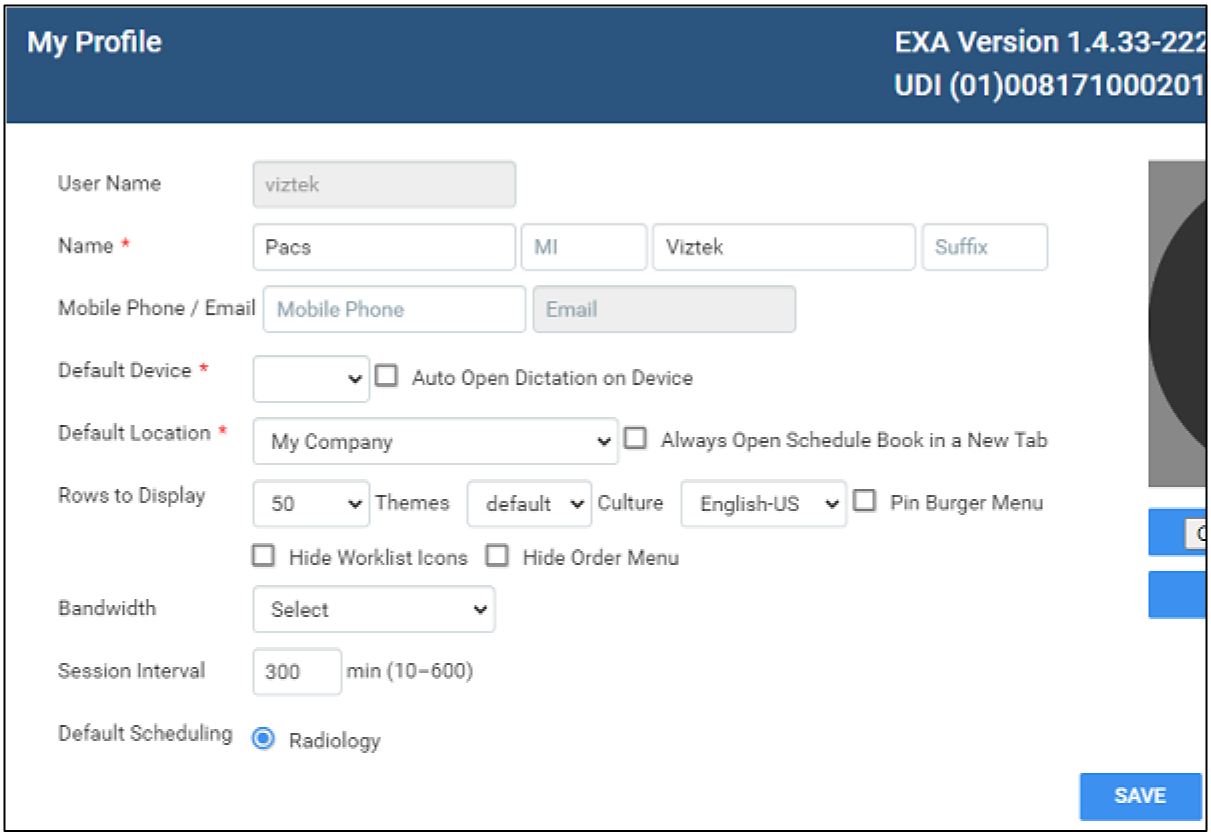
Each user of Symmetry PACS has a profile with sign-in credentials and basic customization settings. After signing in, you can view and edit your settings.

Procedure

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).

Result: The My Profile screen appears.



3. 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 automatically open a new browser tab for the schedule book 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.
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.

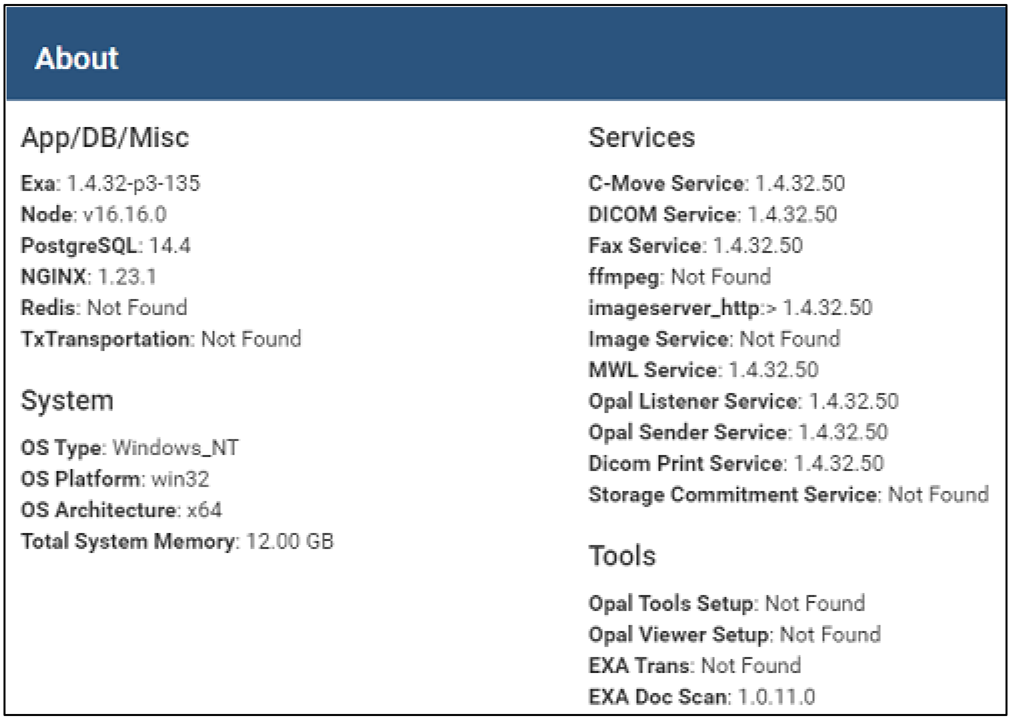
View version information

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

Procedure

1. Select the burger button.
2. At the bottom of the burger menu, select the white Konica Minolta globe.

   Result: The About screen appears.



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.

Procedure

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. See Set up connected displays.

Procedure

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, 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.

Configure Symmetry PACS

This chapter includes the following sections with topics on core items to review or configure prior to using Symmetry PACS.

Set up the office: Companies
Set up the office: Other assets
Configure providers and resources
Configure scheduling and codes
Configure DICOM settings
Manage users
Configure general settings
Configure the viewer

For other settings, see the following topics.

See also:

Worklist settings
User settings

Set up the office: Companies

Company here means the parent hospital, clinic, or other institution where Symmetry PACS is installed. Configure your company and then 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.

This section contains the following topics (not all topics may be available depending on version and region).

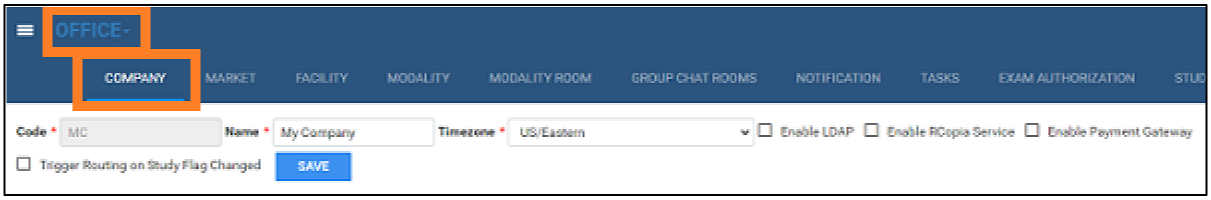
Configure your company
General settings
Settings
App settings
Reason codes
MRN information
Accession information
AE filter
HL7
Password management
Modifiers

Configure your company

To use Symmetry PACS you must configure your company as follows.

Procedure

1. Go to SETUP > OFFICE > Office > COMPANY.



2. 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	Exa PACS/RIS only.
Enable RCopia Service	Exa PACS/RIS only.
Enable Payment Gateway	Exa PACS/RIS only.
Trigger Routing on Study Flag Changed	Select to reprocess routing (DICOM transactions) automatically when a user changes a study flag.

3. Select SAVE.

4. Enter additional information as needed by following the steps in later subsections (see Set up the office: Companies).

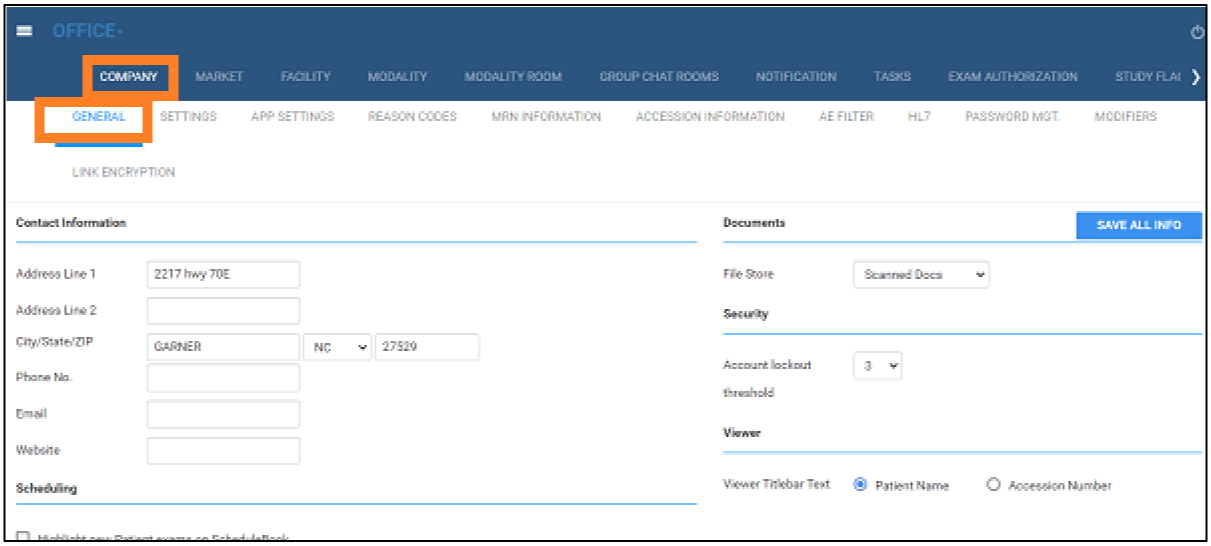
> Note: When finished, select SAVE again at the top of the screen on the right side of the Trigger Routing on Study Flag Changed checkbox.

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. For forms, email and notification templates, db tools, report queue, and other topics, see Configure general settings.

Procedure

1. Go to SETUP > OFFICE > Office > COMPANY > GENERAL.



2. Enter the following settings.

Caution: A password is configured or used on this page. For recommended security, turn off Chrome autofill.

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.	US only. 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.

Setting	Description	
	ICD9 to ICD10	Select to automatically convert diagnostic codes from the ICD9 to ICD10 standard.
	Sales Tax	Type the tax rate at the company's address, as a percentage (e.g. type 07.50 for "seven and one-half percent").
Documents	File Store	Select a file store for scanned documents at your company. This is separate from the file store used by AEs to store images.
Security	Account Lockout Threshold	Set the maximum number of sign-in attempts.
Viewer	Viewer Titlebar Text	Select to display the patient name or the accession number on the title bar when opening a study in the viewer.
Peer Review	Schedule (how often studies are assigned to be peer-reviewed)	Select the frequency at which studies are automatically drawn and assigned for peer review. To customize, select Custom settings, and then enter the cron settings below.
	Cron custom settings	Available when you select Custom settings in the Schedule dropdown list. Type a custom frequency for assigning peer reviews by entering values in the boxes: seconds, minutes, hours, day of the month, month, and day of the week.
	Peer Review Percentage of yearly approvals	Type the percentage of approved studies to add to the initial draw pool each draw.
	Studies per draw amount	Type how many studies to draw from the draw pool. These studies are distributed randomly to peer reviewers. Any studies left over (that are not drawn) remain in the draw pool for the next draw.
	Cutoff period	The number of days in the past from which Peer Review draws studies (the maximum age of the study).
	Interval	Type how often to check whether the conditions are met to start the draw process, in milliseconds.
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.

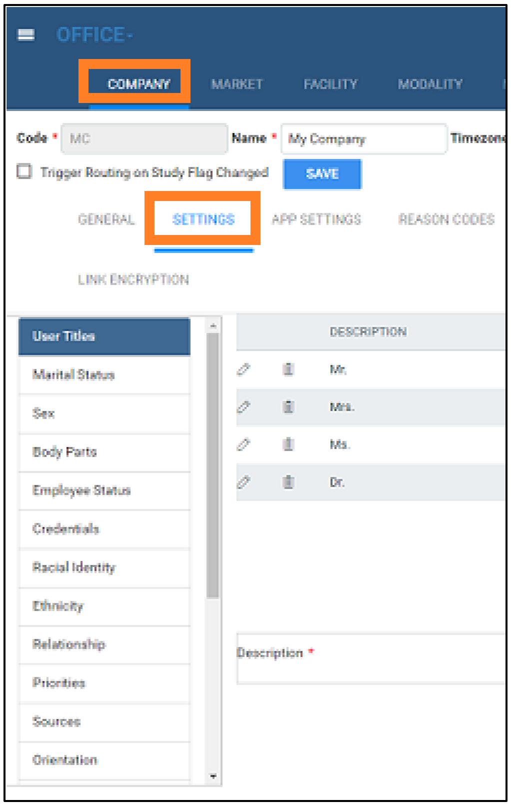
4. Select SAVE ALL INFO.

Settings

Settings here means presets that appear as options, mostly related to people (such as staff and patients). You can preconfigure them for use in various parts of the program.

Procedure

1. Go to SETUP > OFFICE > Office > COMPANY > SETTINGS.



2. On the left pane, select a category.

3. At the bottom of the screen, in the Description box, type a setting. The following table describes the setting for each category.

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.

Setting	Description
Relationship	Relationships of people to patients (including self).
Priorities	Priorities that can be assigned to studies in the worklist. These are separate from stat levels.
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.

4. Select SAVE.

App settings

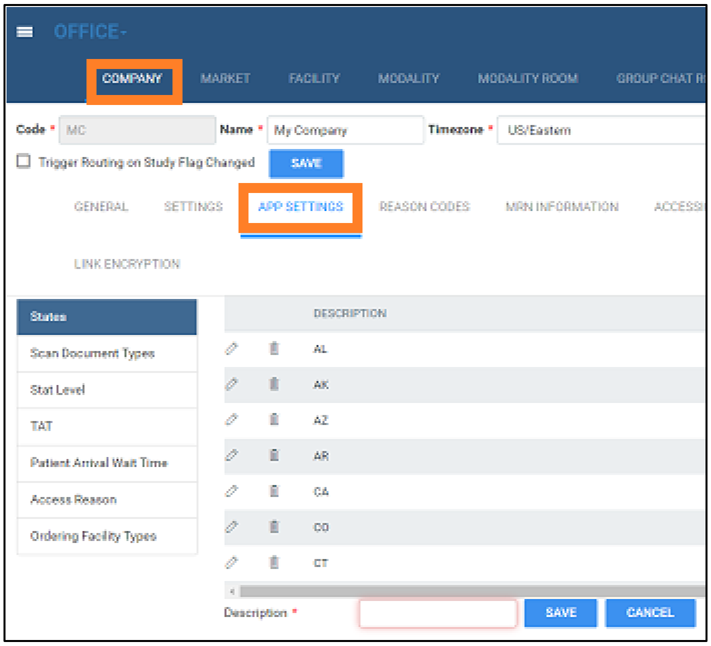
App settings here means presets that you can preconfigure for use in other parts of the program.

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 table below, select the value of the (0040,1003) Requested Procedure Priority tag to translate "from" in inbound DICOMs, and to translate "to" in outbound DICOMs.

Procedure

1. Go to SETUP > OFFICE > Office > COMPANY > APP SETTINGS.



2. In the list on the left side of the screen, select a setting.

3. For each option in the following table, enter settings.

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).
	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	Use to "translate" the DICOM Requested Procedure Priority (0040,1003) of inbound studies to the stat levels you configure in Exa PACS/RIS. Select the requested procedure priority of inbound studies to assign to the stat level you are configuring.
	Outbound DICOM	Use to "translate" the stat level of outbound studies to the corresponding DICOM Requested Procedure Priority (0040,1003). 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.	

Setting	Options	Description
	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."

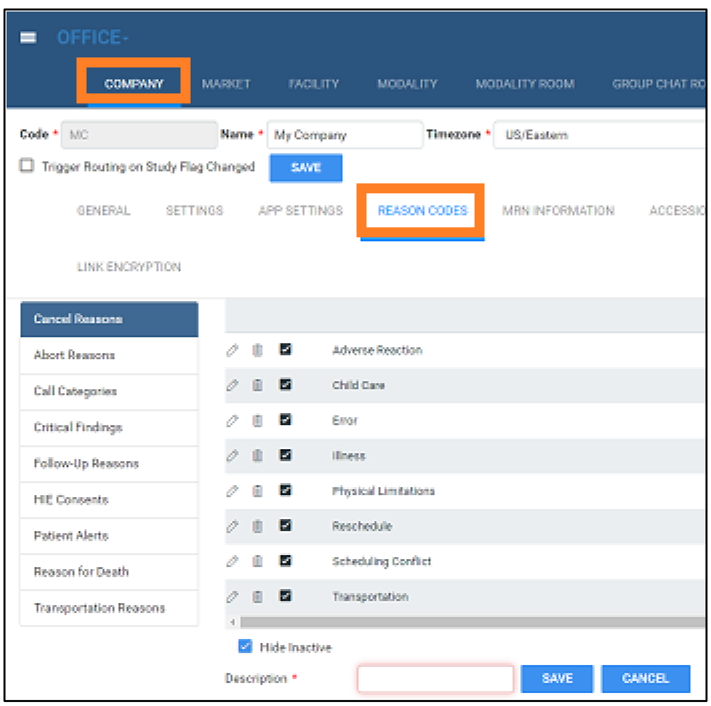
4. Select SAVE.

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.

Procedure

1. Go to SETUP > OFFICE > Office > COMPANY > REASON CODES.



2. On the left pane, select a category.

3. On the right pane at the bottom, type a reason.

4. 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.
Schedule Rule Reasons	Description	Type reasons to use when writing schedule rules to make a timeslot unavailable, such as "Machine maintenance."
	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."

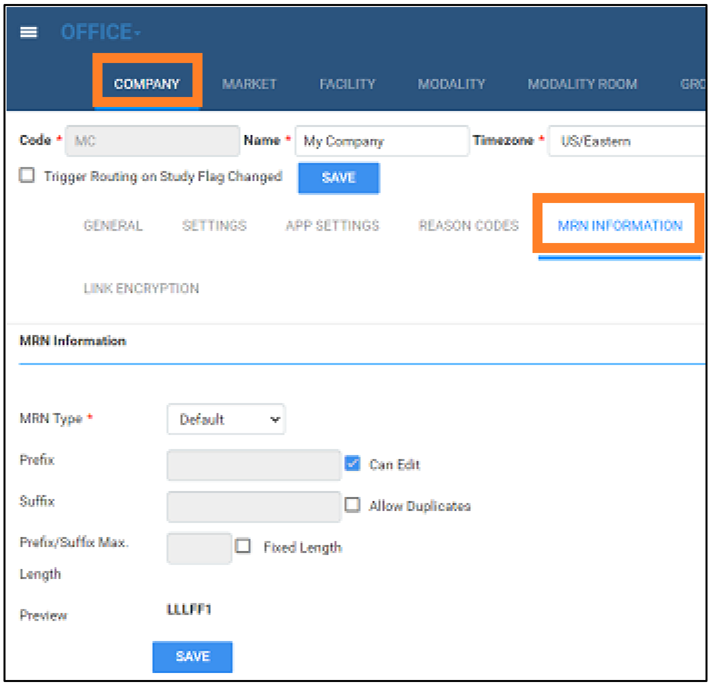
5. Select SAVE.

MRN information

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

Procedure

1. Go to SETUP > OFFICE > Office > COMPANY > MRN INFORMATION.



2. Enter the following settings.

Setting	Description
MRN Type	Select Default to use the default formatting included with Exa PACS/RIS, or Custom to define your own formatting.
Prefix	Type a prefix to prepend to the MRN. To be able to modify the prefix, select Can Edit.
Suffix	Type a suffix to append to the MRN.
Allow Duplicates	Select to allow duplicate MRNs.
Prefix/Suffix Max.	Select Fixed Length (above), and then type or select the maximum length of the MRN prefix and suffix.
Fixed Length	Select to enter a maximum length of the MRN.

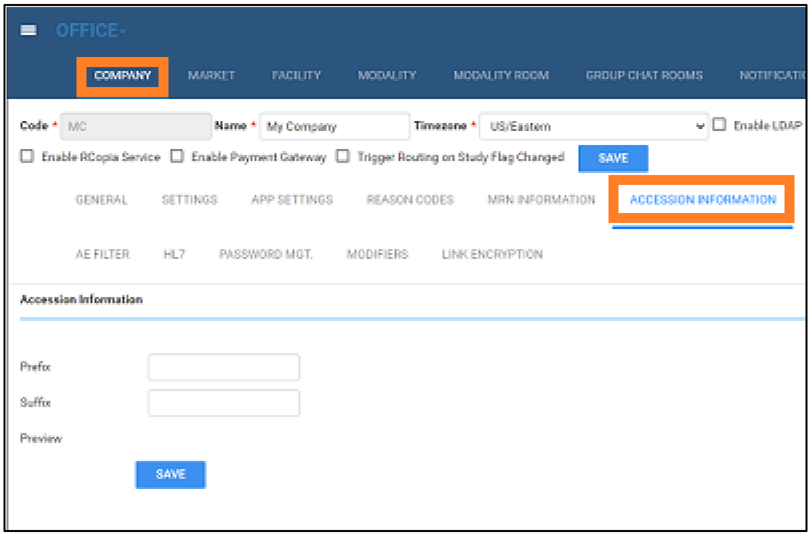
3. Select SAVE.

Accession information

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

Procedure

1. Go to SETUP > OFFICE > Office > COMPANY > ACCESSION INFORMATION.



2. 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.

3. Select SAVE.

AE filter

This sub-tab is currently unused.

HL7

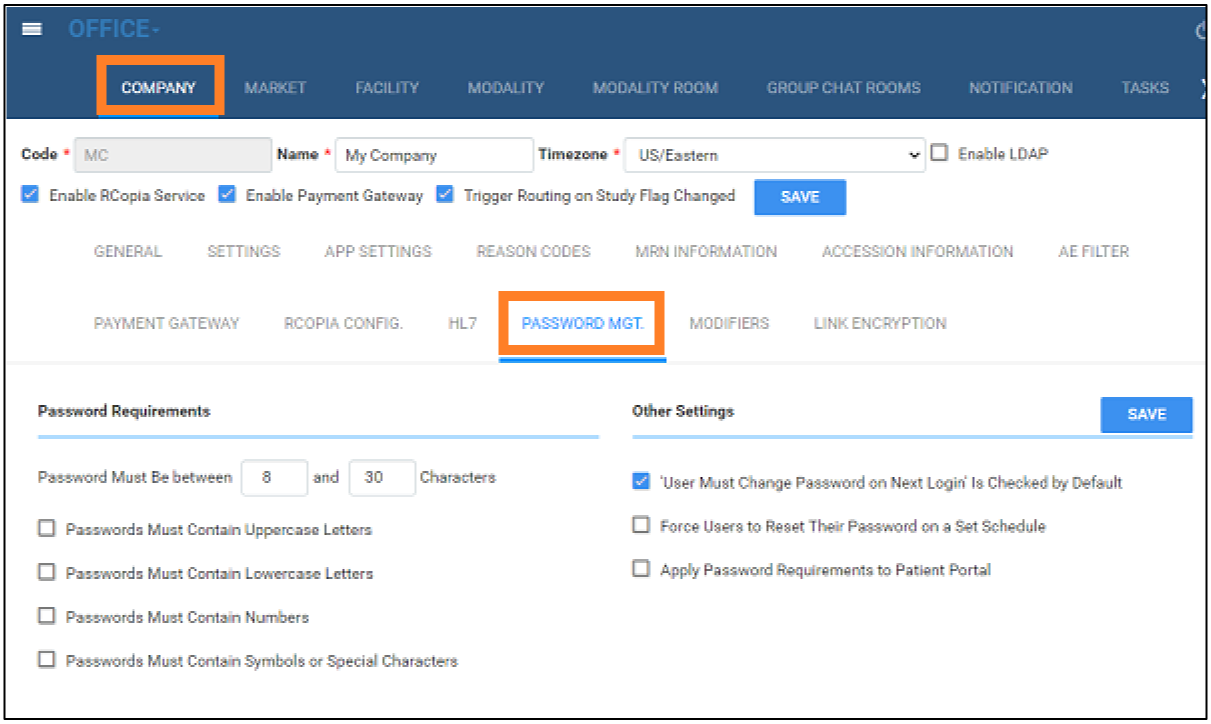
This sub-tab is currently unused.

Password management

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

Procedure

1. Go to SETUP > OFFICE > Office > COMPANY > PASSWORD MGT.



2. Enter the following settings.

Setting	Description	
Password Must Be between...	Type a minimum and maximum number of characters that passwords can contain.	
Passwords Must Contain ...	Uppercase Letters	Symmetry PACS validates passwords based on these selections.
	Lowercase Letters	
	Numbers	
	Symbols or Special Characters	
'User Must Change Password Next Login' Is Checked by Default	Select or clear to assign the default state of the setting.	
Force Users to Reset Their Password on a Set Schedule	Select to require password resets of a specified interval.	
Apply Password Requirements to Patient Portal	Select to use the same password requirements for Patient Portal accounts.	

3. Select SAVE.

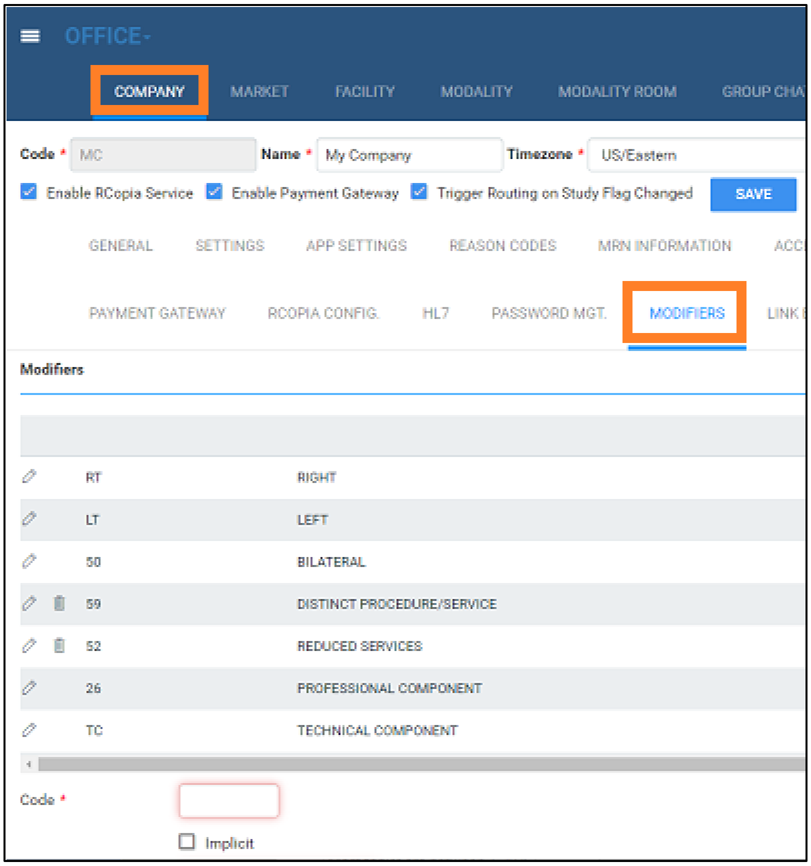
Modifiers

Modifiers are alphanumeric codes that you can append to a CPT or HCPCS code (such as when adding charges to claims and invoices) to provide information to payers that helps them process claims. Professional and facility claims can include up to four modifiers per CPT/HCPCS code. Placement of the modifiers is critical for correct reimbursement.

To use modifiers in other parts of the program, preconfigure them as follows.

Procedure

1. Go to SETUP > OFFICE > Office > COMPANY > MODIFIERS.



2. 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.

3. Select SAVE.

Set up the office: Other assets

In addition to company settings, there are many other infrastructure and data assets that you can configure.

This section contains the following topics (not all topics may be available depending on version and region).

Add a facility
Add modalities
Add modality rooms
Add a notification
Add tasks
Create a study flag
Set monthly goals
Configure macro notes
Configure portal links

Add a facility

You must add at least one facility to your institution.

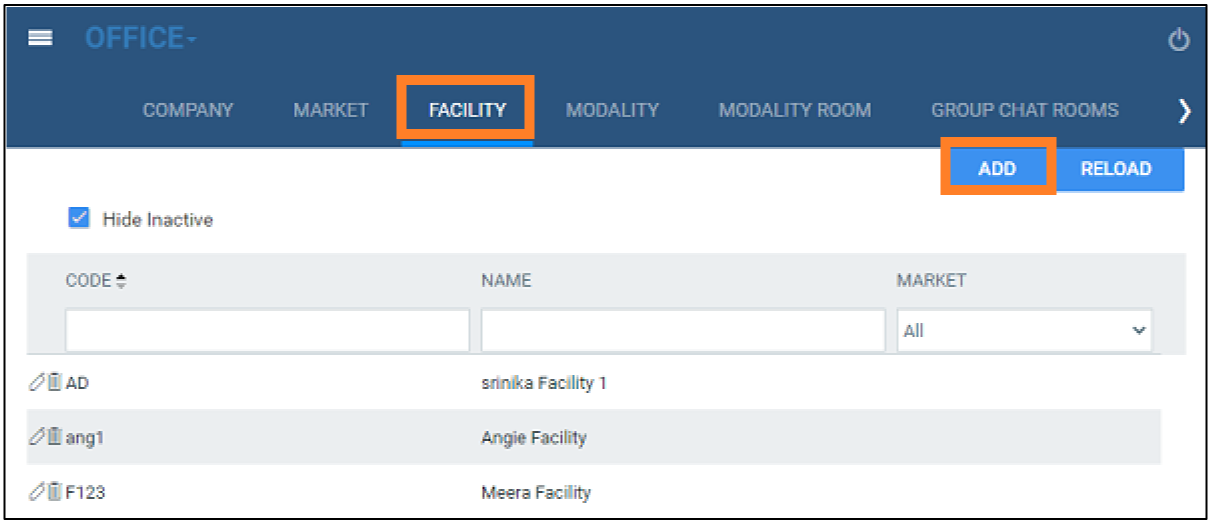
Common tasks after adding a facility

After adding your facilities by using the procedure below, see the following topics on other tasks you may need to complete.

- Configure study statuses
- Configure application entities
- Configure a file store
- Configure routing rules
- Configure AE scripts
- Understanding receiver rules
- Configure a receiver rule
- Configure study flow
- Add modalities
- Add modality rooms
- Add a report template
- Create a user

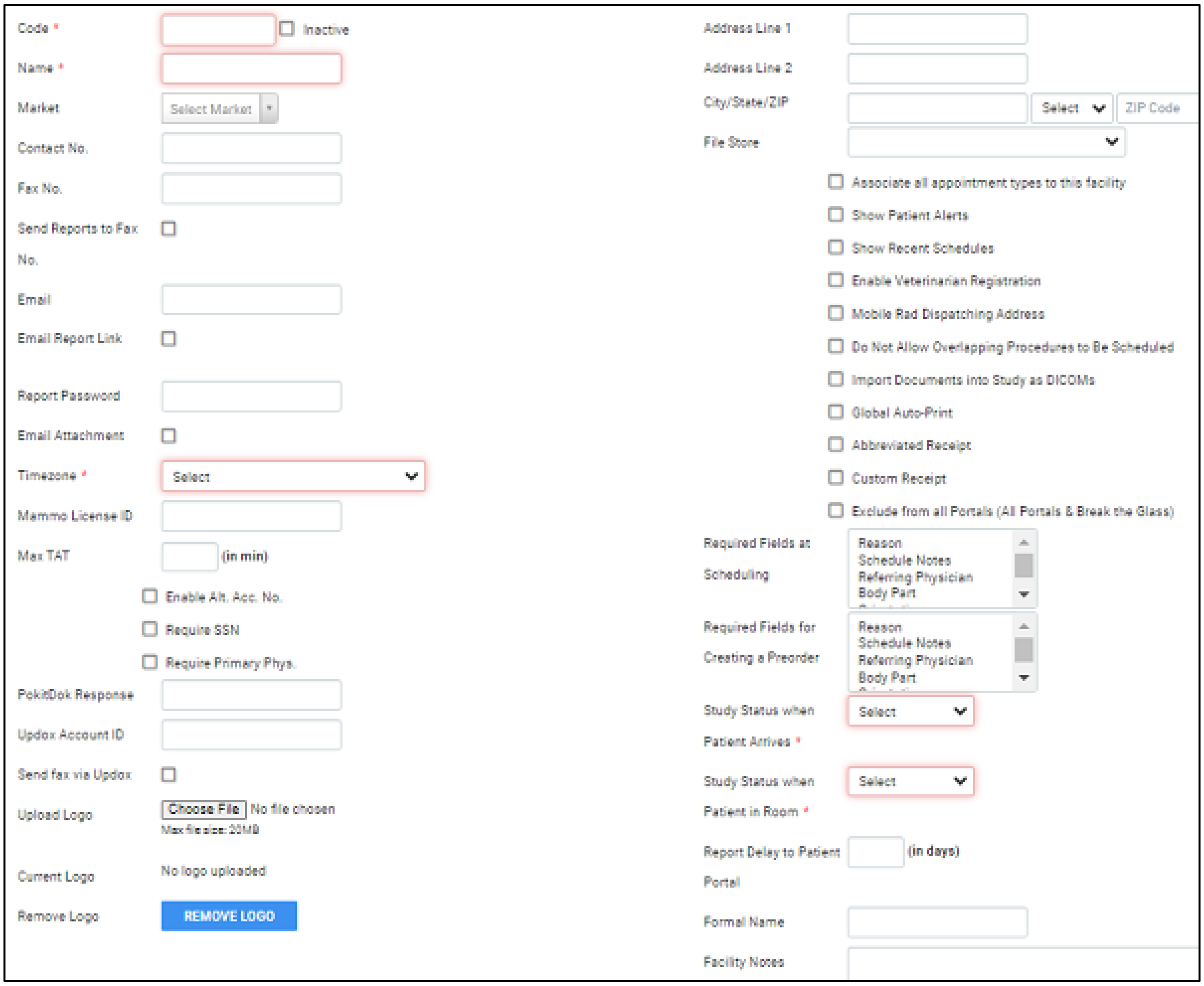
Procedure

1. Go to SETUP > OFFICE > Office > FACILITY.



2. Select ADD, and then enter the following settings for the facility.

Caution: For recommended security, please turn off Chrome autofill. A password and/or patient information is configured or used on this page.



All settings not shown. Settings vary by product and region.

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.

Setting	Description
Max TAT	Type the maximum allowed turnaround time, in minutes, before a breach of contract occurs.
Enable Alt. Acc. No.	Select to use alternate account numbers (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.
File Store	Select the default file store to use at the facility. See also Configure a file store.
Associate all appointment types to this facility	Select to associate all appointment types to this facility. Saves time because you don't have to add the facility to each appointment type configuration.
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	[Exa PACS/RIS only]
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 a printer that is configured on the Exa platform 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 require 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.
Facility Notes	Type additional notes for the facility if needed.
MRN Information: Inherit	Select to copy the MRN from your company settings or EMR of origin. Clear to define a dedicated format for the facility.
Other MRN settings	See MRN information.

3. Select SAVE & CLOSE.

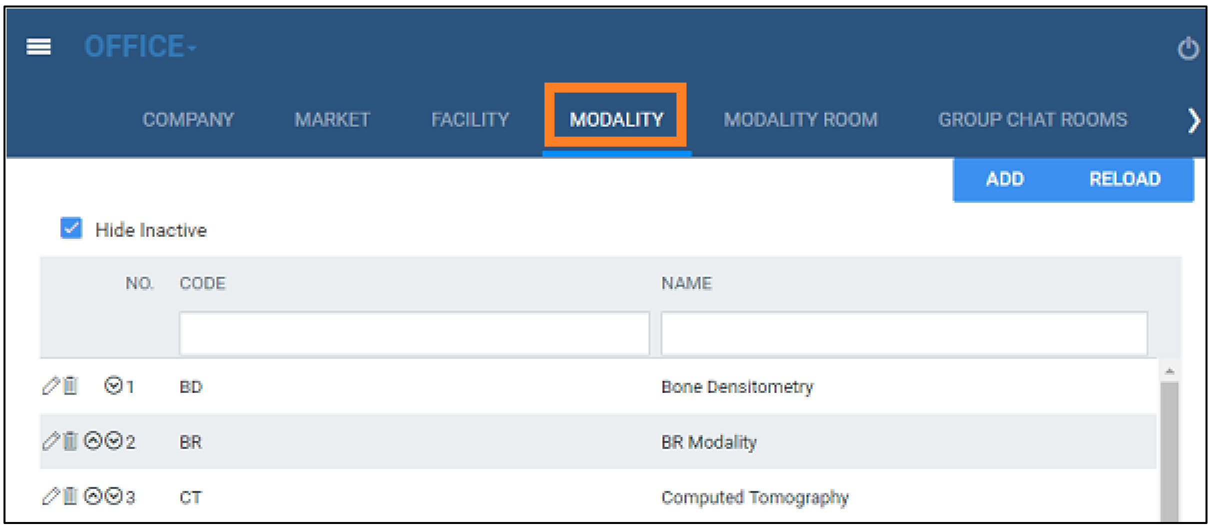
Add modalities

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.

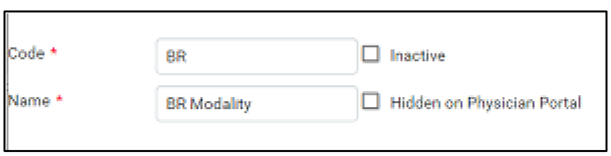
Caution: Do not add non-DICOM modalities, as this could result in problems sending studies to external PACS.

Procedure

1. Go to SETUP > OFFICE > Office > MODALITY.



2. Select ADD.



3. 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.

4. Select SAVE.

5. 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, and must be configured for use in scheduling exams. Add a modality room for each modality at your facility. Each modality room your configure here appears as a column on the schedule book.

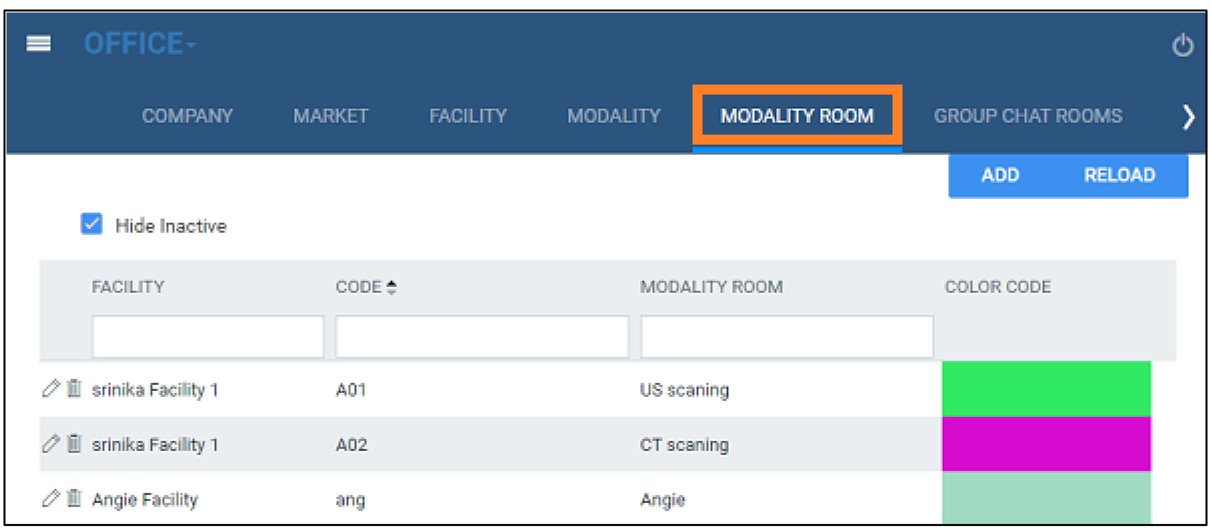
Prerequisite: Add modalities, Add a facility, and DICOM modality worklist (see Configure application entities).

Avoid common mistakes

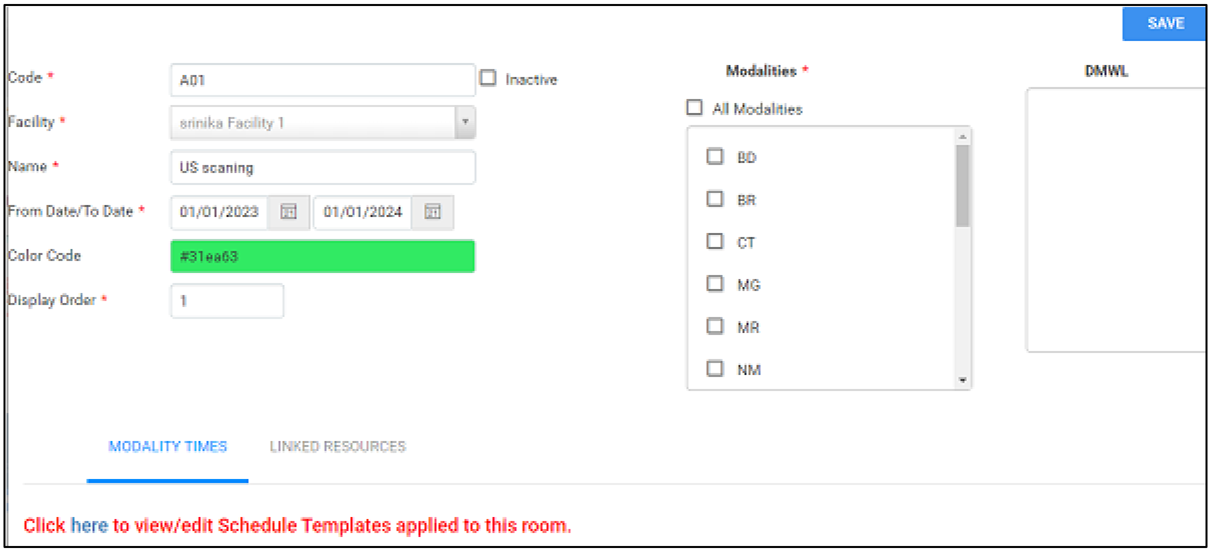
- Give your modality rooms intuitive names that are easy to find
- Set the From date to a date in the past to view past scheduled appointments
- Set the To date to a date far in the future (such as 1/1/2099) unless you plan to permanently close the room on a certain date.

Procedure

1. Go to SETUP > OFFICE > Office > MODALITY ROOM.



2. Select ADD.



3. Enter the following settings.

Setting	Description
Code	Type your unique 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 a date range in which you can view studies on the schedule book. Note: Set the To Date according to how long you plan to keep using the room.
Color Code	Click inside the box, and then select a color from the picker to assign to the modality room. The color appears in a bar below the name of the modality room in the schedule book.
Display Order	Type a number to determine in which column the modality room appears 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. All appointment types with the modalities you select become available to schedule in the room (unless excluded by schedule rules).
DMWL	Select the AEs in the room to which to serve the worklist. Only the selected AEs will receive orders for that room.

4. On the MODALITYTIMES sub-tab, select the here link, and then add a schedule template to the room.
5. Optional: 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.
6. Select SAVE.

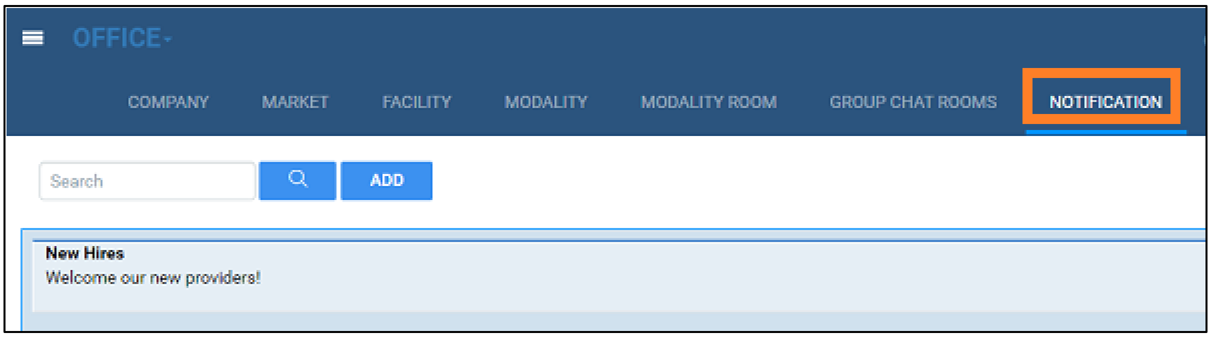
Add a notification

You can preconfigure notifications (for example, a welcome message) 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.

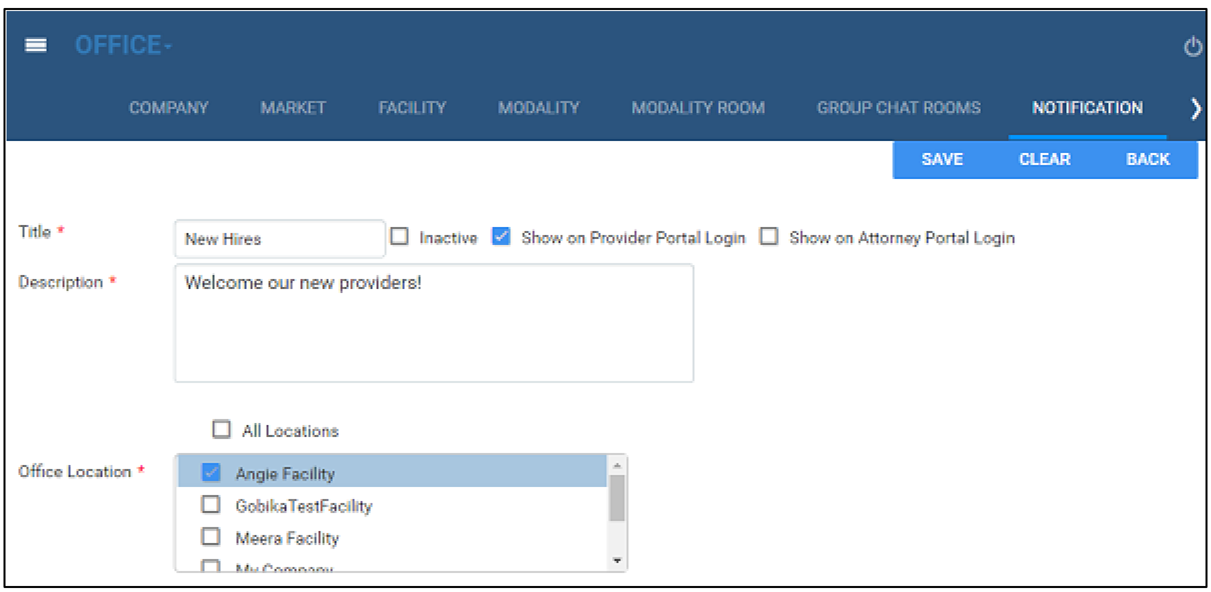
Prerequisite: Add at least one facility.

Procedure

1. Go to SETUP > OFFICE > Office > NOTIFICATION.



2. Select ADD.



3. 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.

Setting	Description
Office Location	Select one or more facilities to which to send the notification.

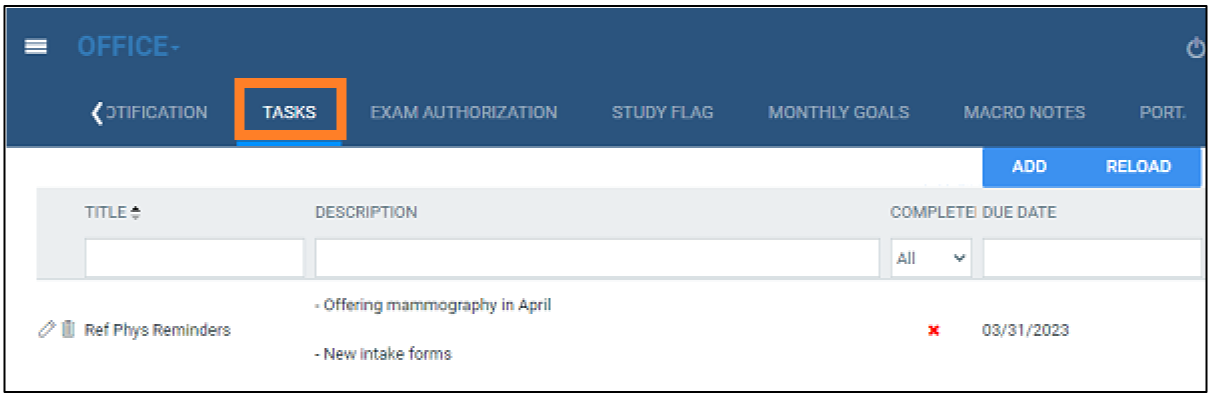
4. Select SAVE.

Add tasks

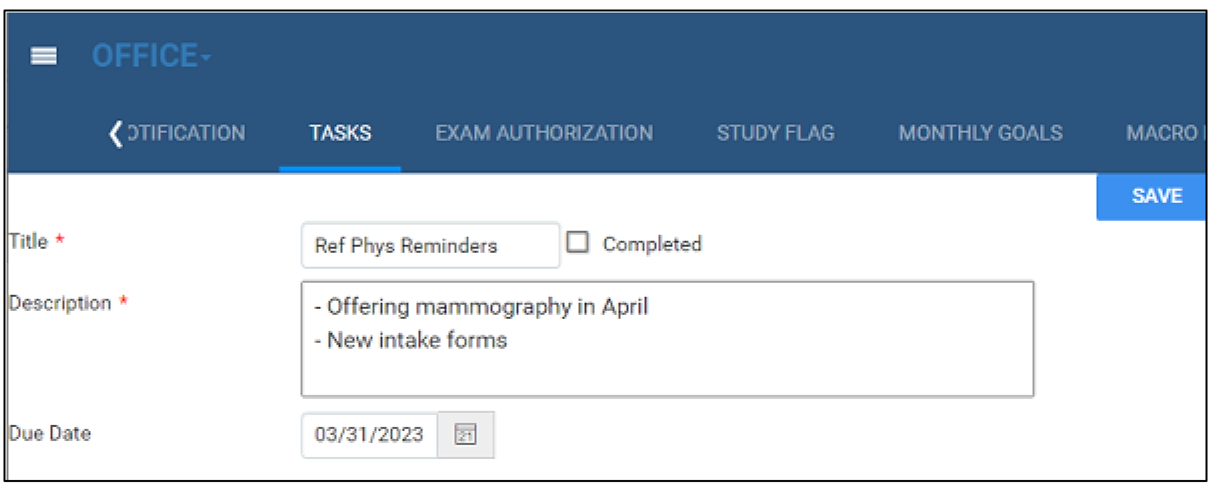
Administrators can add tasks for marketing representatives, such as “Tell referring physician offices that we will start offering 3D mammography in January.”

Procedure

1. Go to SETUP > OFFICE > Office > TASKS.



2. Select ADD.



3. Enter the following settings.

Setting	Description
Title	Type a title for the task.
Description	Type a description of the task.
Due Date	Select a due date for the task.

Setting	Description
Completed	Select when the task is completed.

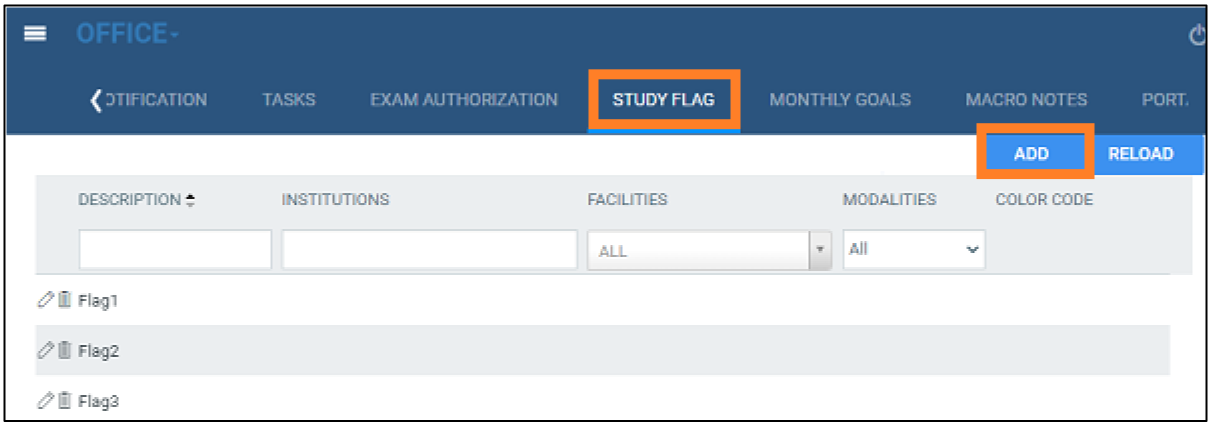
4. Select SAVE.

Create a study flag

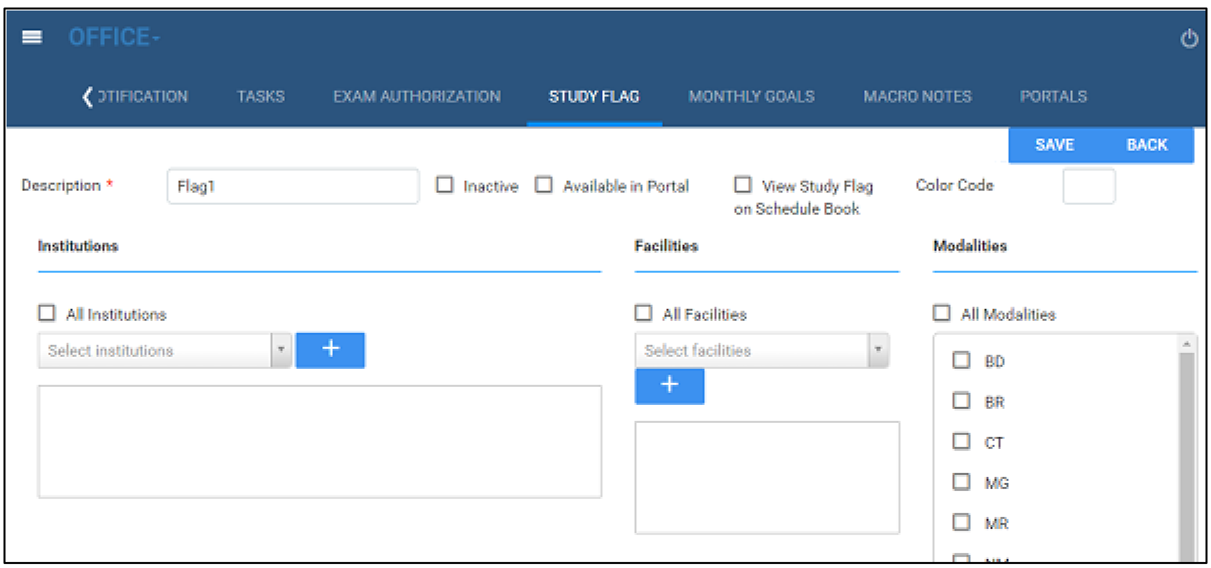
You can create a study flag that users can apply to studies and orders on the worklist. Sorting the worklist by flags is one way for users to easily find groups of studies or orders to work on. You can also use them to trigger routing rules. When you create a study flag, you can restrict its availability by institution, facility, modality, and other parameters.

Procedure

1. Go to SETUP > OFFICE > Office > STUDY FLAG.



2. Select ADD.



3. In the Description box, type a name for the flag.

4. 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.

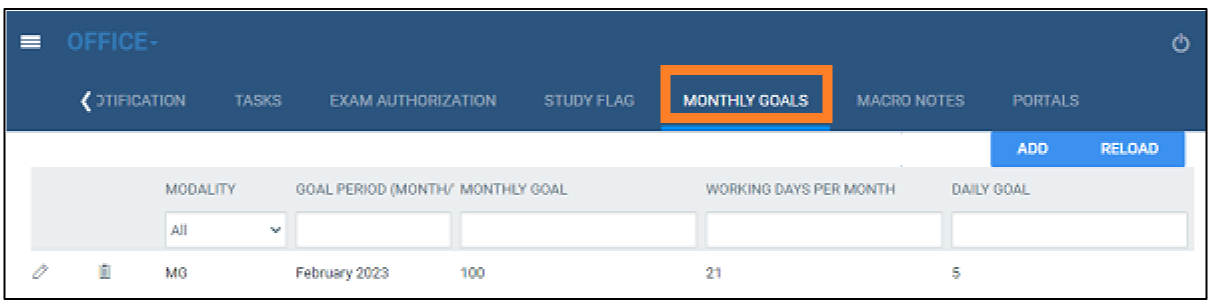
5. Select SAVE.

Set monthly goals

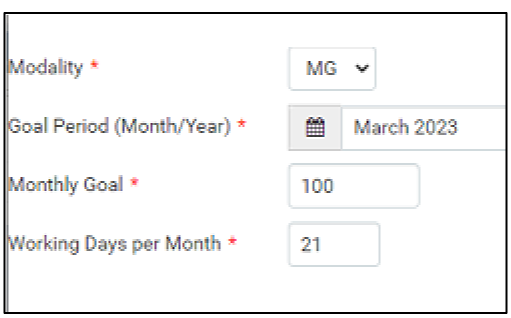
You can set monthly goals for the number of studies to perform for each of your modalities. This information is used in the Monthly/Daily Study Goals operations report.

Procedure

1. Go to SETUP > OFFICE > Office > STUDY FLAG.



2. Select ADD.



3. Enter the following settings.

Setting	Description
Modality	Select the modality for which to set a goal.
Goal Period	Select the month for the goal.

Setting	Description
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.

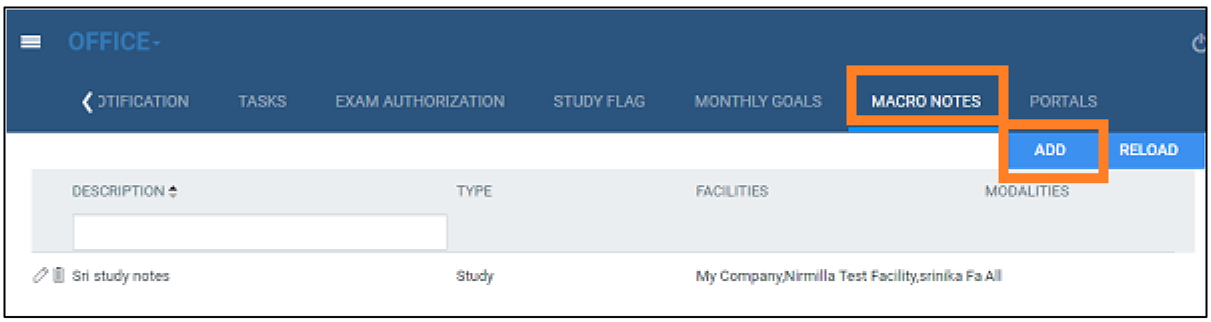
4. Select SAVE.

Configure macro notes

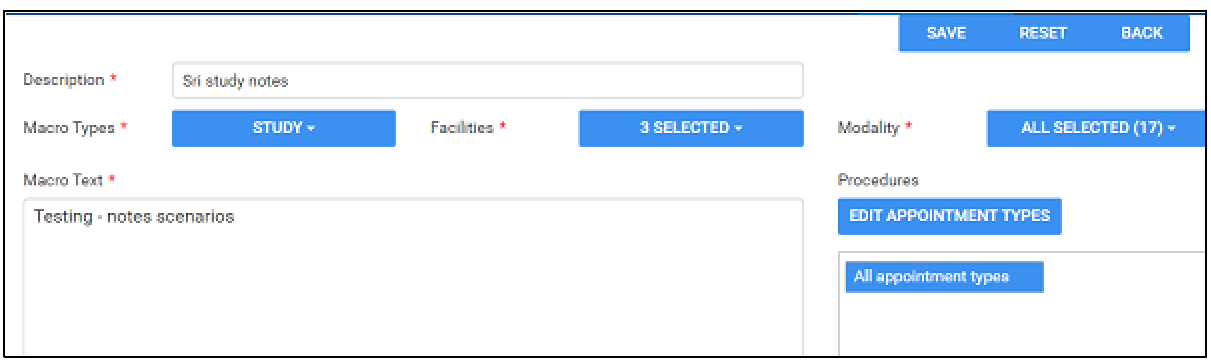
Macro notes are preconfigured blocks of text and metadata that you can add as notes to items in various parts of the program such as studies, schedules, and claims. Configuring macro notes ahead of time saves you from having to re-enter the same notes on multiple occasions.

Procedure

1. Go to SETUP > OFFICE > Office > MACRO NOTES.



2. Select ADD.



3. 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.

Setting	Description
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.

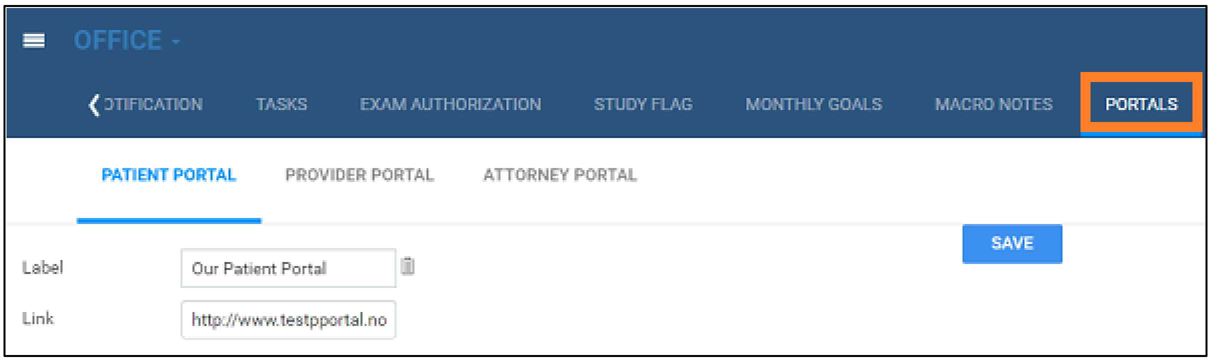
4. Select SAVE.

Configure portal links

You can add up to two custom links (URLs) to the patient, provider (physician), or attorney portal. For example, you could add a link to the patient portal that sends your patients to your company’s payment website.

Procedure

1. Go to SETUP > OFFICE > Office > PORTALS.



2. Select a portal sub-tab (PATIENT, PROVIDER, or ATTORNEY), 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`

3. Select SAVE.

Configure providers and resources

You can set up individual healthcare providers, their groups and facilities, and provider pay schedules for use in other parts of the program.

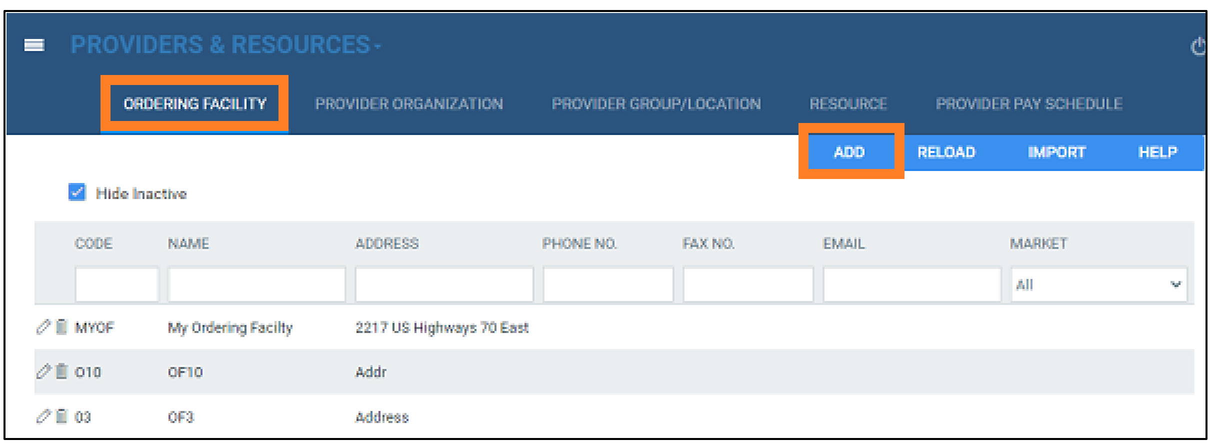
This section contains the following topics (not all topics may be available depending on version and region).

Add a location or contact to an ordering facility

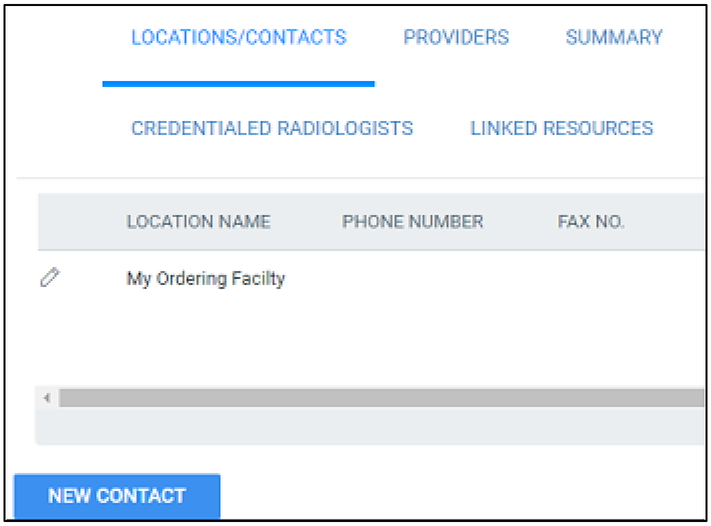
Ordering facilities can have multiple locations. For example, skilled nursing facilities (SNFs) can have different halls, each with different nurse stations or fax lines. To make locations and contacts easily selectable in other parts of the program, you can add them to your ordering facilities as follows.

Procedure

1. Go to SETUP > OFFICE > Providers & Resources > ORDERING FACILITY.



2. On the ORDERING FACILITY tab, open an ordering facility to edit, and then select the LOCATIONS/CONTACTS sub-tab.



3. Select NEW CONTACT, and then enter the following settings.

Caution: A password is configured or used on this page. For recommended security, turn off Chrome autofill.

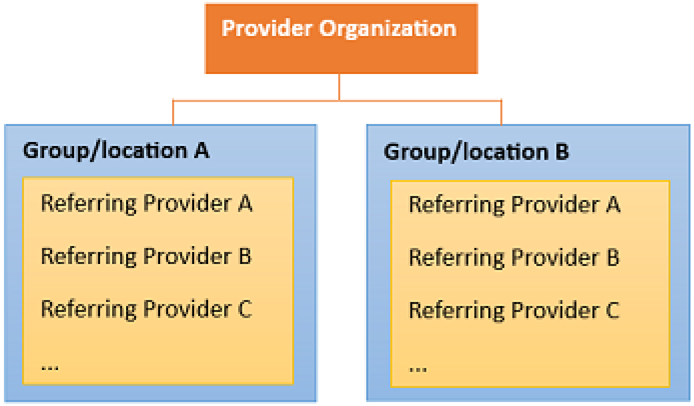
Setting	Description
Location Name	Type the name of the location.
Phone/Fax/Email	Type the contact information for the facility.
Send Fax/Email	Select the checkboxes to indicate how to receive approved reports.
Report Password	Type the password that the ordering facility must use to view reports generated from exams that they ordered.
Ordering Facility Type	Select the type of ordering facility for the location.
POS Type	Select the place of service code for the location.
Primary Contact	Select if this location is the primary contact for the ordering facility.
Billing Type	Available in selected regions. Select the billing type of the location. What is a billing type?

5. Select SAVE CONTACT.

6. Select SAVE & CLOSE.

About provider organizations, and provider groups and locations

In Exa PACS/RIS you can organize your healthcare institutions hierarchically by parent Companies and child Facilities. In a similar manner, you can organize your referring providers by parent provider organizations and child Groups/Locations (which are typically "brick-and-mortar" offices and clinics). You can then associate individual referring providers to those groups and locations (see Add a provider group or location).



Notes:

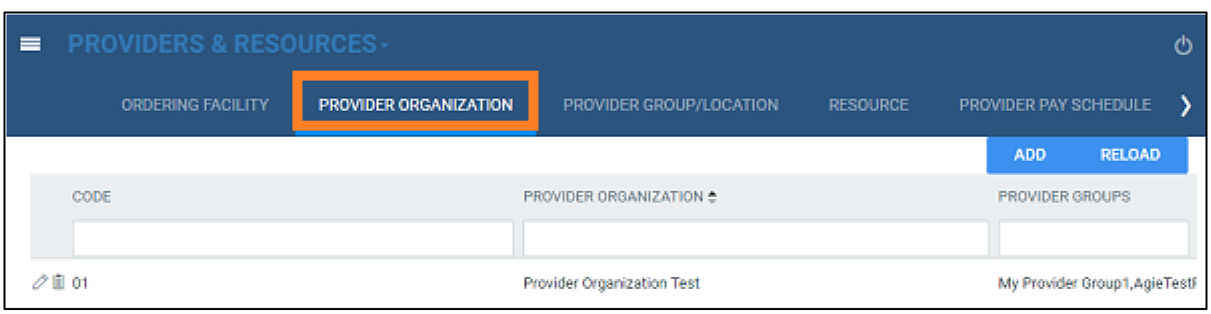
- Configuring provider groups and locations in advance is recommended because it makes it easier to enter settings for resources, providers, and other assets.
- Configuring provider groups and locations is required for setting up the physician portal.

Add a provider organization

A *provider organization* is an optional parent entity for *provider groups and locations*, which are typically "brick-and-mortar" offices and clinics for referring providers (see About provider organizations, and provider groups and locations). To add a provider organization:

Procedure

1. Go to SETUP > OFFICE > Providers & Resources > PROVIDER ORGANIZATION.



2. Select Add, and then enter the following settings.

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

3. Select SAVE & CLOSE.

See also:

Add a provider group or location

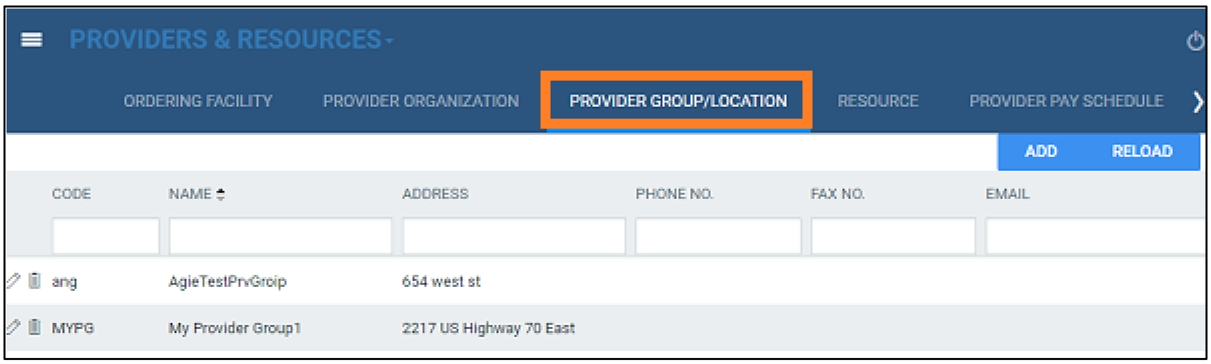
Add a provider group or location

Provider groups and locations are typically "brick-and-mortar" offices and clinics to which you can associate individual referring providers. If your institution works with a provider group or location, add it to the system as follows.

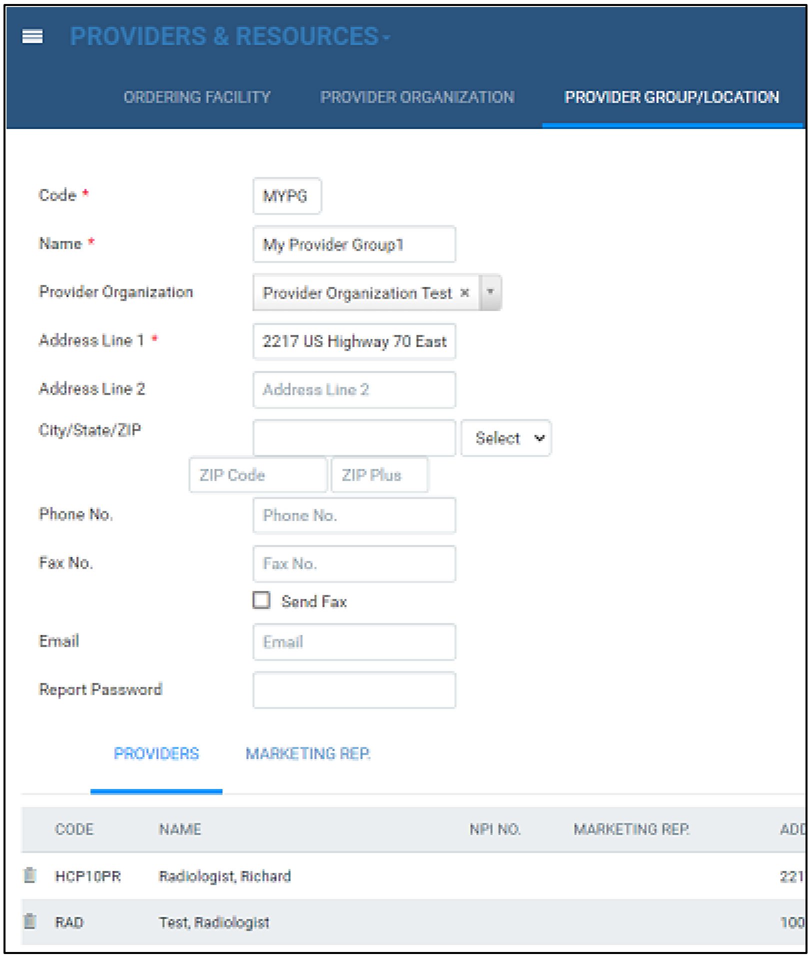
Caution: A password is configured or used on this page. For recommended security, turn off Chrome autofill.

Procedure

1. Go to SETUP > OFFICE > Providers & Resources > PROVIDER GROUP/LOCATION.



2. Select Add.



3. Enter the following settings.

Setting	Description
Code	Type your internal code for the group.
Name	Type the name of the group.
Provider Organization	Select the provider organization to which the provider group or location belongs.
[Address]	Type and select the address and country or region of the group.
Phone/Fax No.	Type the primary contact information for the group.
Email	Type the email address of the primary contact at the group.
Report Password	Type the password that the provider group must use to view reports generated from exams that they ordered.

4. Select SAVE.
5. Use the PROVIDERS sub-tab to view or edit the list of configured providers.
6. Use the MARKETING REP sub-tab to add a marketing rep to the provider group.

See also:

About provider organizations, and provider groups and locations

Add a resource

A *resource* is a "container" to which you link an attorney, nurse, provider, laboratory, radiologist, technologist, or referring provider. You can add individual resources and add them to one or more provider groups.

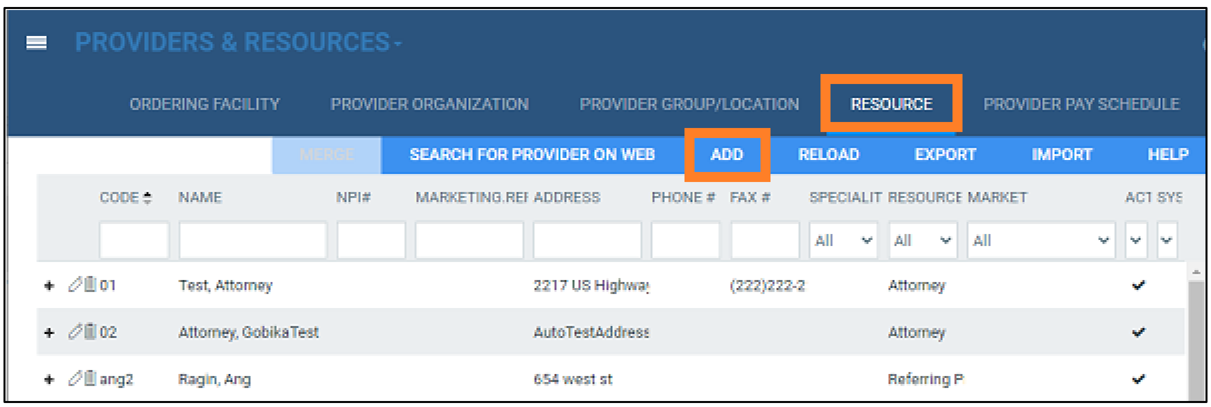
Caution: Turn off Chrome autofill feature before entering sensitive or security related information such as dates of birth and passwords.

Why add a "resource" at all?

A user (such as an individual technologist) cannot be directly assigned to a study. Instead, you assign the resource (such as a resource of type Technologist) to a study, and then link a user to the resource. See "LOGIN DETAILS" in Configure detailed resource settings. Resources also serve as a grouping mechanism to make users easier to find in various parts of the program.

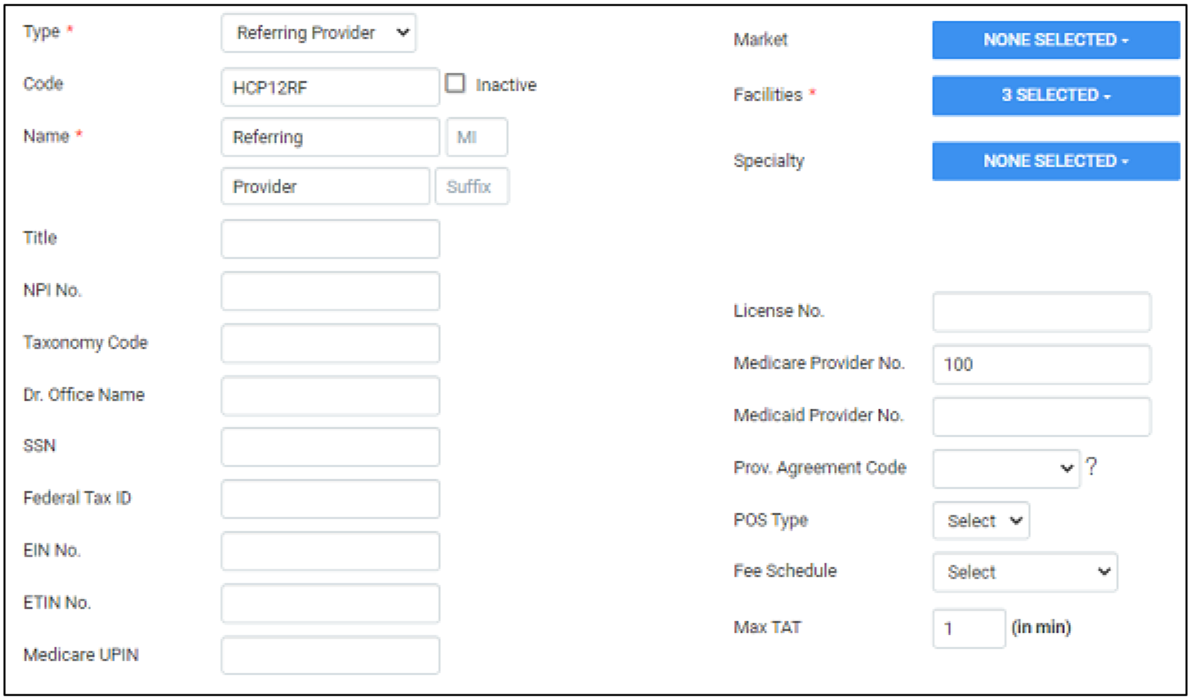
Procedure

1. Go to SETUP > OFFICE > Providers & Resources > RESOURCE.



2. Select Add, and then enter the settings in the figure below.

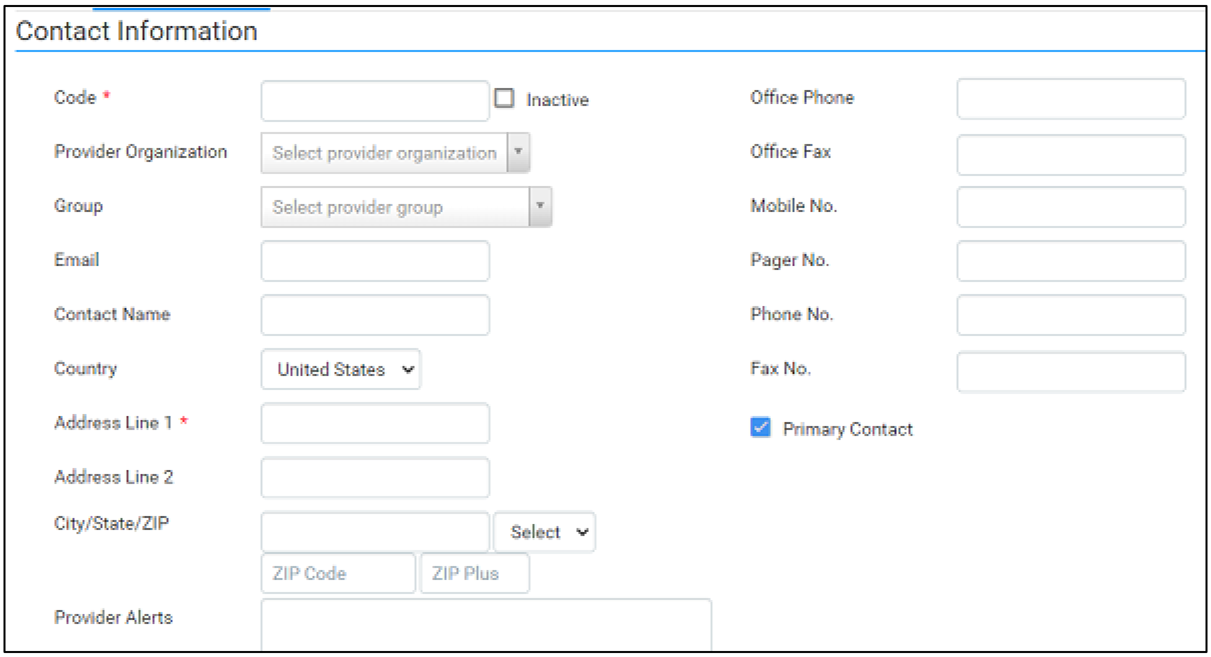
Note: Actual settings differ depending on your selection in the Type dropdown list.



Setting	Description
Type	Select the provider type.
Code	Type your internal code for the provider.
Name	Type the name of the provider.
Modality	Select the technologist’s allowed modalities.
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 dropdown list that are associated with the selected market become selected.
Facilities	Select all facilities with which the provider is associated. CAUTION: Confusion can arise if you select Facility "A" here, and then later link a user to this resource who does not have rights to view studies from Facility "A." Keep track of which resources and users have access to which facilities and other assets.
Specialty	Select the specialties of the provider.
License No.	Type the state medical license number of the provider.

Setting	Description
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. Select the place of service type for the referring provider's location.
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.

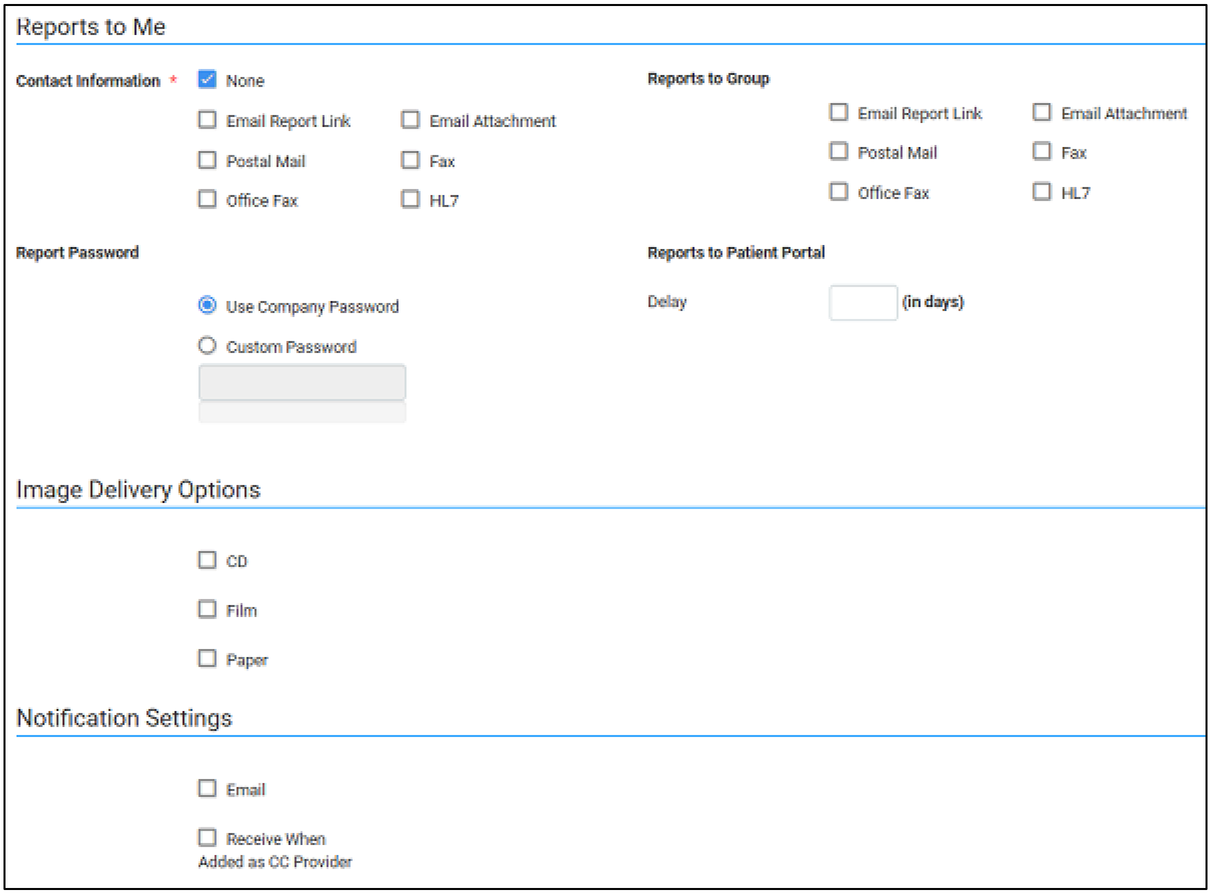
3. Under Contact Information, enter the following settings.



Setting	Description
Code	Type your internal code for the provider.
Provider Organization	Select the provider organization of the provider.
Group	Select the provider group to which the provider belongs. If the provider uses Physician Portal, you must select the portal user's group.
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.
[Country and 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.

Setting	Description
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.

4. Under Reports to Me, enter the following settings.



Group	Setting	Description
Reports to Me	Contact Information Email Report Link Email Attachment Postal Mail Fax Office Fax HL7	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 Report Link Email Attachment Postal Mail Fax Office Fax HL7	Select to send reports to all members of the provider location/contact's provider group, and select which methods to use.

Group	Setting	Description
	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. CAUTION: If you don't add a password, the default password (123456) is used. Because this is easy to guess, please create a unique password as soon as possible.
	Reports to Patient Portal Delay	Type the number of days to wait before posting reports on the patient portal.
Image Delivery Options	CD Film Paper	Select which media to use to deliver images.
Notification Settings	Email/Fax	Select to receive notifications by email and/or fax.
	Receive When Added as CC Provider	Select to have the provider receive notifications by email if they are added as a CC (carbon copy) provider.

5. Select SAVE.

   Result: The resource is saved, and sub-tabs appear for detailed settings.

6. Continue to Configure detailed resource settings.

See also:

Configure a technologist
Deliver reports
Configure a notification template

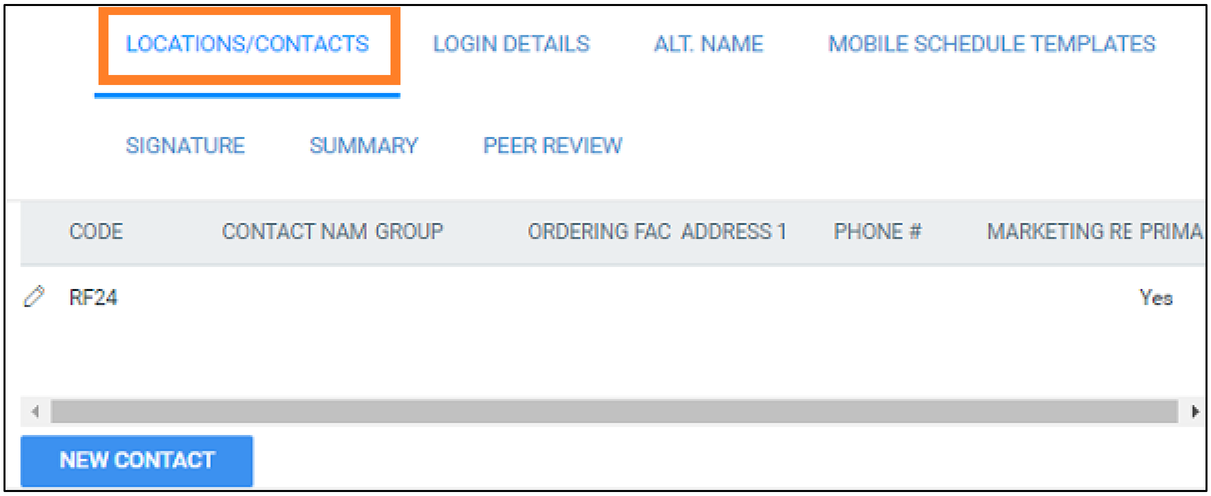
Configure detailed resource settings

If you open a resource for editing, sub-tabs appear for detailed settings. Select a sub-tab, enter settings as described below, and then select SAVE & CLOSE.

Prerequisite: Add a resource.

LOCATIONS/CONTACTS

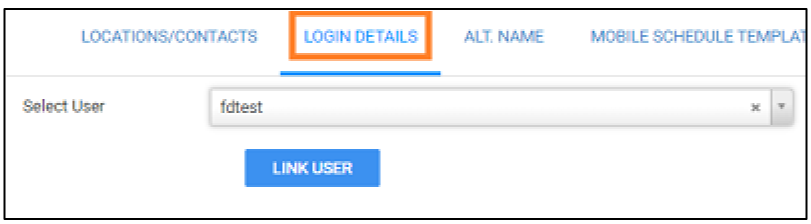
If the resource is available at multiple locations (such as physical addresses) or points of contact (such as different offices with different phone and fax numbers), you can create a new location/contact by selecting NEW CONTACT.



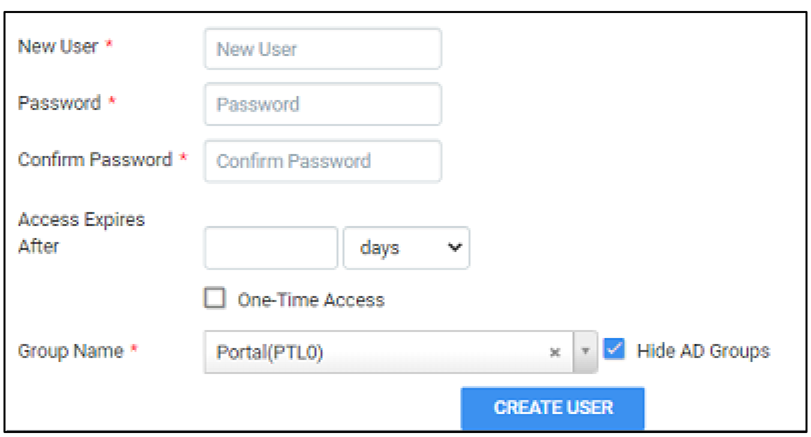
LOGIN DETAILS

In this tab, you can link an individual user to the resource.

1. Select the user and then select LINK USER.



2. Optional. If the correct user has not yet been configured, you can add them "on the fly" by entering the following settings.



ALT. NAME

If the resource goes by different names, add them here.

ALLOWED APPOINTMENTS

For technologists. You can select EDIT, and then search for appointments that the technologist is allowed to perform. Leave blank to allow all appointments.

SCHEDULE RULES

For technologists. You can view which schedule rules are associated with the technologist.

SIGNATURE

Attach a JPG image to use as the resource's electronic signature in other parts of the program and portals.

SUMMARY

Generate basic reports about which patients, studies, and encounters the resource interacted with over a specified range of time.

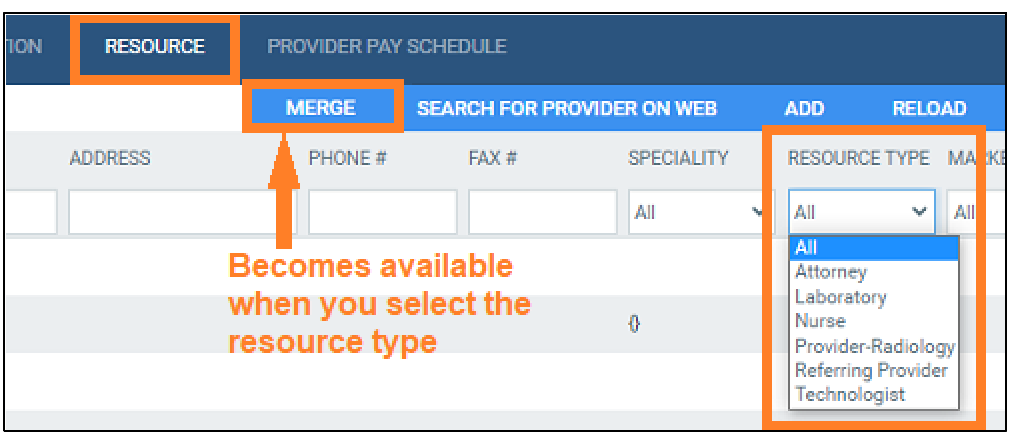
PEER REVIEW

Use to specify which studies a radiologist resource can peer review. See Configure peer reviewing provider filters.

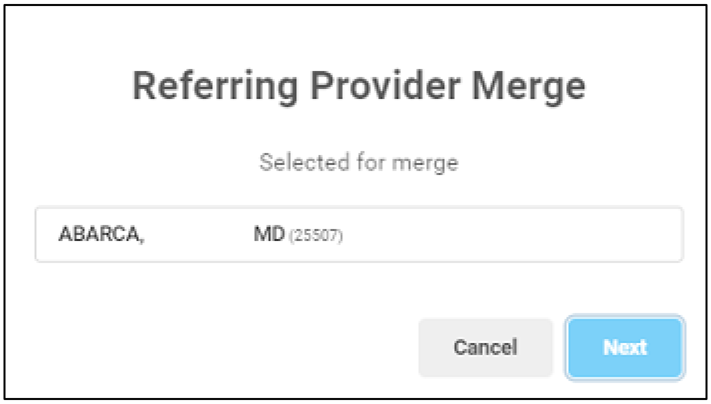
Merge resources

It is possible to accidentally configure the same resource more than once, for example by configuring separate instances of a resource for multiple locations rather than configuring the resource once and adding multiple locations. If you find such duplicate resources it is best to merge them.

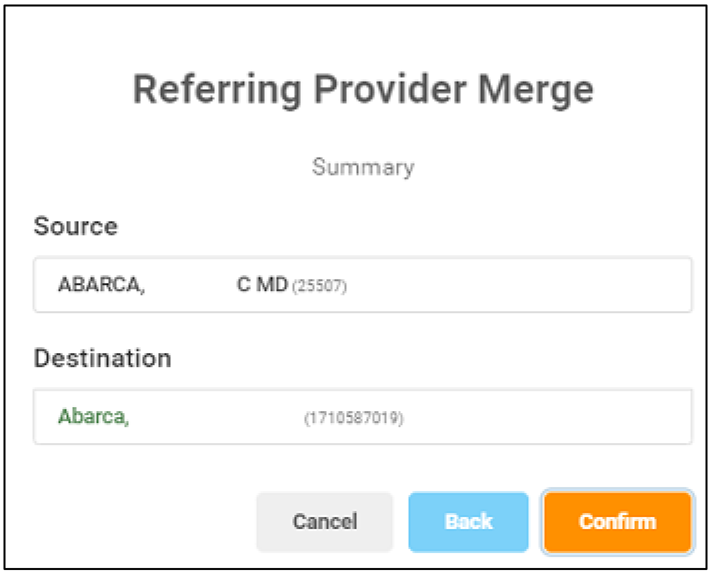
1. Go to SETUP > OFFICE > Providers & Resources > RESOURCE.
2. In the RESOURCE TYPE column, select the type containing the duplicate resources.



3. In the list of resources, select one of the duplicated resources and select MERGE.
4. In the dialog, select Next, and then select a destination provider.



5. Select Confirm to complete the merge.

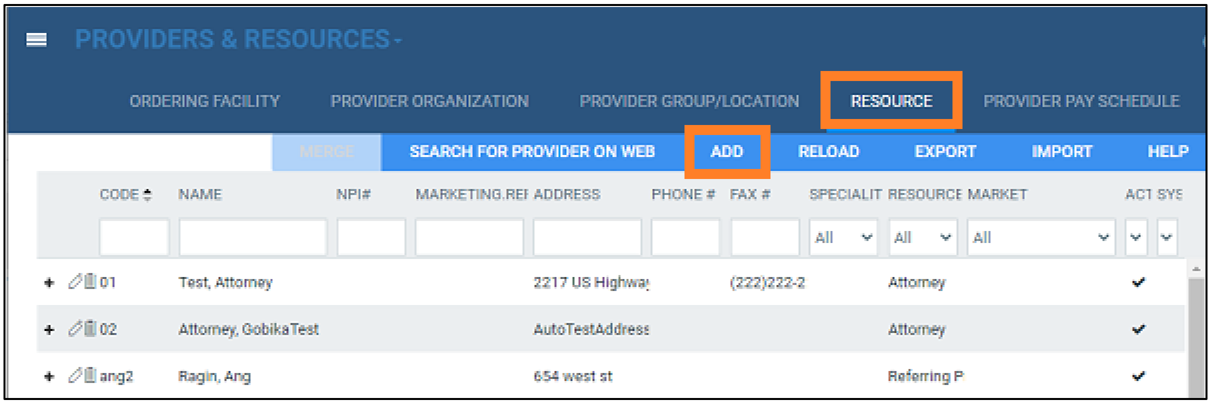


Convert or merge a system provider resource

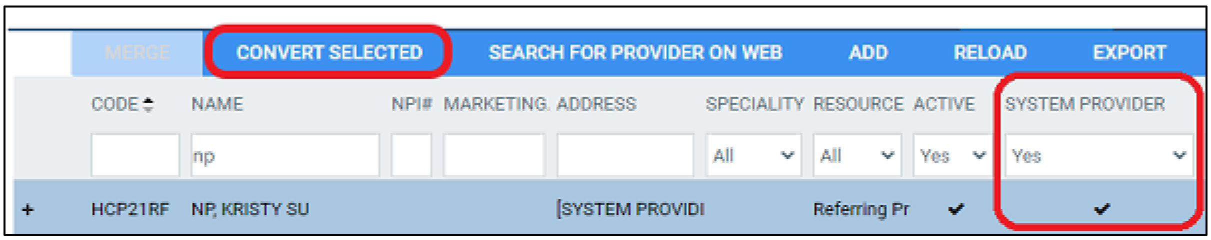
When Symmetry PACS receives a study with providers that it does not recognize, it automatically creates a *system provider* resource and associates the study with that system provider. System providers are not available in other parts of the program, but you can convert them to a usable provider or merge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

Procedure

1. Go to SETUP > OFFICE > Providers & Resources > RESOURCE.



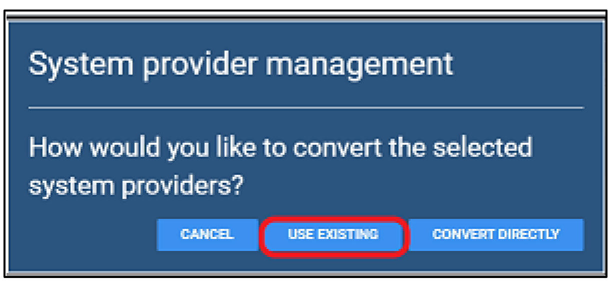
2. On the SYSTEM PROVIDER column, select Yes.



1. Select a system provider in the list, and then select CONVERT SELECTED.

2. To create a new provider, select CONVERT DIRECTLY.

3. To merge with an existing provider, select USE EXISTING, and then select a provider in the list.



4. Select SAVE.

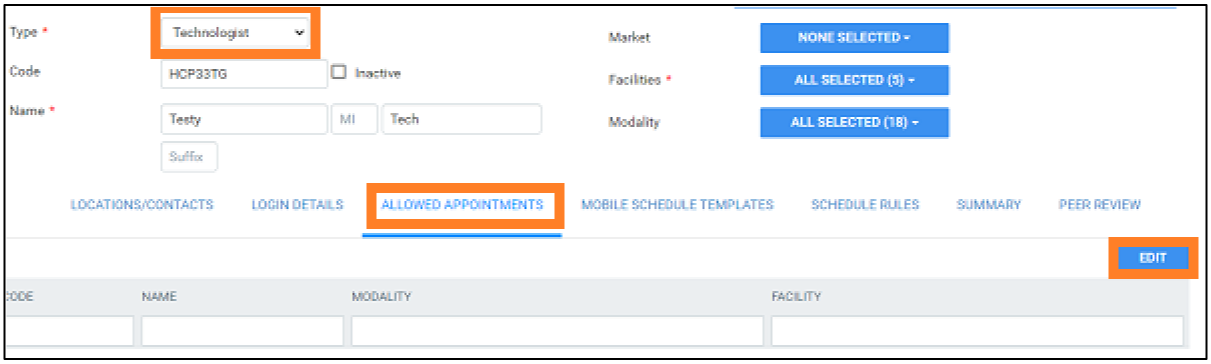
Configure a technologist

Technologists have access to special features in Symmetry PACS, and therefore require a slightly more detailed configuration that other types of users. To configure a technologist:

Add a technologist resource

1. Follow the steps in Add a resource to add a resource of type Technologist, and select SAVE (do *not* select SAVE & CLOSE).

2. On the ALLOWED APPOINTMENTS sub-tab, select EDIT.



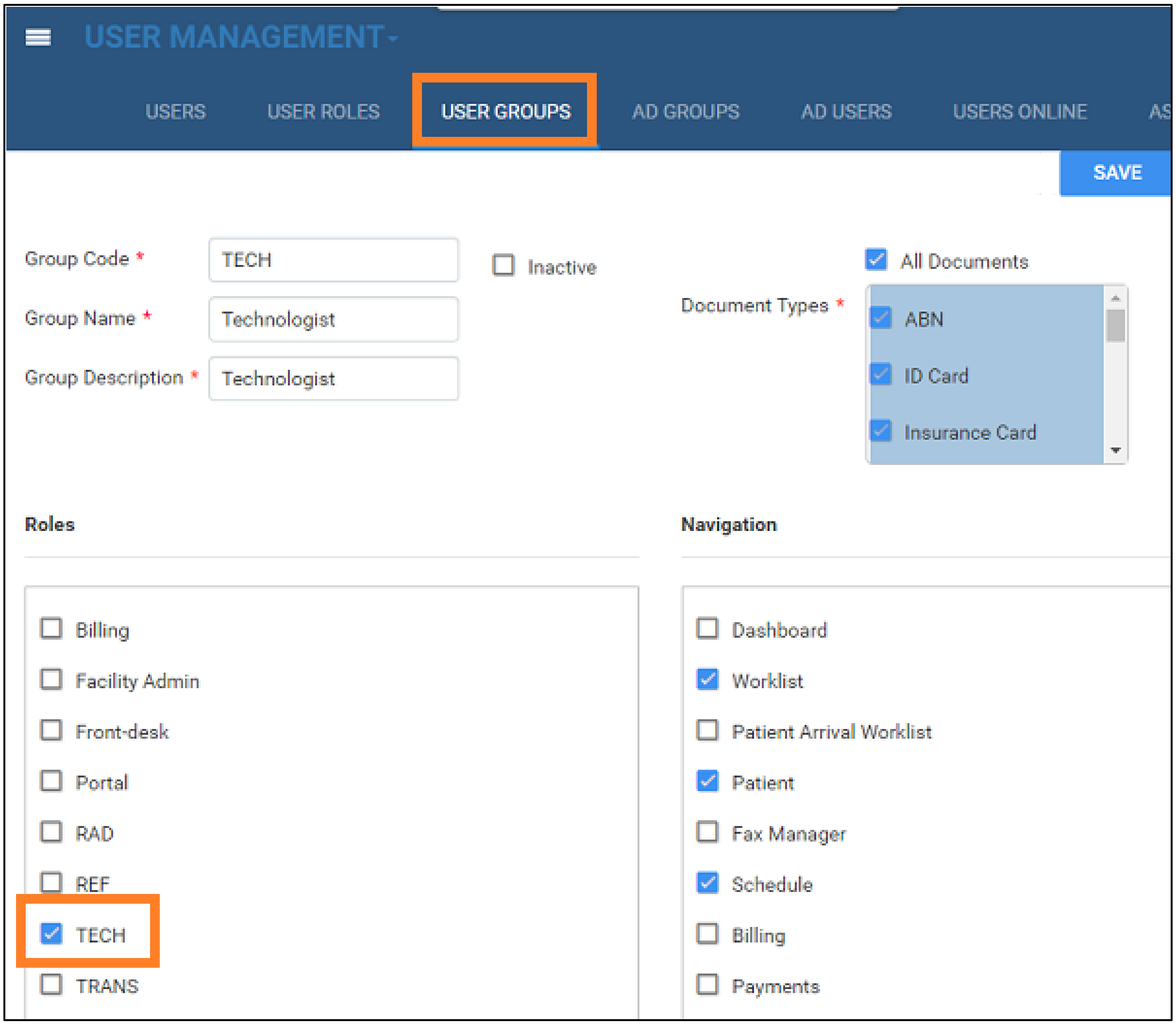
3. In the Edit Appointment Types dialog, select the checkboxes for all appointments that the technologist is allowed to perform, and then select SAVE.
4. Optional. On the SCHEDULE RULES sub-tab, select an edit button to modify a schedule rule.
5. Select SAVE & CLOSE.

Create a technologist user role

1. Go to SETUP > OFFICE > User Management > USER ROLES.
2. Select ADD, type a name and description of the role (such as "TECH"), and the select SAVE.
3. In the User Role Permission area, select the Technologist right, plus any other rights you want to grant all technologists.
4. Select SAVE & CLOSE.

Create a technologist user group

1. On the USER GROUPS tab, select ADD, and type a code, name, and description for the group.

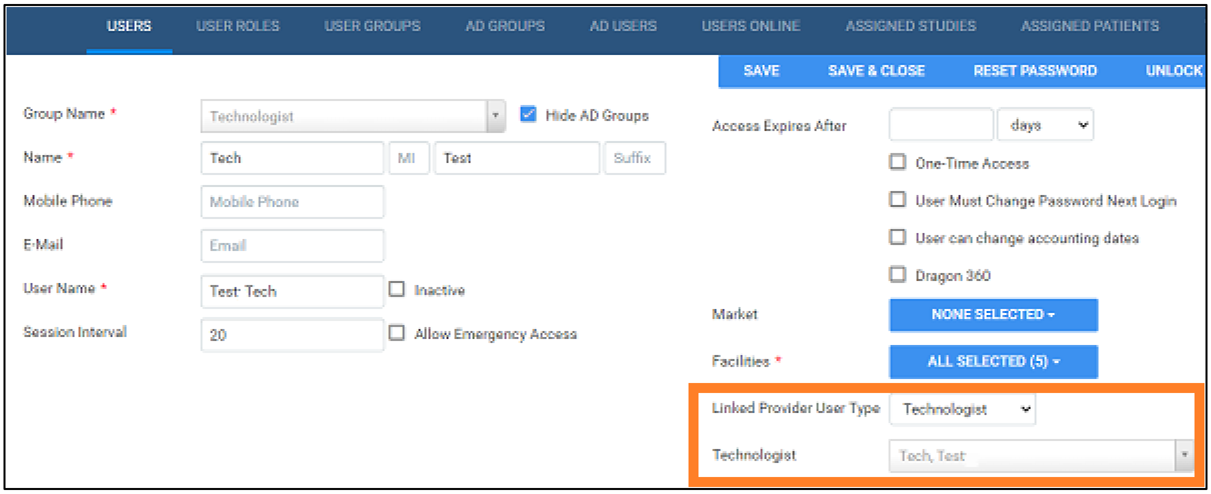


2. Type a In the Roles dropdown list, select the role you created earlier (such as TECH).
3. Enter other settings for the group (see [Create a user group)](), and then select SAVE.

Create a technologist user

Configure an individual technologist as a technologist user.

1. On the USERS tab, select ADD.
2. In the Linked Provider User Type dropdown list, select Technologist.



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

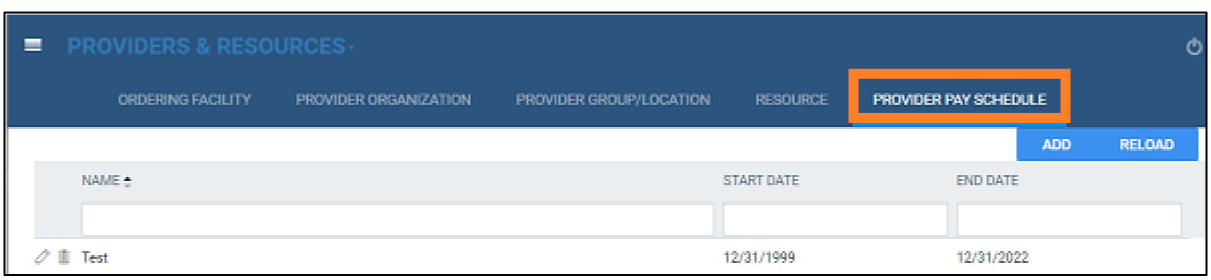
Configure a provider pay schedule

To help with billing, you can configure a pay schedule for each organization that provides radiology reading services. A pay schedule defines charges by procedure, modality, and radiologist. Configuring provider pay schedules also enables you to generate Fees by Radiologist and Modality reports.

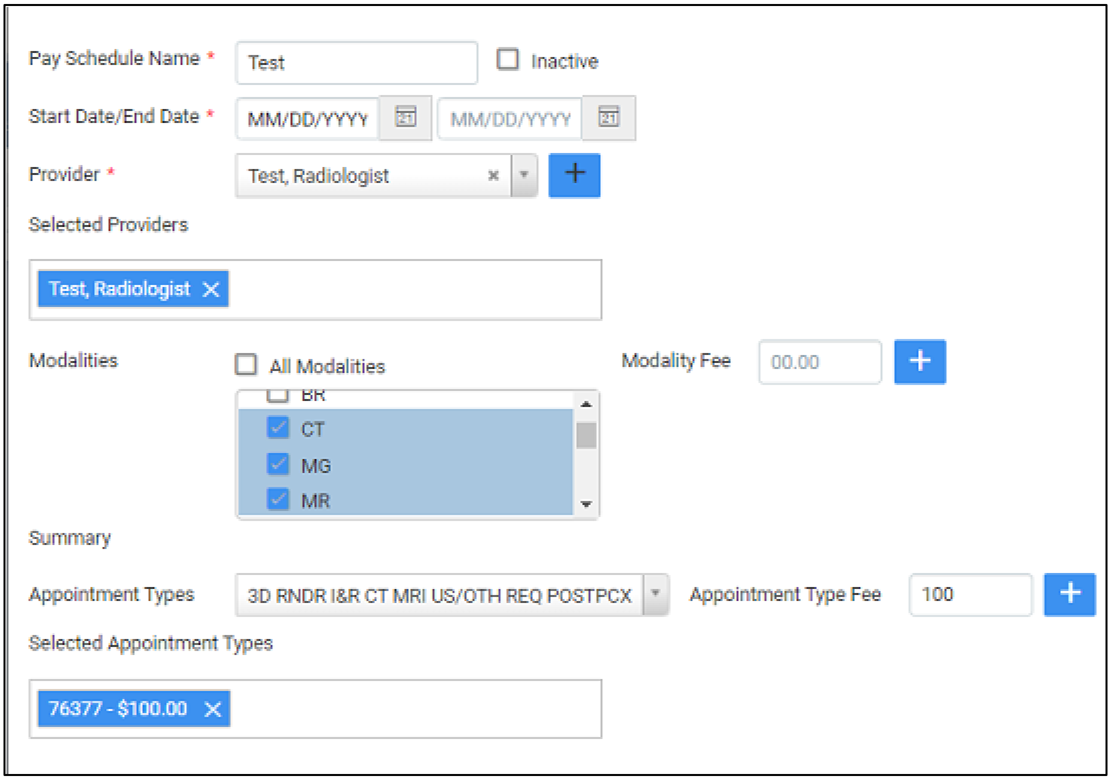
Prerequisite: Obtain the Provider Pay Schedule right.

Procedure

1. Go to SETUP > OFFICE > Providers & Resources > PROVIDER PAY SCHEDULE.



2. Select ADD.



3. Enter the following settings.

Setting	Description
Pay Schedule Name	Type a name for the pay schedule. Typically, this is the name or organization of the radiologist.
Start/End Date	Select a date range during which the pay schedule is valid.
Provider	Select a radiologist to assign to the providing organization, and then select the plus button. You can add multiple radiologists.
Modalities/Fee	Select one or more modalities to which to assign a fee. Type the fee to charge when using the selected modality during an exam, and then select the plus button. Add all modality/fee combinations that the provider offers.
Appointment Types/Fee	Select one or more appointment (exam) types to which to assign a fee. Type the fee for the selected exam, and then select the plus button. Add all appointment type/fee combinations that the provider offers. Note: Appointment type fees overwrite any overlapping modality fees.

4. 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.

This section contains the following topics (not all topics may be available depending on version and region).

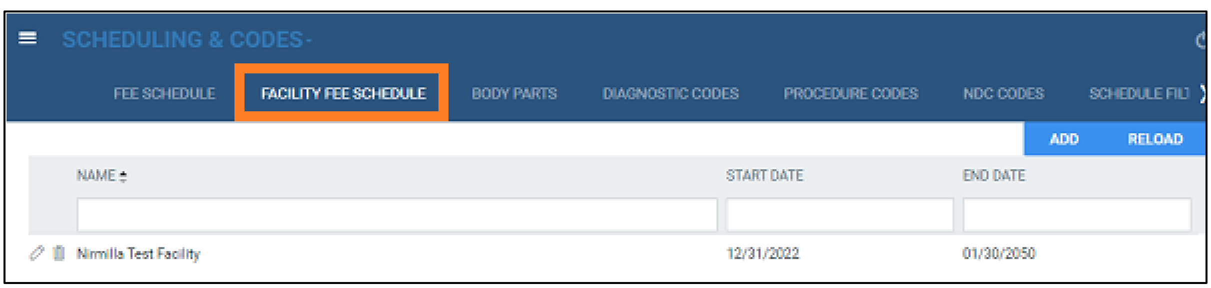
Configure a facility fee schedule
Configure body parts
Configure diagnostic codes
Import diagnostic codes
Configure procedure codes
Import specimen catalogs
Import procedure codes
Configure study statuses
Configure study flow
Add a transcription template
Add a report template
Configure functional and cognitive statuses

Configure a facility fee schedule

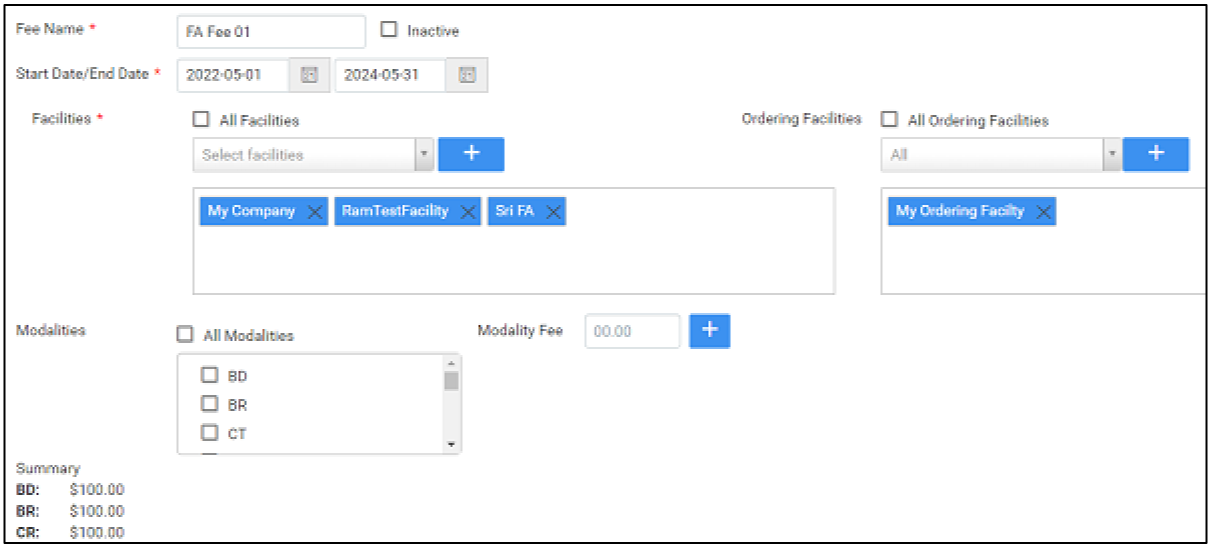
It can be useful to configure individual facility fee schedules if your fees differ by facility, or for teleradiology, or if you generate the Fees by Facility or Fees by Modality report.

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > FACILITY FEE SCHEDULE.



2. Select ADD.



3. 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.
Ordering Facilities	Select which ordering facilities use the fee schedule. If you make a selection, the Summary of Fees by Facility/Modality report pertains to studies associated with those ordering facilities.
Summary	Shows the total fees by modality. If at least one ordering facility is selected, the Summary applies only to OF fees.

4. Select SAVE.

See also:

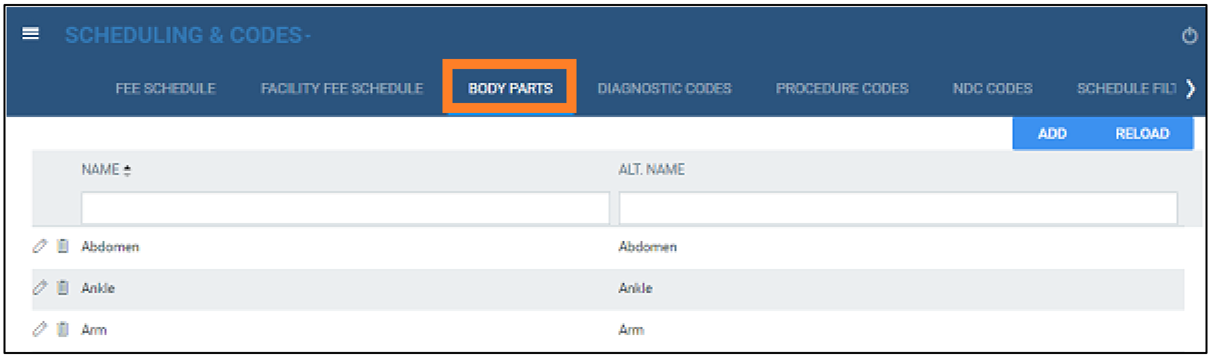
About fee schedules

Configure body parts

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

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > BODY PARTS.



2. Select ADD.

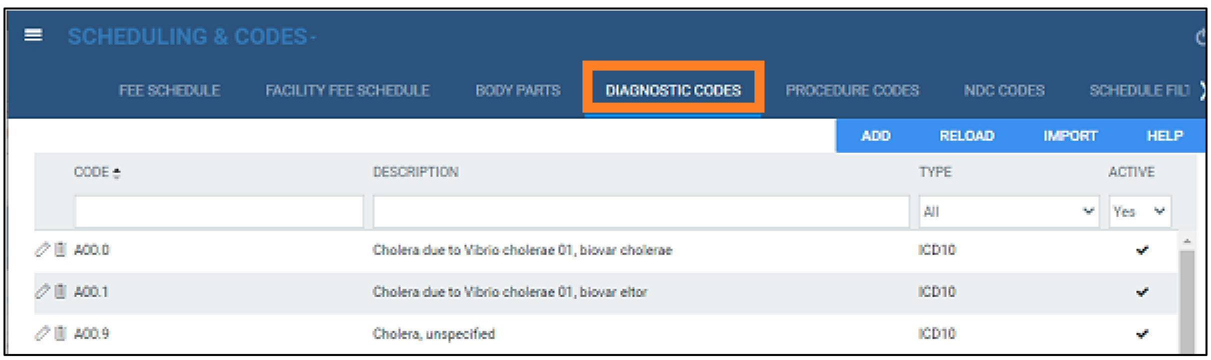
3. Type the name and alternative name for the body part, and then select SAVE.

Configure diagnostic codes

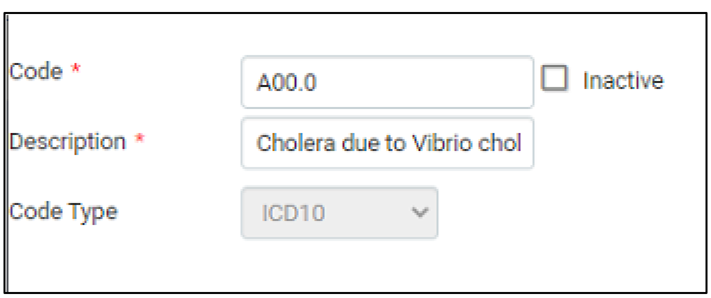
You can enter SNOMED, ICD, or LOINC codes for use in other parts of the program.

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > DIAGNOSTIC CODES.



2. Select ADD.



3. 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.

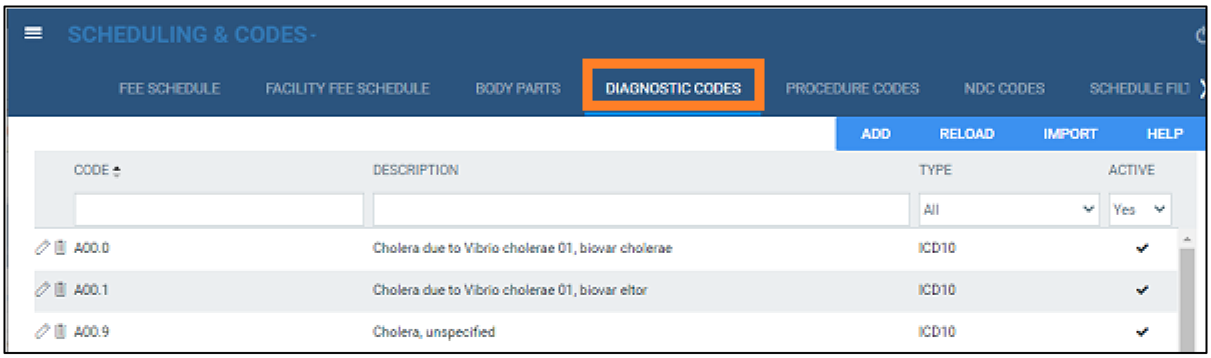
4. Select SAVE.

Import diagnostic codes

If you obtain exported diagnostic codes, such as from the CMS or AMA, you can import them for use in other parts of the program.

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > DIAGNOSTIC CODES.



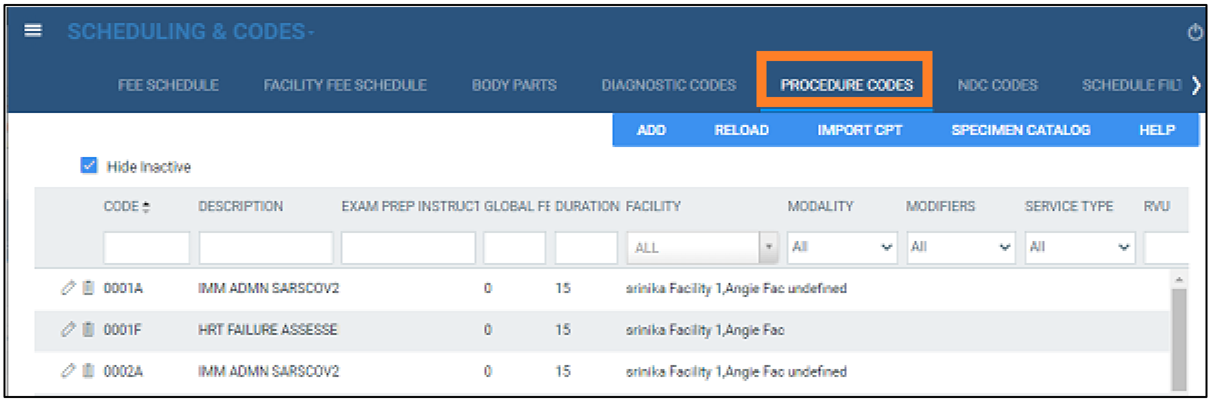
2. Select IMPORT.
3. Select Choose File, browse for and select the file to import, and select Open.
4. Optional. To replace existing facilities, select the Update Existing checkbox.
5. Select IMPORT.

Configure procedure codes

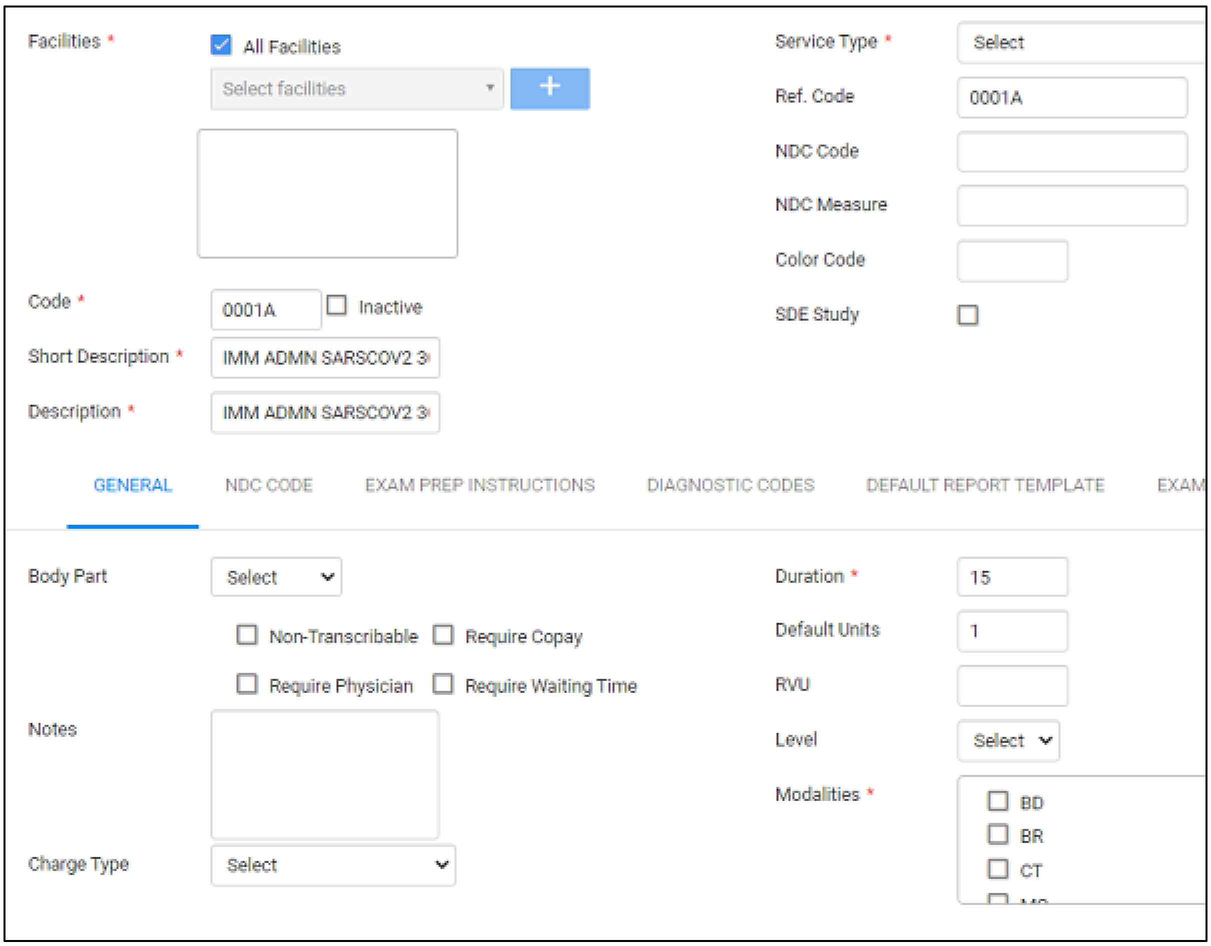
A *procedure code* is an internal code that identifies a medical procedure. Additionally, procedure code entries serve as detailed sets of information about procedures that Symmetry PACS uses for billing, ordering, and other functions.

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > PROCEDURE CODES.



2. Select ADD.



3. 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.

Setting	Description
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	[Exa PACS/RIS only]
NDC Measure	[Exa PACS/RIS only]
Color Code	Click inside 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.

4. Select SAVE.
5. 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.
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.

6. Optional. For EXAM PREP. INSTRUCTIONS, see Configure exam prep instructions.
7. 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.
8. Optional. To associate a diagnostic code with the procedure code, on the DIAGNOSTIC CODES sub-tab, select a code.
9. Optional. To select a report template to be used for the procedure, on the DEFAULT REPORT TEMPLATE sub-tab, do one of the following.
   - Under Template List, select an existing template.
   - Select NEW TEMPLATE, type a template name, create a template in the word processing area, and then select SAVE TEMPLATE.

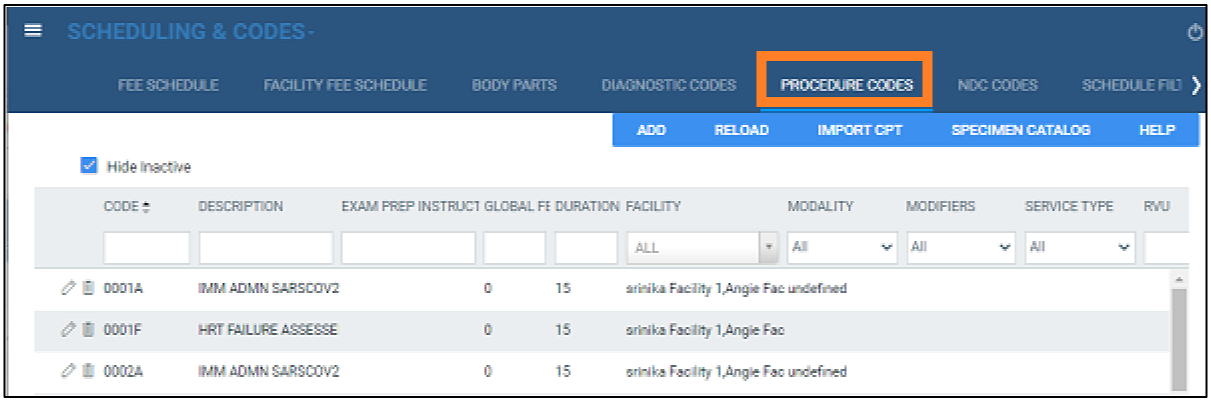
10. Select SAVE & CLOSE.

Import specimen catalogs

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

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > PROCEDURE CODES.



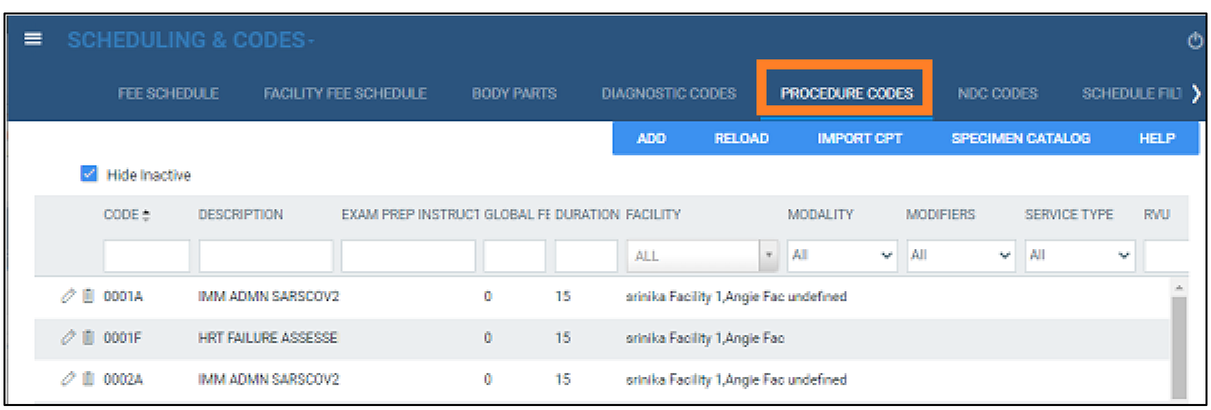
2. Select SPECIMEN CATALOG.
3. Select Choose File, browse for and select the file to import, and select Open.
4. Optional. To replace existing facilities, select the Update Existing checkbox.
5. Select IMPORT.

Import procedure codes

If you obtain exported procedure (CPT) codes, such as from the AMA or third-party billing companies, you can import them.

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > PROCEDURE CODES.



2. Select IMPORT CPT.

3. Select Choose File, browse for and select the file to import, and select Open.

4. Optional. To replace existing facilities, select the Update Existing checkbox.

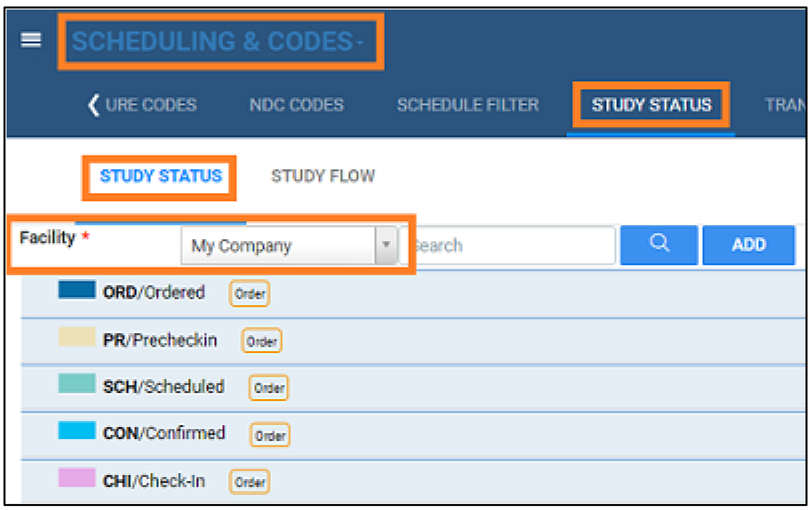
5. Select IMPORT.

Configure study statuses

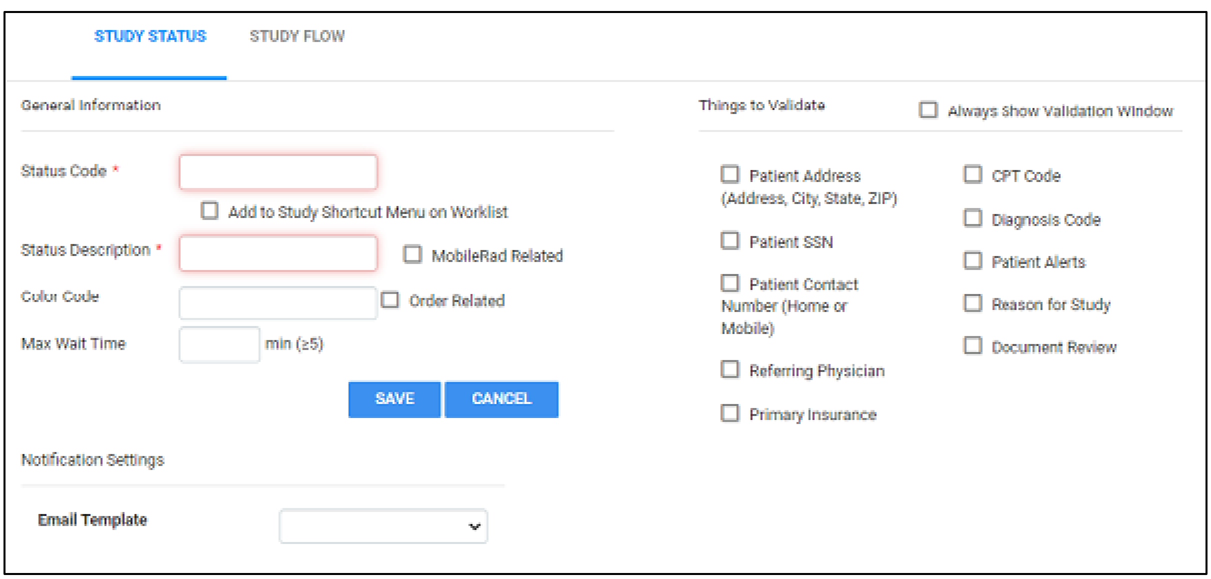
Workflows in Symmetry PACS are status-driven. To create or tailor workflows, you can create a set of study statuses, and then configure how studies move from status to status (see Configure study flow). To add statuses:

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > STUDY STATUS > STUDY STATUS.



2. In the Facility dropdown list, select a facility, and then select ADD.



3. 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 row shortcut menu on the worklist.
	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	Click inside the box, and then select a color from the picker to color code the status.
	Order Related	Select if the status applies to entire orders. Clear if the status applies to studies.
	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	Displays the validation results window whether or not you select any Things to Validate.
	[Other checkboxes]	Select the items that Symmetry PACS validates (checks for inclusion) before moving the study to the next status. If items are missing the validation window opens for you to add them.
Notification Settings	Email Template	Select a template to enable notification to be sent when a study arrives at the status. To select who receives the notification, turn on Notification settings of individual resources (see Add a resource).

4. 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 and how data can move to the next status in the flow. The easiest way to start a new flow is to copy one to a new facility by selecting the source and destination facilities in the lists (see figure) and selecting COPY.

Note: You do not need to apply routing rules for manual DICOM send operations.

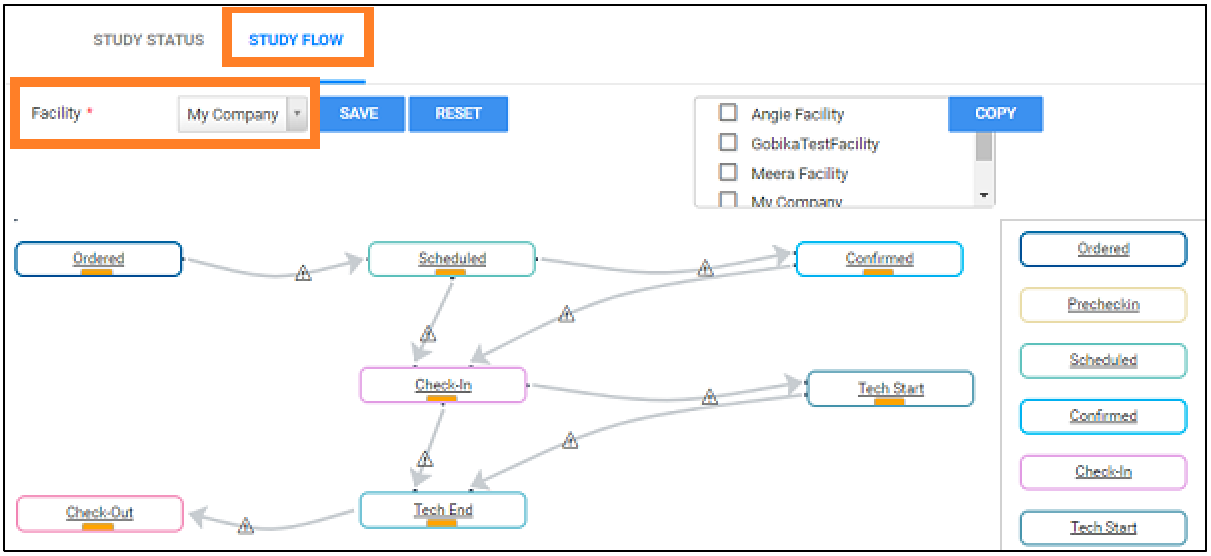
Caution:

- Changing the study flow incorrectly can "orphan" studies, leaving them unable to move to the next status in the workflow.
- Selecting RESET clears all non-saved changes and restores the default flow.

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > STUDY STATUS > STUDY FLOW.

2. In the Facility dropdown list, select a facility.



3. To modify the flow:

- Drag a status from the right pane into the main flow diagram.
- Drag the orange bar in a status node to another status, and drag arrows.

4. Optional: To add a routing rule between statuses:

- Selecting the triangle on an arrow.
- Under Actions, select a routing rule, and then select OK.

Result: When studies change between the statuses, they do so per criteria defined in the selected routing rule. For example, the routing rule might send the study to a specified AE along with user-defined priors. See Configure routing rules.

5. Optional: To force flow between statuses:

- Selecting the triangle on an arrow.
- Under Force Flow After, type or select a number of minutes.
- If available, select modalities to which the force flow applies.
- Select OK.

Result: Studies automatically flow between the statuses after the specified number of minutes.

6. Select SAVE.

See also:

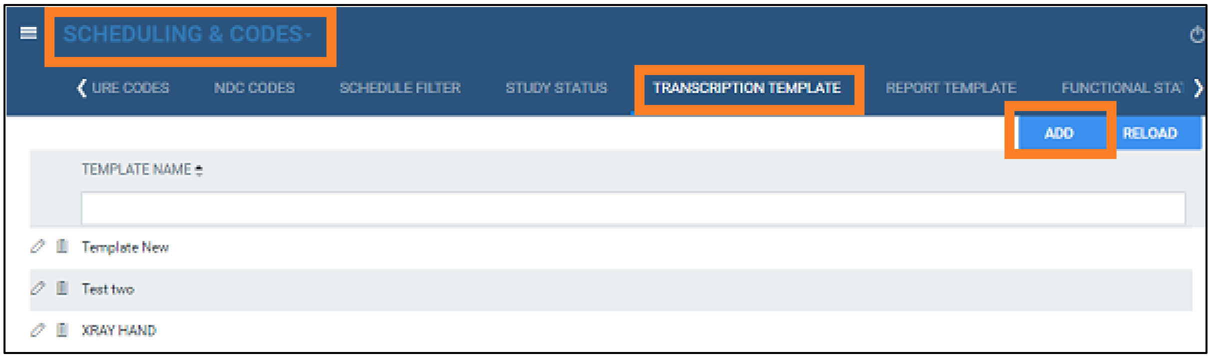
Configure study statuses

Add a transcription template

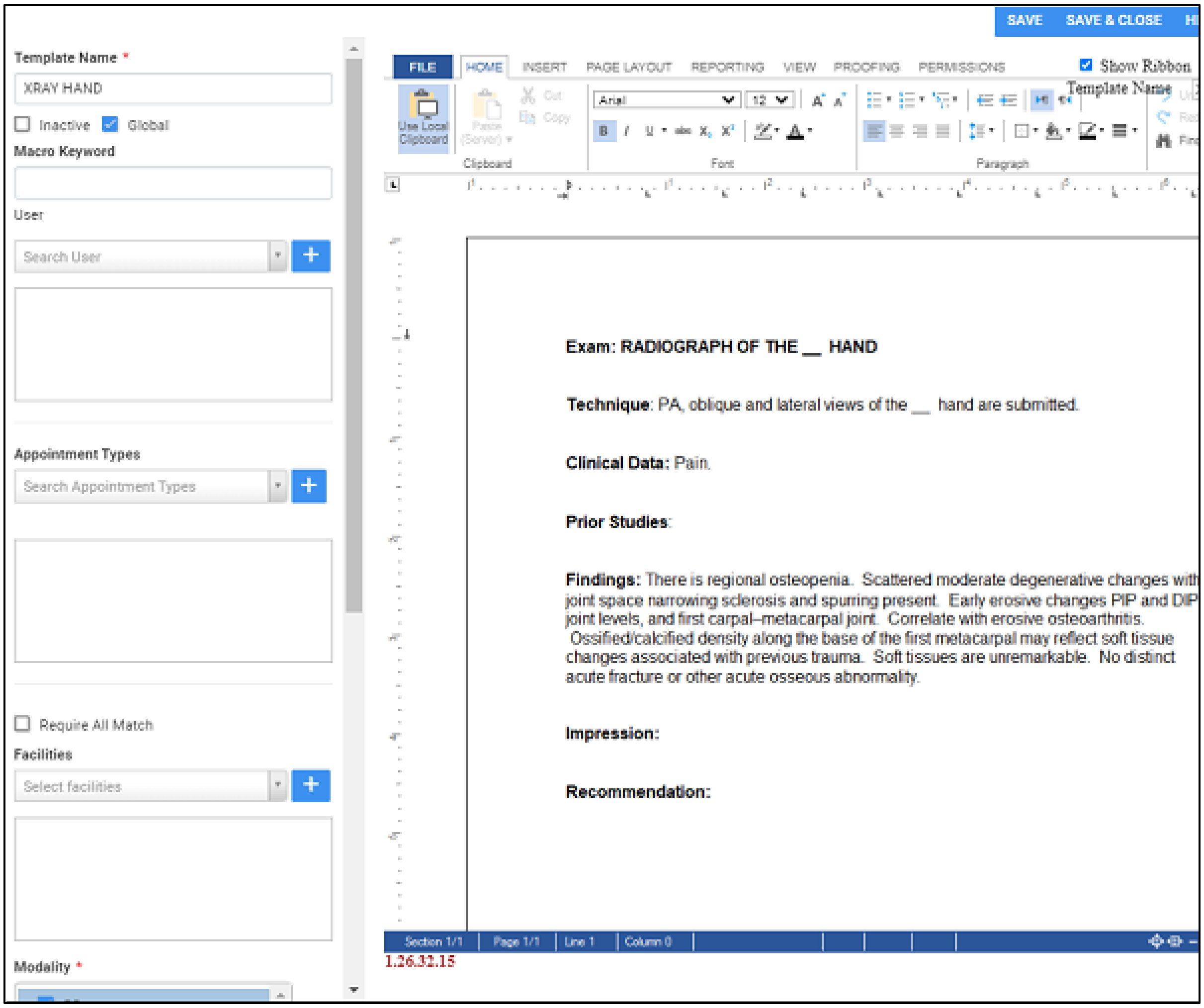
You can create a template that contains pre-formatted text and merge fields that you can quickly add to a transcription. This *transcription template* is for formatting a transcription, whereas a *report template* is for final formatting of approved reports. To use a transcription template, see Dictation and transcription with Exa Voice and Exa Trans. To create a transcription template:

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes > TRANSCRIPTION TEMPLATE.



2. Select ADD.

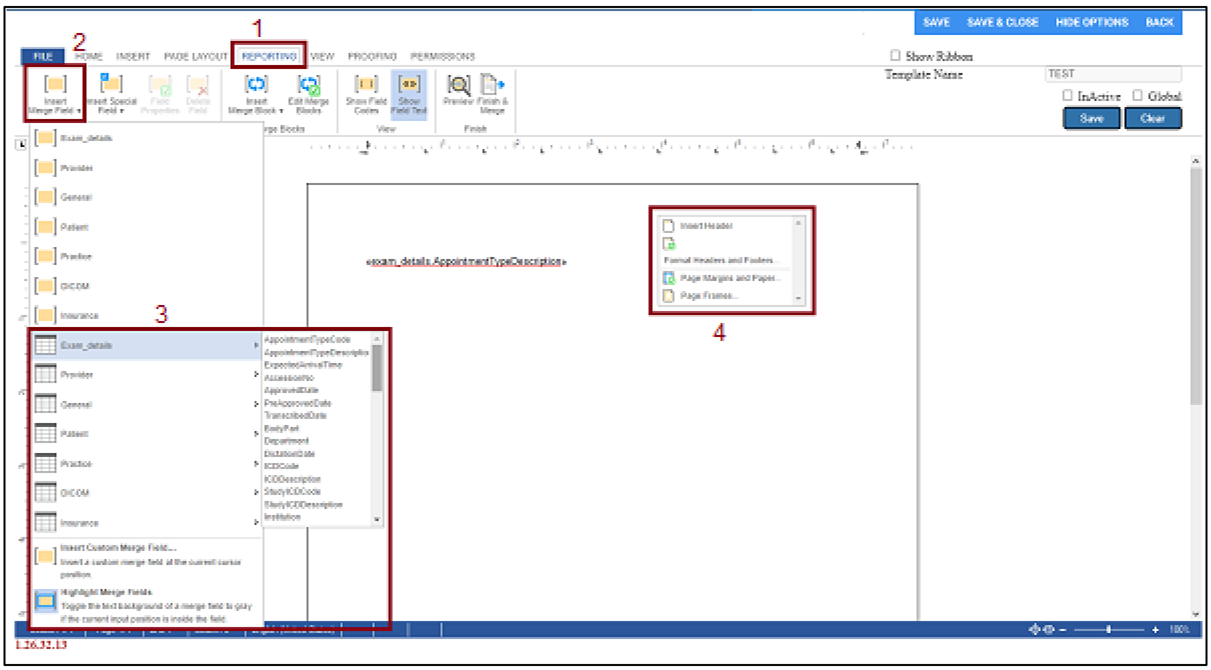


3. On the left pane, enter the following settings.

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 keyword that can be voice-recognized to open a template. Tip: Add a starter word in front of the keyword to make it easier to call up macros/templates. Example: macro chest
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	Select for which appointment types (CPT codes) the template is available.
Require All Match	The template is only available to users and studies who match all criteria you enter here.
Facilities	Select for which facilities the template is available.

Setting	Description
Modality	Select for which modalities the template is available.
Body Part	Select for which body parts the template is available.
Study Description	The template is only available for studies with the study description you enter here.
Institution	Select for which institution the template is available.

4. Select SAVE.
5. In the template editor, type text and apply formatting for the template, and then select SAVE.
6. 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.
7. To add merge fields, select REPORTING (1) > Insert Merge Field (2), and then select a merge field (3).



8. For formatting options (4), right-click in the body of the template.
9. When finished with your template, select SAVE & CLOSE.

Add a report template

A *report template* is for final formatting of approved reports, whereas a *transcription template* is for preparing transcriptions. You can create report templates and enhance them with logos, tables, and merge fields. When you approve a study, Symmetry PACS generates the approved report using a template you create here.

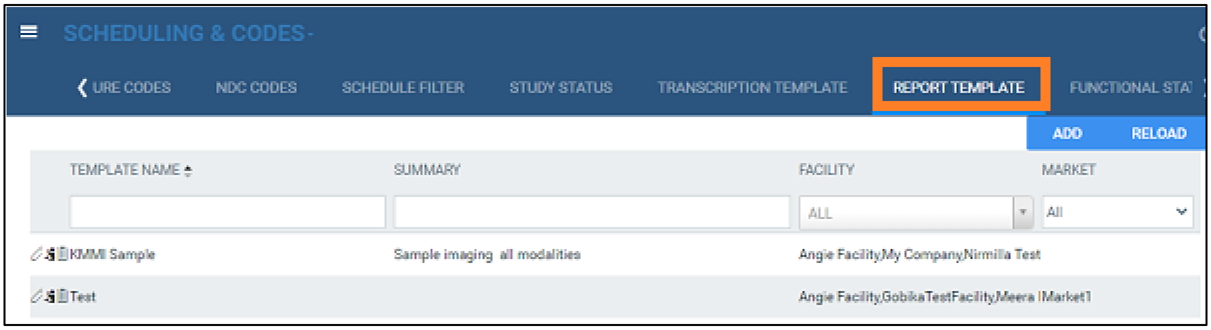
Which template is used?

The template settings must match the facility and modality of the study. If several templates match, the highest one in the list is used. If none match, none are used, and the approved report contains only the body of the transcription.

Add a report template

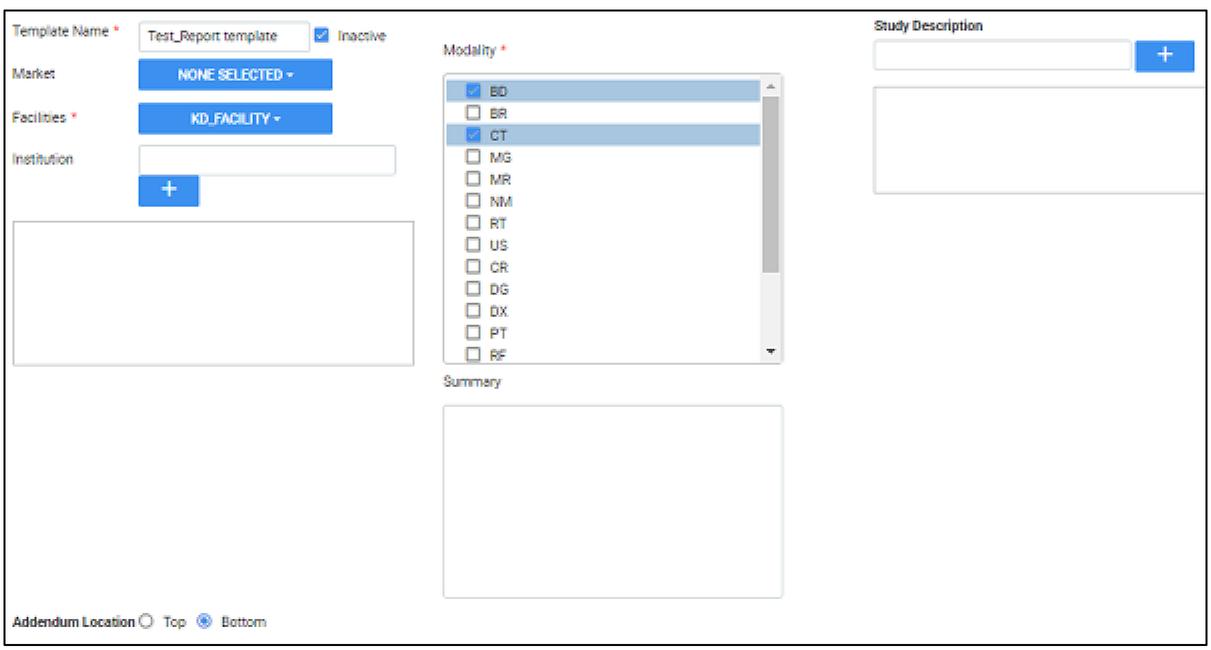
Add a report template with the following steps, and then continue to the next procedure to edit the header or footer.

1. Go to SETUP > OFFICE > Scheduling & Codes > REPORT TEMPLATE.



2. Do one of the following.

- To base the new template on an existing one, select the copy button of the existing template.
- To edit an existing template, select its edit button.
- To start a new template from scratch, select ADD.



3. Enter the following settings.

Setting	Description
Template Name	Type a name for the template.

Setting	Description
Market	Optional. Select the market to associate with the template. All facilities in the selected market become selected in the Facilities dropdown list.
Facilities	Select all facilities that use the template.
Institution	Select institutions that use the template.
Modality	Select all modalities to which the template can apply.
Summary	Type explanatory information about the template.
Study Description	Type study descriptions for the templates to be applied. For example, US Abdomen could have a different template than MRI Abdomen.
Addendum Location	Top: Select to place addenda before the original report (top of the first page). Bottom: Select to place addenda after the original report (bottom of the last page).

4. Select SAVE.

5. Perform the steps in the following subsections as needed.

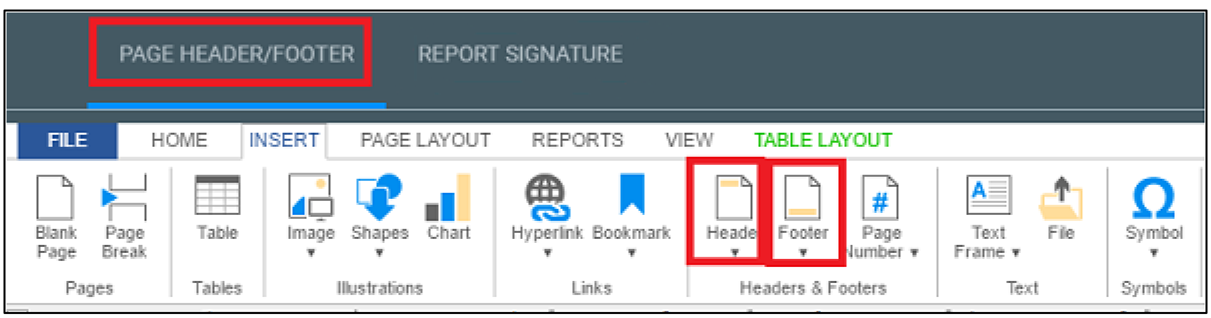
Add a header and footer

You can configure the header and footer of a report template, or edit existing ones.

1. At the bottom of the page, select the PAGE HEADER/FOOTER sub-tab.

   Result: The word processor appears (it may take a few moments).

2. On the INSERT tab, select Header or Footer, and then in the button shortcut menu, select Edit Header or Edit Footer.



3. Type information for the header or footer.

4. Select SAVE.

Add a table

Although not required, it can be helpful to organize information on your header with a table.

1. On the INSERT tab, select Table, and then in the button menu:

   - Select a cell layout, or
   - Select Insert Table dialog, enter table settings and then select OK.

2. Type text in cells, and select Save.
3. See below to add logos and merge fields to the table.

Add a logo

1. Prepare a bitmap image and save it in the following:

   [drive]:/EXA/WebImages

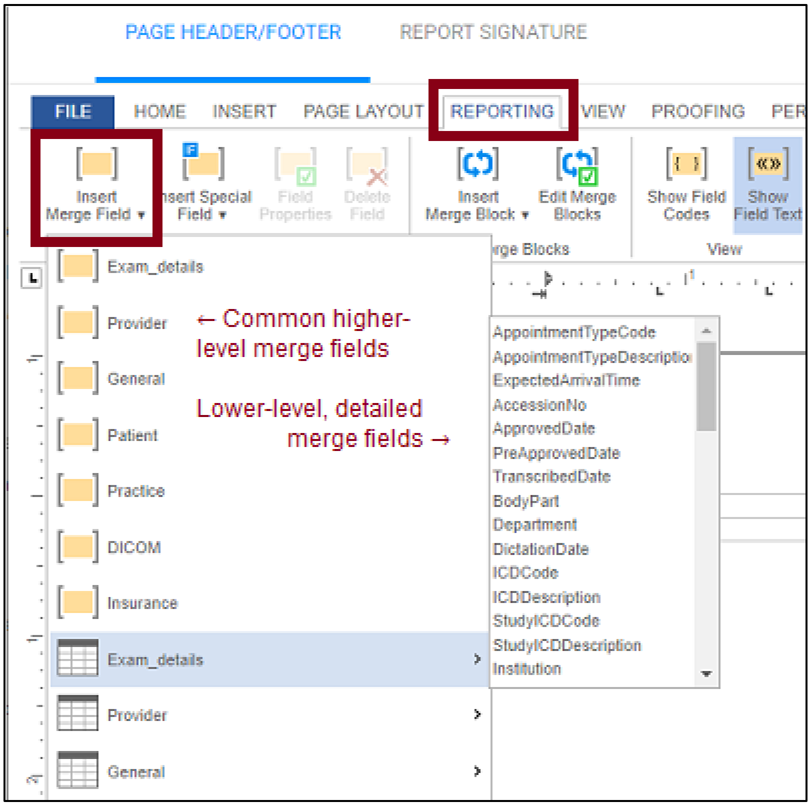
2. Place the cursor in the header or footer where you want to place the logo.

   Note: It may be helpful to add carriage returns to make room for the logo.

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

Add merge fields

1. Place the cursor in the header or footer where you want to add the merge field.
2. On the REPORTING tab, select Insert Merge Field.



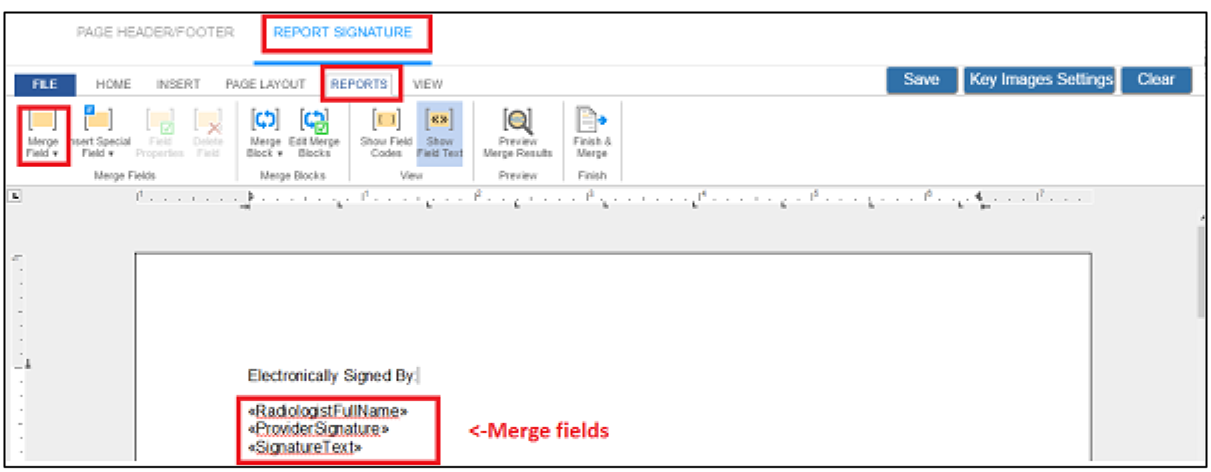
3. On the Merge Field button shortcut menu, select a merge field, or choose a field from one of the sub-menus.

4. Select Save.

Add a report signature line

1. Select the REPORT SIGNATURE sub-tab.

2. Type text and add merge fields as described earlier.



3. Optional: To include a key image in the signature area, add the <<keyimages>> merge field.

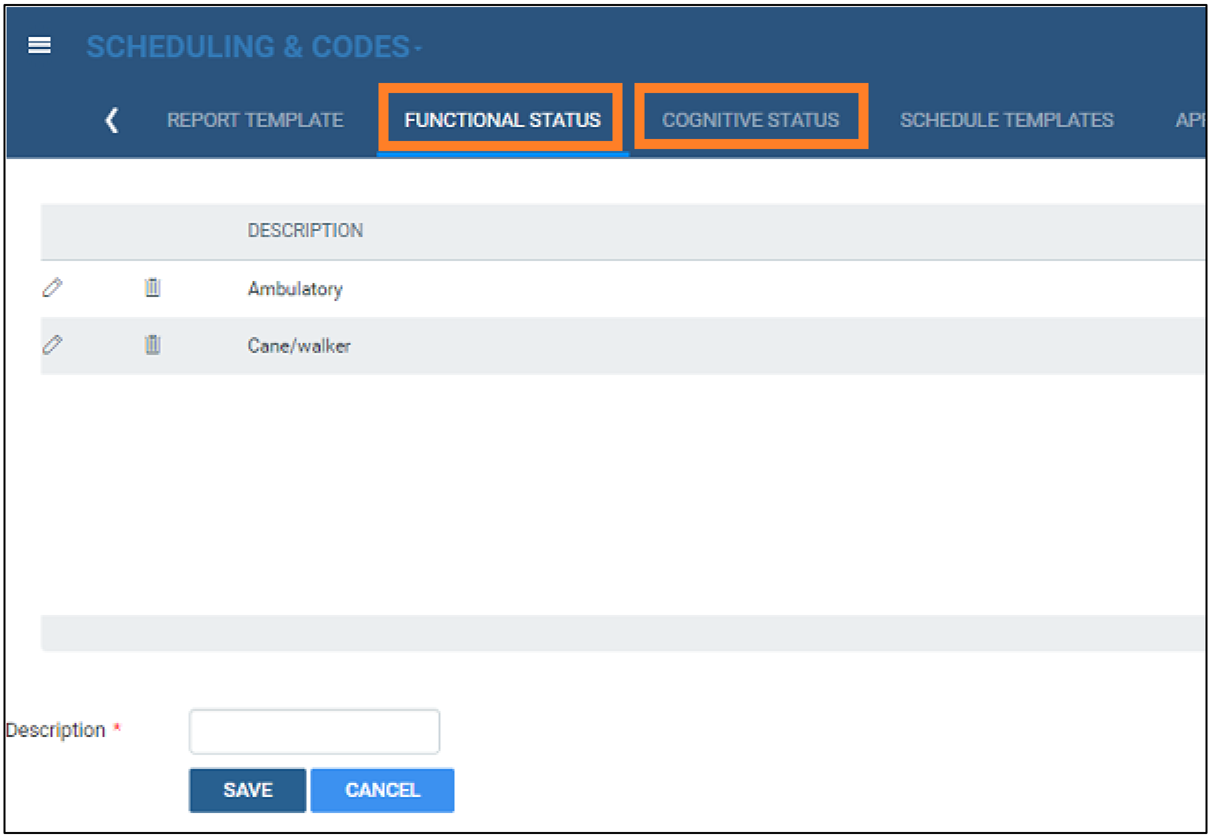
4. Select the SAVE buttons on the top and bottom of the screen.

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.

Procedure

1. Go to SETUP > OFFICE > Scheduling & Codes.
2. On the FUNCTIONAL STATUS tab, in the Description box, type a functional status and then select SAVE.



3. On the COGNITIVE STATUS tab, in the Description box, type a cognitive status and then select SAVE.

Configure DICOM settings

Administrators can configure DICOM settings such as for AEs, file stores, and 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.

This section contains the following topics (not all topics may be available depending on version and region).

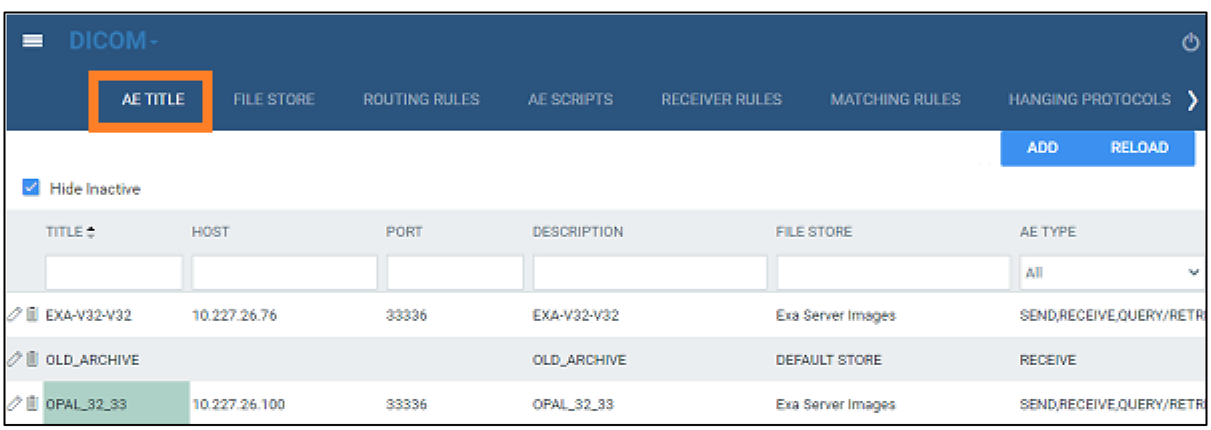
Configure application entities

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.

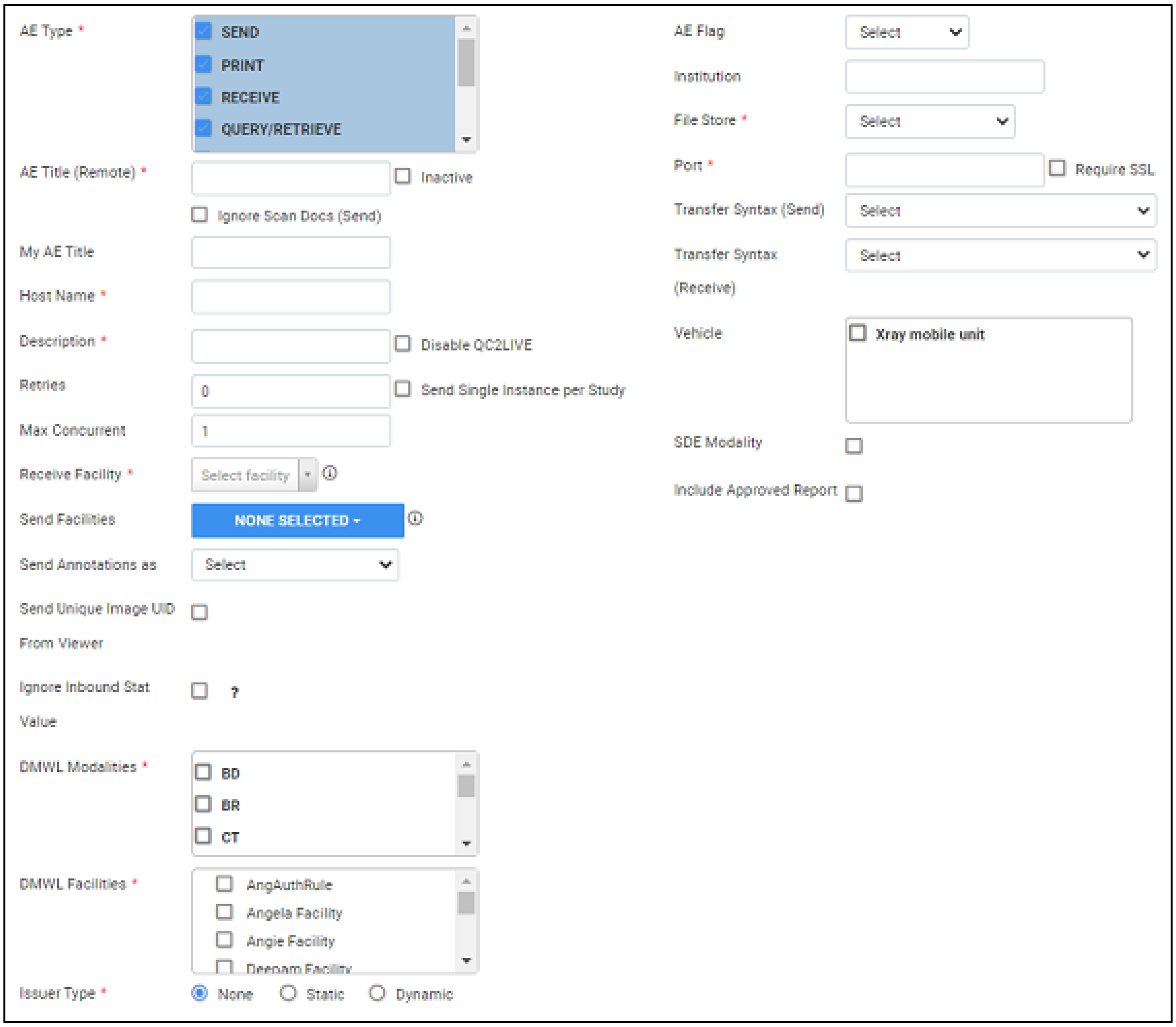
> Caution: Failure to correctly configure application entities can cause general failure of DICOM communication between Symmetry PACS and those entities.

Procedure

1. Go to SETUP > OFFICE > DICOM > AE TITLE.



2. Select ADD.



3. Enter the following settings, and then select SAVE.

Note: The actual settings that appear on screen differ by the AE types you select.

Setting	Description
AE Type	Select one or more transactions that Symmetry PACS makes with the AE.
AE Title (Remote)	Type a title for the AE of up to 16 characters. If an AE title is preconfigured 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 of up to 16 characters 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).

Setting	Description
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.
Receive Facility	Select a facility to receive studies sent to the AE.
Send Facilities	If you select facilities here, only users assigned to those facilities can select them for DICOM-sending (leave blank for all facilities and users).
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	[Exa PACS/RIS only]
SDE Modality	Select if the AE is a dedicated echo ultrasound.
Include Approved Reports	Select to include approved reports in transactions.

See also:

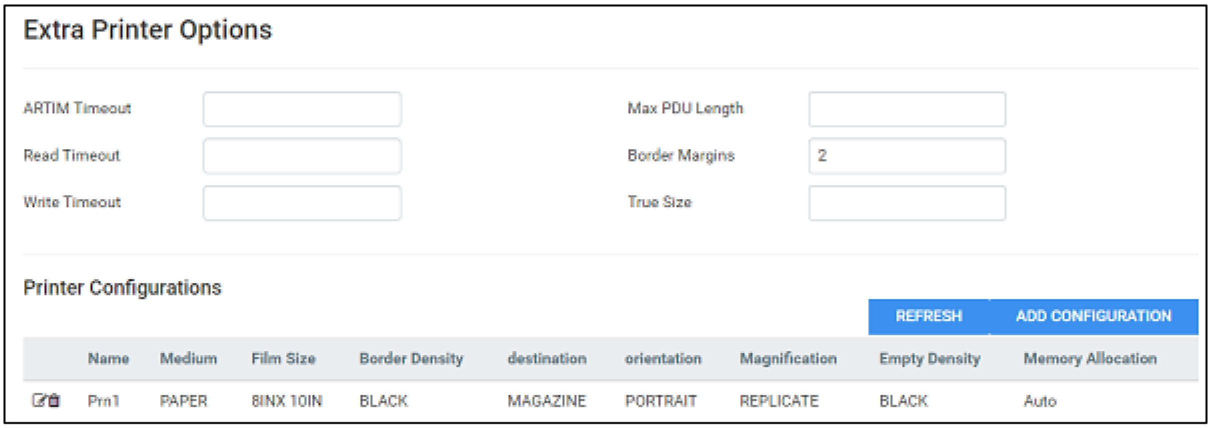
Configure a DICOM printer

Configure a DICOM printer

Configure and save AE with AE type of “Print,” and then perform the steps below. For each printer you can save multiple configurations for different print media and other settings. At print time, you can select the configuration you need.

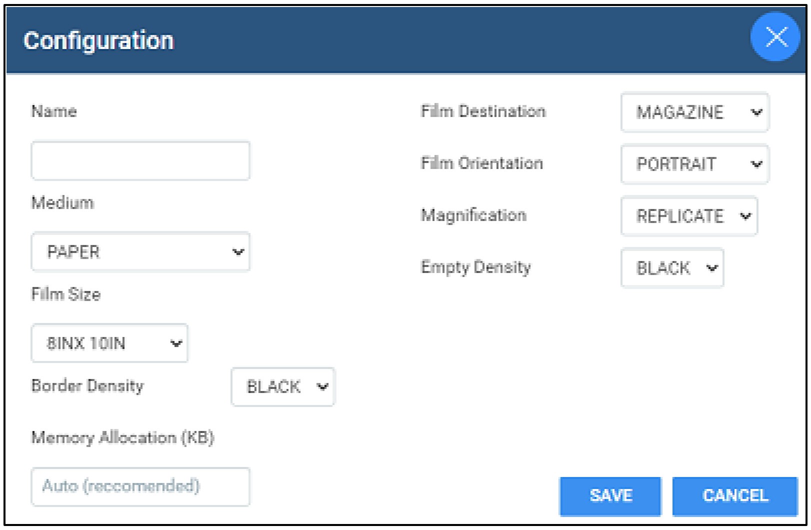
Procedure

1. Go to SETUP > OFFICE > DICOM > AE TITLE.
2. Configure a print AE, and then under Extra Printer Options, enter the following settings.



Setting	Description
ARTIM Timeout	Type the number of minutes to wait for an acceptance or rejection response to an association request before timing out.
Read Timeout	Type the number of minutes the printer waits to receive data before timing out.
Write Timeout	Type the number of minutes the printer waits to send data before timing out.
Max PDU Length	Type the maximum number of bytes of a protocol data unit that the printer can receive.
Border Margins	[Unused]
True Size	[Unused]

3. Select ADD CONFIGURATION.



4. 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.

5. Select SAVE.

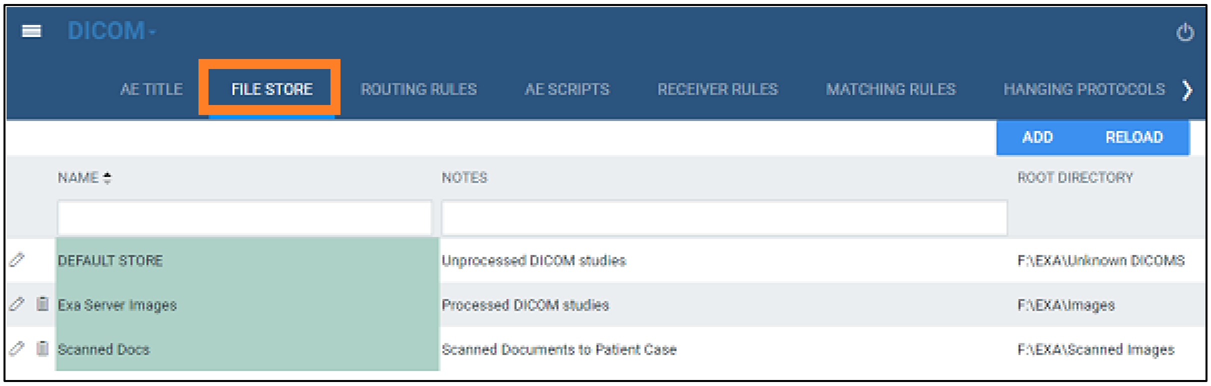
Configure a file store

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.

Procedure

1. Go to SETUP > OFFICE > DICOM > FILE STORE.



2. Select ADD.

3. Type the server name, root directory, and notes, and then select SAVE.

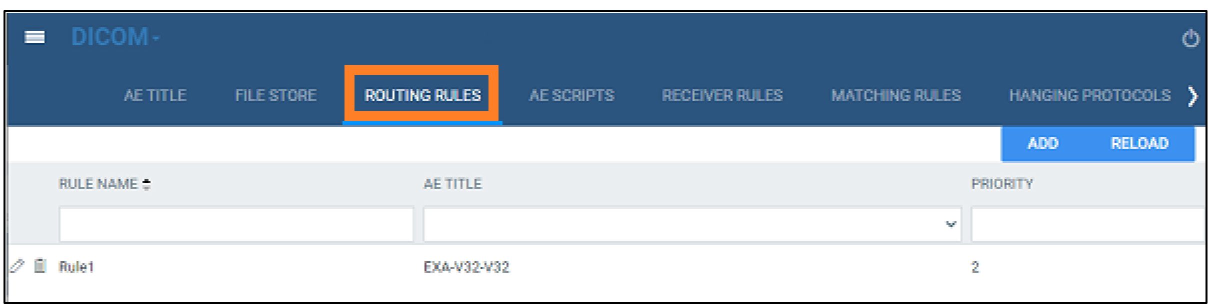
Configure routing rules

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, your rule could limit sending of ultrasound data from only a specific facility.

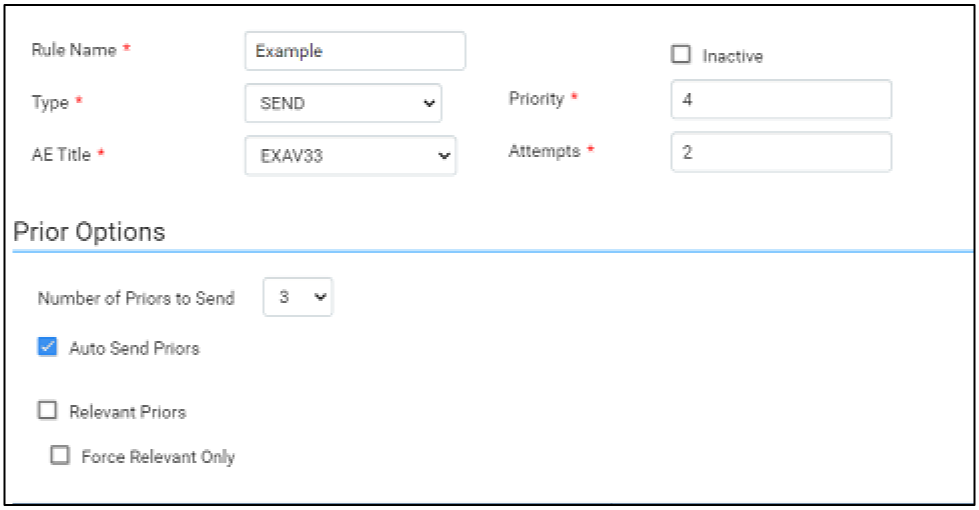
Use the following procedure to configure a routing rule, and then apply the rule by following the steps in "Configure study flow." It is not necessary to apply routing rules for manual DICOM send operations.

Procedure

1. Go to SETUP > OFFICE > DICOM > ROUTING RULES.



2. Select ADD.



3. Enter the following settings. The available settings change depending on the AE type that you select in the Type dropdown list.

Setting	Type	Description
Rule Name	All	Type a name for the rule.
Type	All	Select the transaction to perform with the AE (for example, SEND).
Interface/Trigger Name	HL7 Send	Select an interface and/or trigger for HL7 send actions.
AE Title	SEND PRINT QUERY/RETRIEVE Send Report (Opal) LOCAL_CACHE	Select the AE with which to perform the transaction (for example, select Remote_Hospital to send to that AE).
Priority	SEND PRINT QUERY/RETRIEVE Send Report (Opal) HL7 Send LOCAL_CACHE	Type a number to indicate which rules to evaluate first. Lower numbers take higher priority. Refer to your current list of rules on the ROUTING RULES tab to determine the priority to use for the rule you are adding.
Attempts	SEND PRINT QUERY/RETRIEVE Send Report (Opal) HL7 Send 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 retrieve instances for the current study only.

Setting	Type	Description
Modality	QUERY/RETRIEVE	Select an option to filter which priors to retrieve.
Prior Options		
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. • The system sends as many priors as it can find, up to the Number of Priors to Send. • The system sends the most recent priors first.
Relevant Priors	SEND LOCAL_CACHE	Select to send relevant priors when auto-sending, along with any non-relevant priors that the system found. Enter criteria to define what is relevant (see below). • If you do not define relevant priors (see "Define relevant priors" later in this topic), 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 Numbers of Priors to Send. • If the system finds fewer relevant priors than the Number of Priors to Send, it adds non-relevant priors up to the number.
Force Relevant Only	SEND LOCAL_CACHE	Select to send only relevant priors. • If the system finds fewer relevant priors than the Number of Priors to Send, it does not send any additional priors.
[Define relevant priors]	SEND LOCAL_CACHE	Available when you select Relevant Priors. See "Define relevant priors" later in this topic.

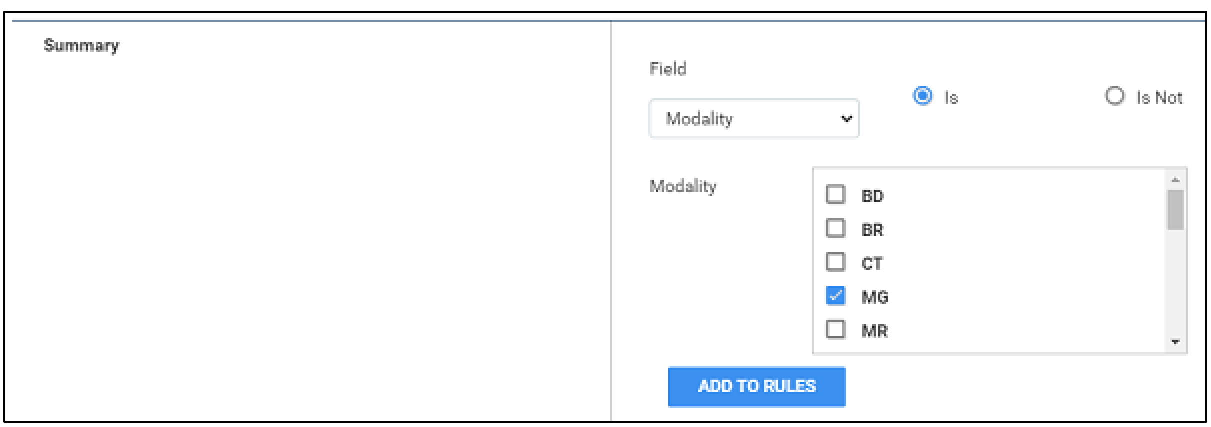
4. Optional. Configure a criterion for the rule:

   a. In the Field dropdown list, select an argument and a logical operator.

      For example, *Modality* and *Is*

   b. Select a matching value for the argument.

      For example, in the *Modality* list, select *MG*.



   c. Select ADD TO RULES.

Result: In this example, when Symmetry PACS receives an MG study, it automatically sends it to the AE named Remote_Hospital.

6. Optional. Add more criteria.
7. Select SAVE.

Auto Query/Retrieve: use study's accession number

To facilitate Auto QR of studies from external sources such as the AHS, configure a query-retrieve routing rule with a placeholder to match the study's accession number rather than the study instance UID (SUID) in Symmetry PACS. This rule only applies if the Priors count is 0. Create the routing rule as follows:

1. In the TYPE dropdown list, select QUERY/RETRIEVE.
2. In the Priors box, type `0` (zero).
3. In the Field dropdown list, select Accession #, and select the Is option.
4. In the criterion box, type `{{accession_no}}`.
5. Select SAVE.

Define relevant priors

Defining relevant priors allows you to send only priors that are relevant to the current study based on study description, modality, or body part. To write definitions for which priors are relevant you use a syntax called *relevant prior logic:*

```
STRING or (STRING|STRING|...){.*(STRING|STRING|...)}
```

"A single string, or multiple strings delimited with a bar, optionally followed by ".*" plus multiple strings delimited with a bar."

Enter your relevant prior logic in a table, such as in this example:

Prior settings on the left... ...main study settings on the right

Prior Modality	Prior Body Part	Prior Description	Main Study Modality	Main Study Body Part	Main Study Description	
CT			MR			
	(KNEE|PATELLA)			KNEE		
		(HEEL|CALC).*(LEFT|LT|BI)			(HEEL|CALC).*(LEFT|LT|BI)	
						SET

Row 1: Does not require relevant prior logic. When the main study is an MR, relevant priors are CTs.

Row 2: When the main study is of the knee, relevant priors are either of the knee or patella.

Row 3: When the main study description contains "HEEL" or "CALC" followed by "LEFT," or "LT," or "BI," relevant priors are those whose descriptions also contain "HEEL" or "CALC" followed by "LEFT," or "LT," or "BI."

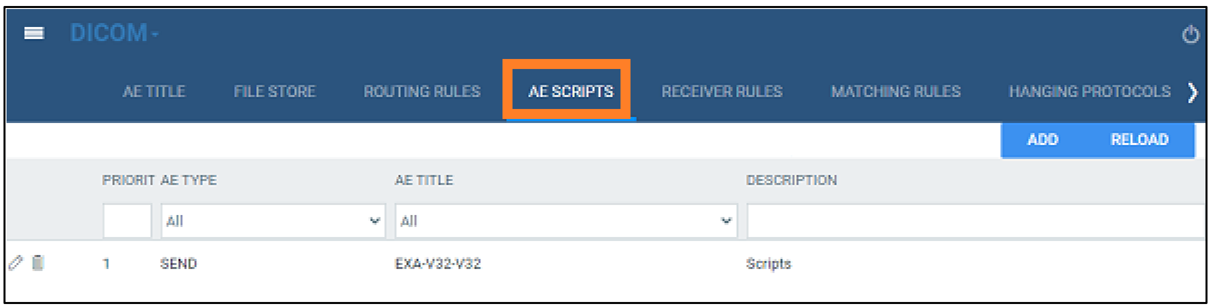
> Note: You can also define relevant priors that you want to auto-open in the viewer (see Configure modality-specific viewing options).

Configure AE scripts

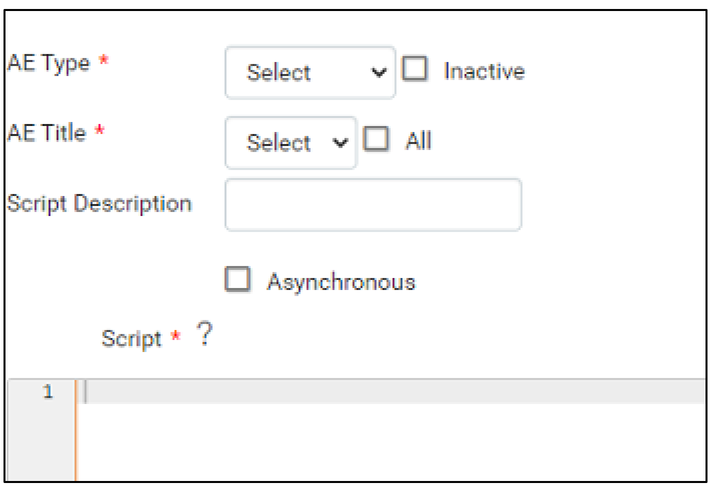
You can write scripts that modify DICOM tags when carrying out a DICOM-related transaction such as sending, printing, or receiving.

Procedure

1. Go to SETUP > OFFICE > DICOM > AE SCRIPTS.



2. Select ADD.



3. Enter the following settings.

Setting	Description
AE Type AE Title	Select a transaction and node. The script runs when Exa makes the selected transaction with the selected node.
All	Select all AEs of the selected AE Type.
Script Description	Type a description of the script.

Setting	Description
Asynchronous	Select to run the script asynchronously.

4. In the Script area, type the script to run when the previous conditions are true.

   Note: For syntax, select the help ? button.

5. Select COMPILE, and correct any errors that occur.

6. 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.

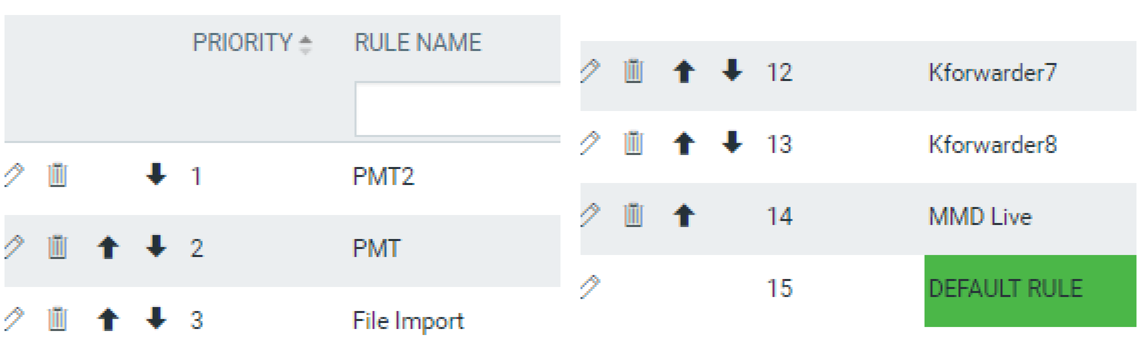
To understand how receiver rules are evaluated and applied, it is helpful to imagine a 4-step process that Symmetry PACS performs for each incoming study.

- 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

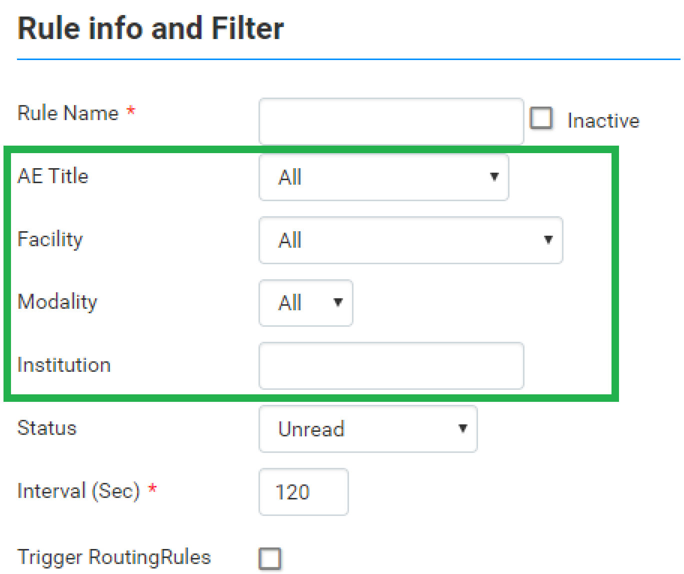
When Symmetry PACS receives a DICOM study, it evaluates the study against each receiver rule on the RECEIVER RULES tab in order of "Priority" (starting from the top) until it finds one that matches.



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.

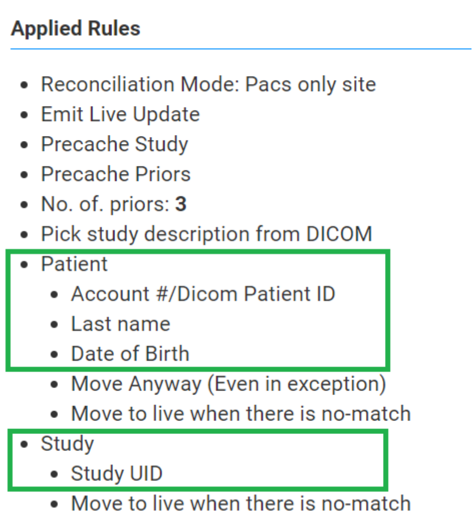
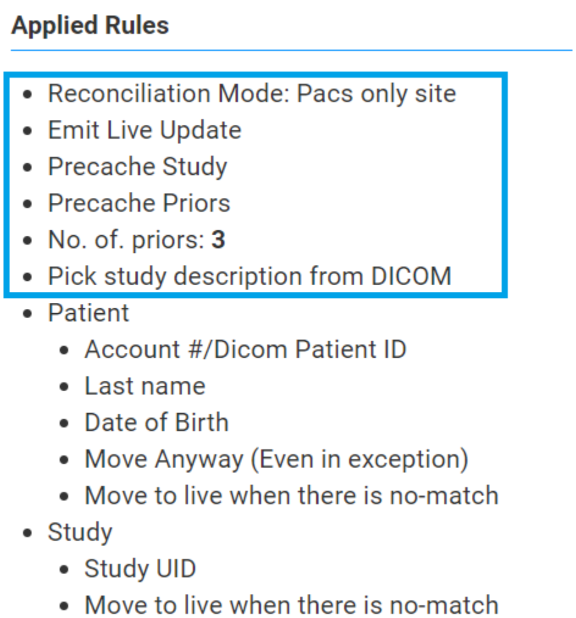


Figure: Applied rules in the PACS ONLY preset.

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.

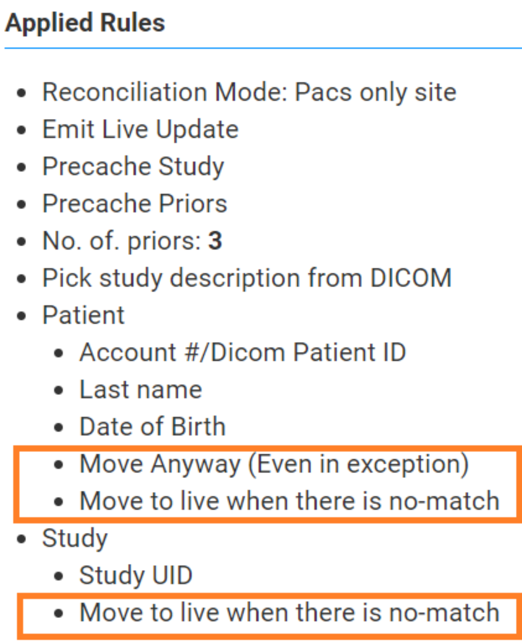
Step 3 – Process successes

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.



Step 4 – Process failures

If matching failed, the study initially remains on the QC tab with a status of *Conflicts* to await reconciliation by the user. However, there is one more set of evaluations left to make, based on the items in the orange boxes in the following figure.



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

Move Anyway (Even in exception)

If duplicate matching demographics are found, or if at least one matching criterion fails, the study also appears on the ALL STUDIES tab with a status of “FIX_.”

Patient: Move to live when there is no-match

The study moves to the ALL STUDIES tab even if patient demographic validation fails. Generally, this is used only when no modality worklist is available.

Study: Move to live when there is no-match

The study moves to the ALL STUDIES tab, even if no matching order is found.

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

See also:

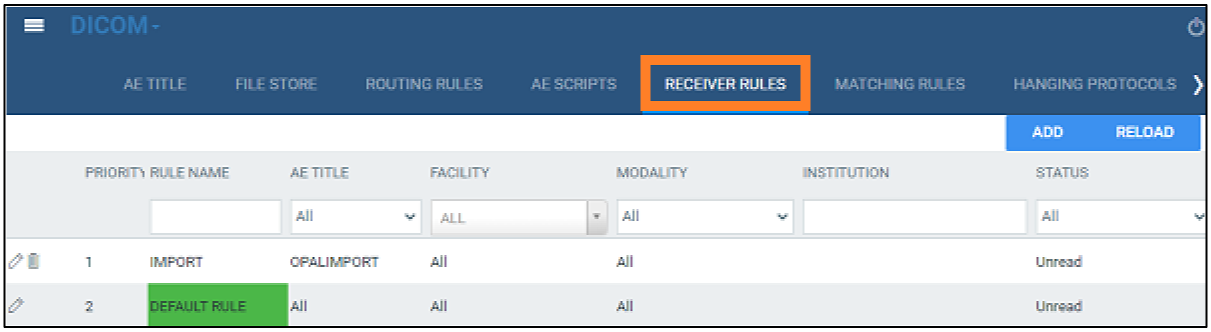
Configure a receiver rule

Configure a receiver rule

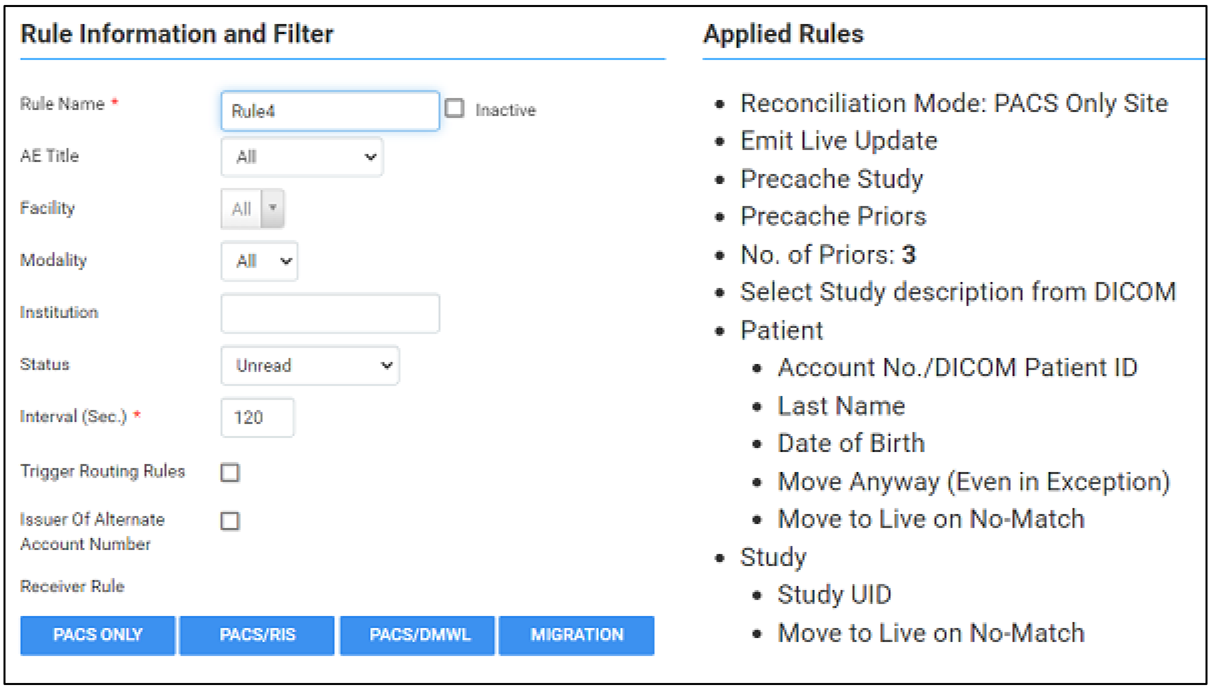
You can configure receiver rules to tell Symmetry PACS where to place studies that it receives, and what status to assign to them. For more information, see Understanding receiver rules.

Procedure

1. Go to SETUP > OFFICE > DICOM > RECEIVER RULES.



2. Select ADD.



Example showing the PACS ONLY rules

3. 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).

Setting	Description
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 Add alternate account numbers to a patient chart.

4. Select one of the following preset buttons to assign a reconciliation mode and to add "applied rules" (matching criteria and actions to perform) to your receiver rule.

Preset Button	Reconciliation Mode	Description
PACS ONLY	PACS	Validate patient and study items against existing PACS records.
PACS/RIS	PACS + RIS	Validate patient and study items against existing PACS records and/or RIS orders.
PACS/DMWL	PACS + RIS	--same--
MIGRATION	PACS	Use when migrating data from another PACS. Allows everything to be received.

5. Select SAVE.

See also:

Understanding receiver rules

Configure matching rules

See Work with Display Management.

Configure hanging protocols

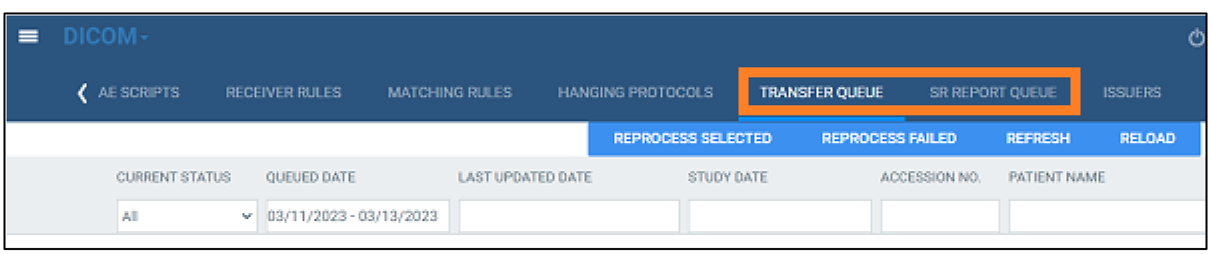
See Work with Display Management.

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.

Procedure

1. Go to SETUP > OFFICE > DICOM > TRANSFER QUEUE or SR QUEUE.



2. 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 Configure alternate account number functionality.

Manage users

For access to Exa PACS/RIS and selected functions, administrators configure individual users, user groups, Active Directory users and groups, and assign roles (rights) to users. Create user roles first, user groups second, and then individual users.

Caution: Incorrect user configuration can lead to security risks such as leaked patient information.

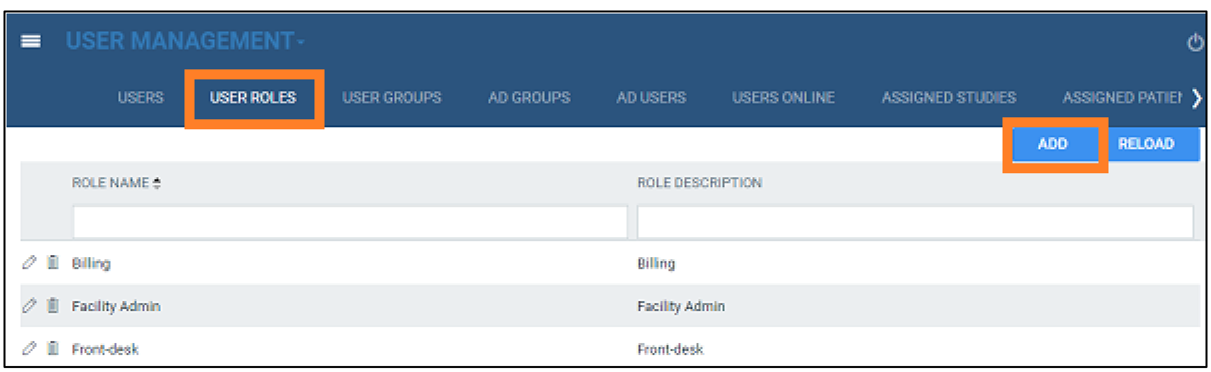
This section contains the following topics (not all topics may be available depending on version and region).

Create a user role

A *user role* is a named collection of rights and permissions that you can assign to user groups. To create a user role, complete the following steps.

Procedure

1. Go to SETUP > OFFICE > User Management > USER ROLES.

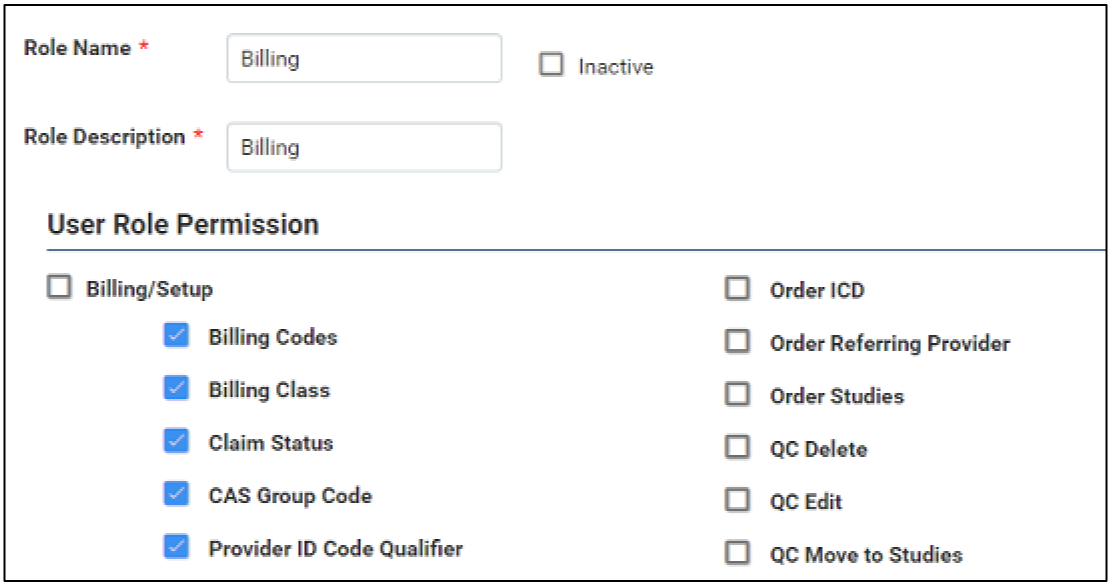


2. Select ADD, type a name and description of the role, and the select SAVE.

   For example, type `BILLING`, and then select SAVE.

3. In the User Role Permission area, select all of the rights that you want to assign to the user role.

   Hint: To find rights, type Ctrl + F.



4. Select SAVE & CLOSE.

See also:

[Create a user group](#)
[Create a user](#)

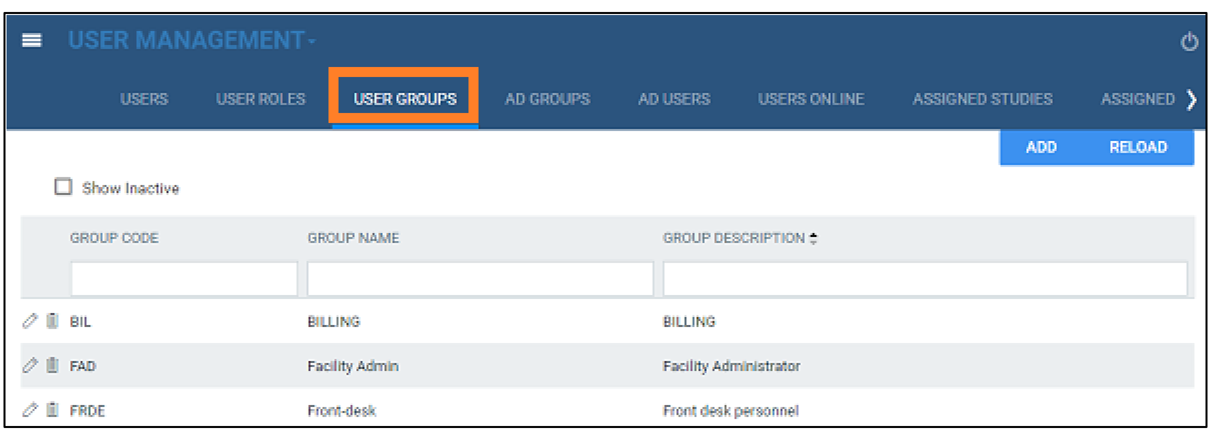
Create a user group

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.

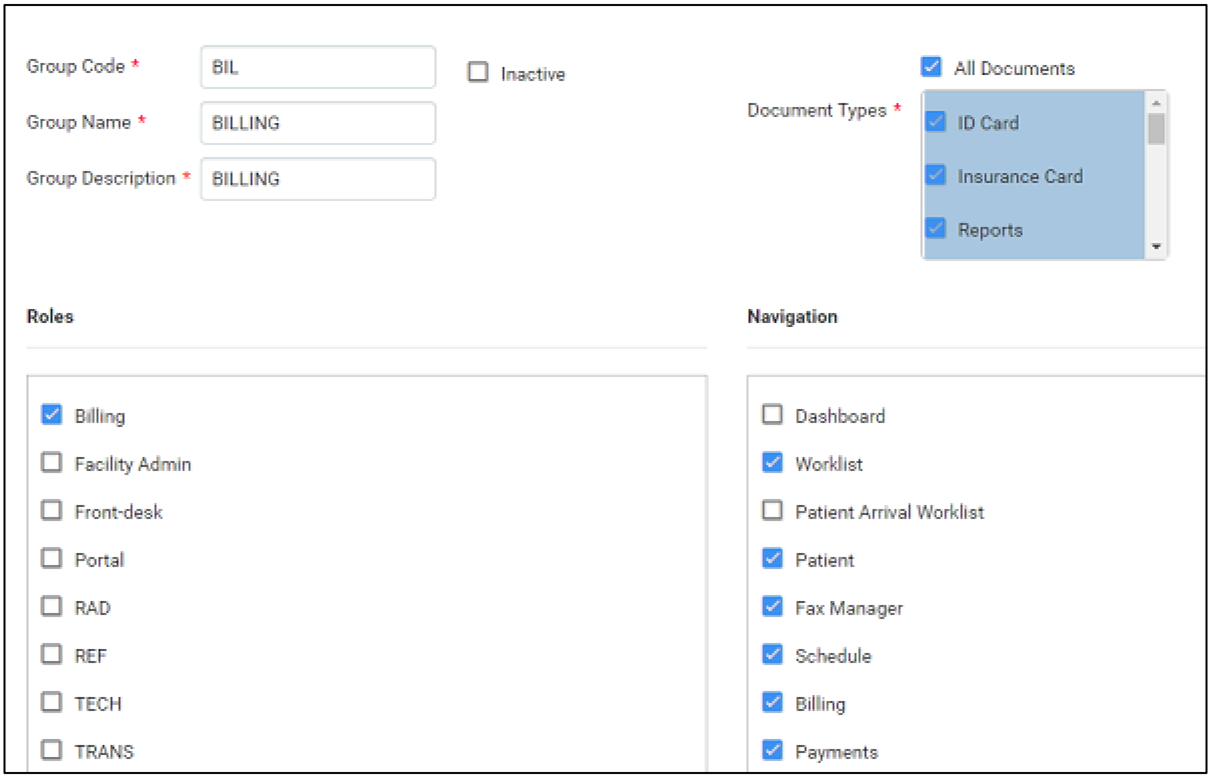
> Prerequisite: [Create a user role](#).

Procedure

1. Go to [SETUP](#) > [OFFICE](#) > User Management > USER GROUPS.



2. Select ADD.



3. Enter the following settings.

Setting	Description
Group Code	Type your internal code for the group. For example, RAD. Do not edit the names of built-in group codes as they are tied to other functionality.
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. All Documents: Selects all current and future documents.
Roles	Select the user role that you want the group members to have. Choose only one unless assigning elevated permissions to specific users. Example: The Technologist User group has the Technologist User role. Only the lead technologist is permitted to purge studies and merge studies. To accommodate this, create a user role with only the merge and purge rights, then create a separate user group and select the technologist user role and the new user role. Finally, apply the separate user group to the Lead Tech User.
Navigation	Select the areas of the program that group members can access (items available on the burger menu). Note: • This only allows opening the item, and certain user rights may be required to work in a given area. • Even if selected here, the Fax Manager requires activation to open.

4. Select SAVE.

See also:

Create a user

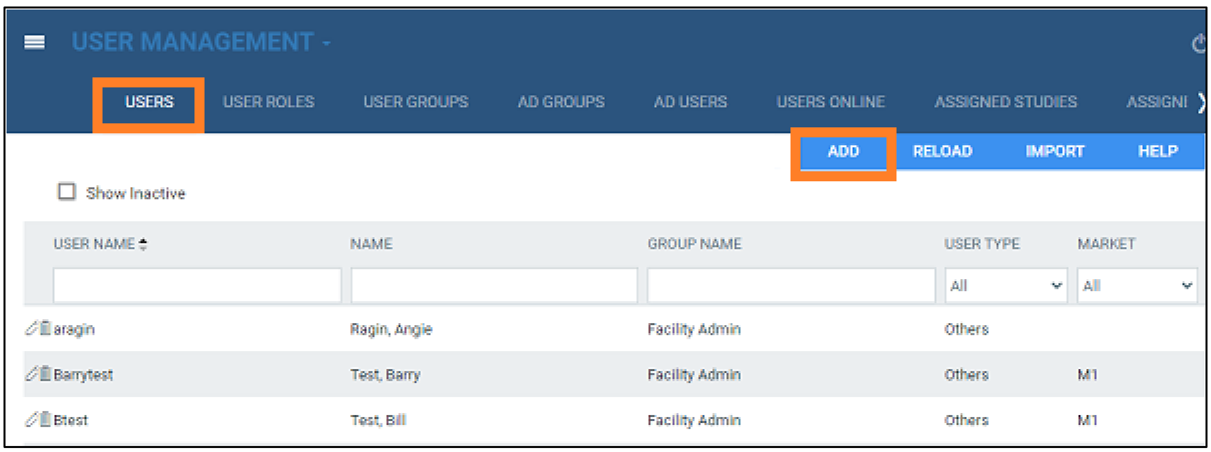
Create a user

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.

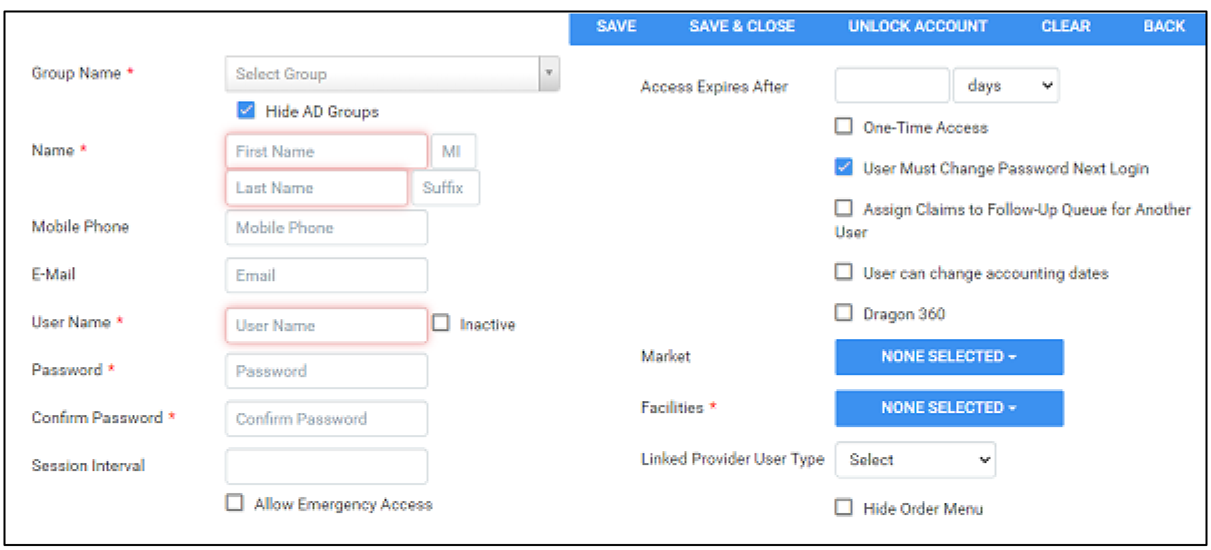
Prerequisite: Create a user group.

Procedure

1. Go to SETUP > OFFICE > User Management > USERS.



2. Select ADD.



3. Enter the following settings.

Not all settings may be available depending on your product and configuration.

Caution: A password is configured or used on this page. For recommended security, turn off Chrome autofill.

Setting	Description
Group Name	Select the user group to which the user belongs. Select Portal to limit the user to a portal; this removes any Exa or Symmetry rights. Note: This does not grant portal access to the user. To grant access, set the Linked Provider User Type (see below) to one with a portal, such as Provider.
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 if using two-factor authentication.
User Name	Type a sign-in user name for the user.
Inactive	Select to disable the user account. If extra security is needed, also change the user's password.
Login with Google	When selected, the user can sign in through their Google account.
Netcare access	Select to grant the right 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 near “super user” (full) rights to the user regardless of roles or groups.
Linked Ordering Facility	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 require the user to create their own password after signing in the first time.
User Can Change Accounting Dates	When selected, the user can edit accounting dates under Billing > Payments.
Dragon 360	[To be discontinued]
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. Select All means "Select all current and future facilities."
Linked Provider User Type	If the user is also a resource, select the user type to link, and then select the user in the dropdown list that appears.
Hide Order Menu	[To be discontinued]
Ordering Facility	Available when you select Ordering Facility.

Setting	Description
	Select the ordering facility whose portal the user can sign into.
Patient Search Type	Available when you select Provider or Ordering Facility. Select the range of patient and other data that the user may search: Associated Patients Only: The provider only sees patients associated with their resource on worklists. Full Database: The provider is not restricted to seeing their patients only.
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:

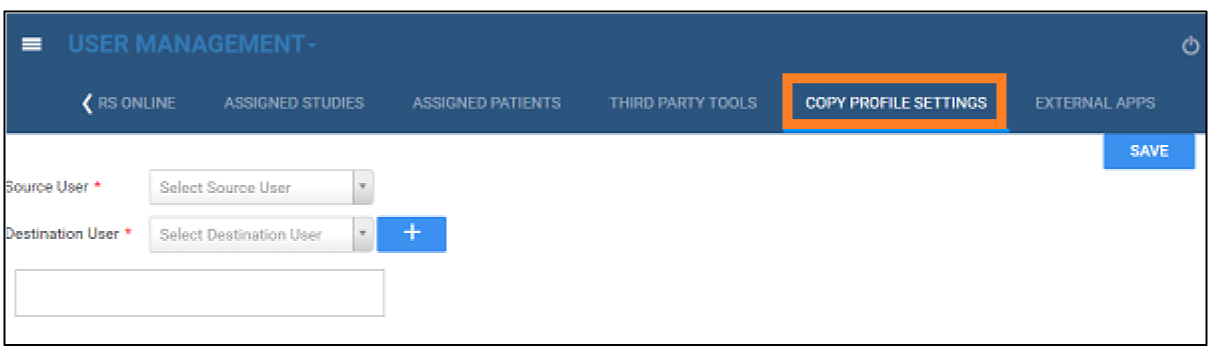
Copy settings from one user to another
Create a user role

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.

Procedure

1. Go to SETUP > OFFICE > User Management > COPY PROFILE SETTINGS.



2. In the Source User dropdown list, select the user whose settings you want to copy.
3. In the Destination User dropdown list, select a user to configure with the source user's settings, and then select the plus button.

Caution: Never overwrite the Rad test or Ref test users. Instead, copy to an account of a different name or create a new account.

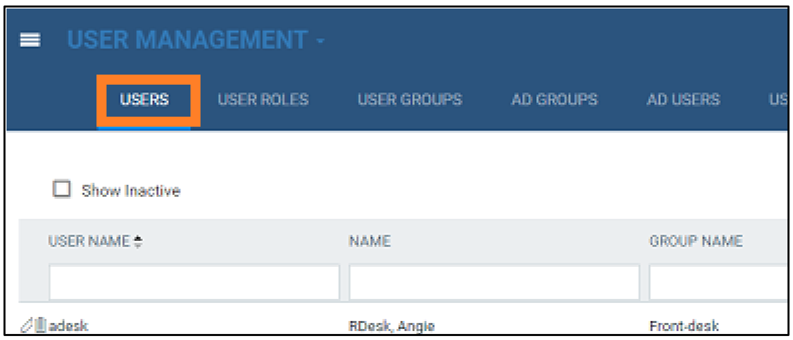
4. Optional. Repeat to configure additional users with the source user settings.
5. Select SAVE.

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.

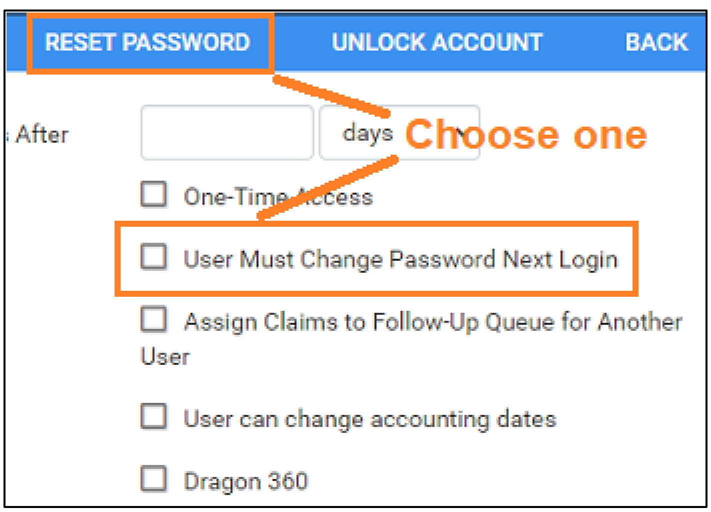
Procedure

1. Go to SETUP > OFFICE > User Management > USERS.



2. 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.



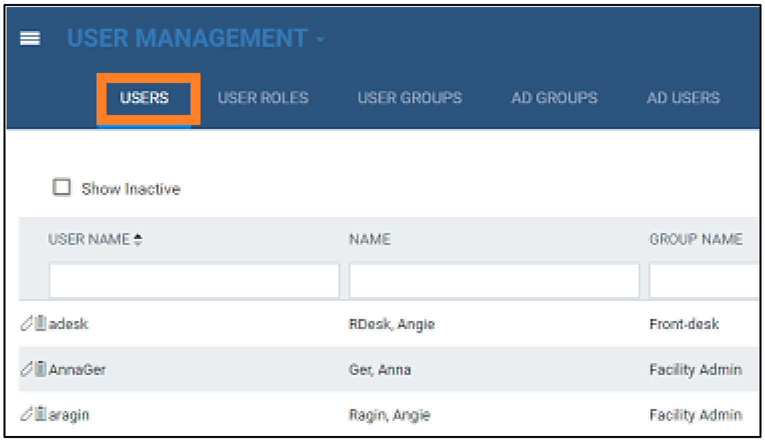
3. Select SAVE.
4. Inform the user to sign out and then sign in again with the new password, or follow the on-screen instructions to reset their password.

Configure an administered worklist filter

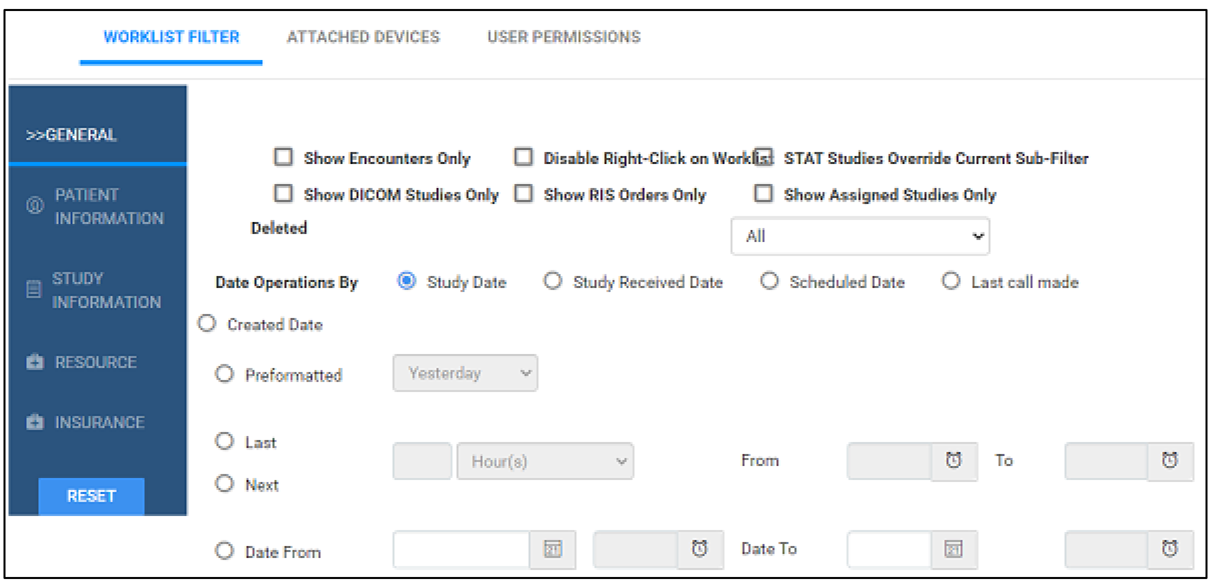
In addition to user roles, administrators can use the following steps to configure worklist filters that control which studies, patients, and other information are available to individual users and user groups. Users can configure their own worklist filters but cannot edit filters that administrators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

Procedure

1. Go to SETUP > OFFICE > User Management > USERS.



2. Double-click a user row to open a user, and select the WORKLIST FILTER sub-tab.



3. Perform one or more of the following procedures.

Configure general user worklist filter settings

You can finely control the information on the worklist to which the user has access.

1. In the left pane, select GENERAL.

2. Enter the following settings, and then select SAVE.

Setting	Description
Show Encounters Only	Select to show only studies involving interaction between a patient and provider.
Show DICOM Studies Only	Select to show only DICOM (imaging) studies.
Disable Right-click on Worklist	Select to prevent the user from opening the worklist shortcut menu.
Show RIS Orders Only	Select to show only orders from RIS.
STAT Studies Override Current Sub-Filter	Select to always show studies with assigned stat levels, regardless of any other filtering criteria.
Show Assigned Studies Only	Select to show only studies to which a user is assigned.
Deleted	Select whether to show all, only, or no (None) deleted studies.
Configure the following settings together to compose a single filtering condition.	
Date Operations By	Select a study property against which to apply criteria. Study Date Study Received Date Scheduled Date Last Call Made Created Date
Preformatted	Select from a list of preformatted date ranges, rather than manually entering one by using the settings described later. Example: Date Operations = Study Date Preformatted = Last 7 Days "If the study date falls within the last 7 days, display the study on the user's worklist"
Last/Next	Select a time range for the selected property. Example: Date Operations = Study Received Date Select Last, type 8, select Week(s) "If the study was received some time during the last 8 weeks, display the study on the user's worklist."
Date From / Date To	Select and enter a date range for the selected property.
From / To	Select and enter a time range for the selected property.

Limit access to patient information

You can limit the worklist to only display studies for patients who satisfy certain criteria.

1. In the left pane, select PATIENT INFORMATION.
2. Under Patient Name, select a logic option, type the exact portion of the patient name that corresponds to the selected logic option, and then select the plus + button to add the criterion.

3. Under Account No., perform the previous step as appropriate for the account number.
4. Select SAVE.

Limit access to study information

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

1. In the left pane, select STUDY INFORMATION.
2. For each criterion, select a logic option, and then type or select a value.
3. For example, to display only abdominal studies, under Body Part:
   - Select the Is option
   - In the list of body parts, select Abdomen
4. Select SAVE.

Limit access to information related to specific resources

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

1. In the left pane, select RESOURCE.
2. For each criterion, select a logic option, and then type or select a value.

   For example, to display only studies whose referring physician is *Jane Doe*, under Ref. Phys.:
   - Select the Is option
   - In the box, type JANE DOE, and then select the plus + button.
3. Select SAVE.

Limit access to information from specific insurance providers

You can limit the worklist to only display studies for patients who satisfy certain criteria.

1. In the left pane, select INSURANCE.
2. For each criterion, select a logic option, and then type or select a value. For example, to hide studies under litigation, under Insurance Provider Type:
   - Select the Is Not option
   - In the box, select Litigation, and then select the plus + button.
3. Select SAVE.

See also:

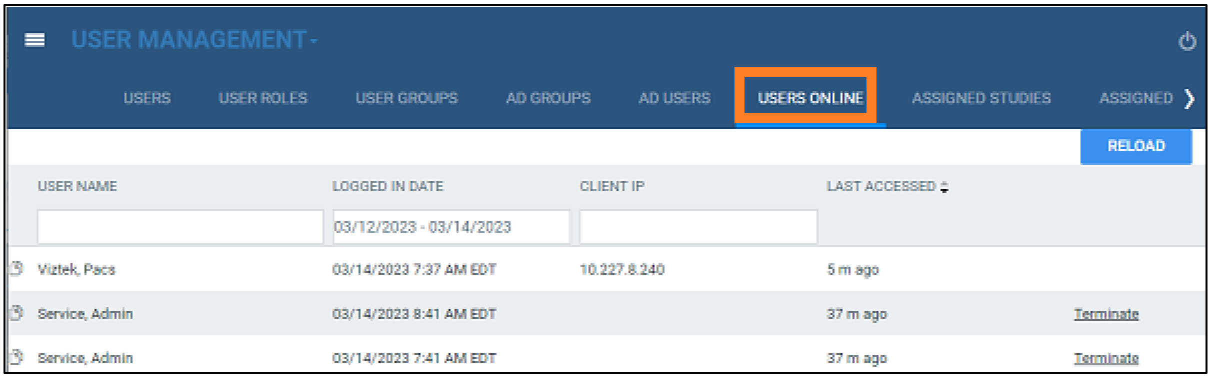
Create a user worklist filter

Manage who is online

Users with user management rights can view a list of users who are online, view a user's activity log, and terminate their session.

Procedure

1. Go to SETUP > OFFICE > User Management > USERS ONLINE.



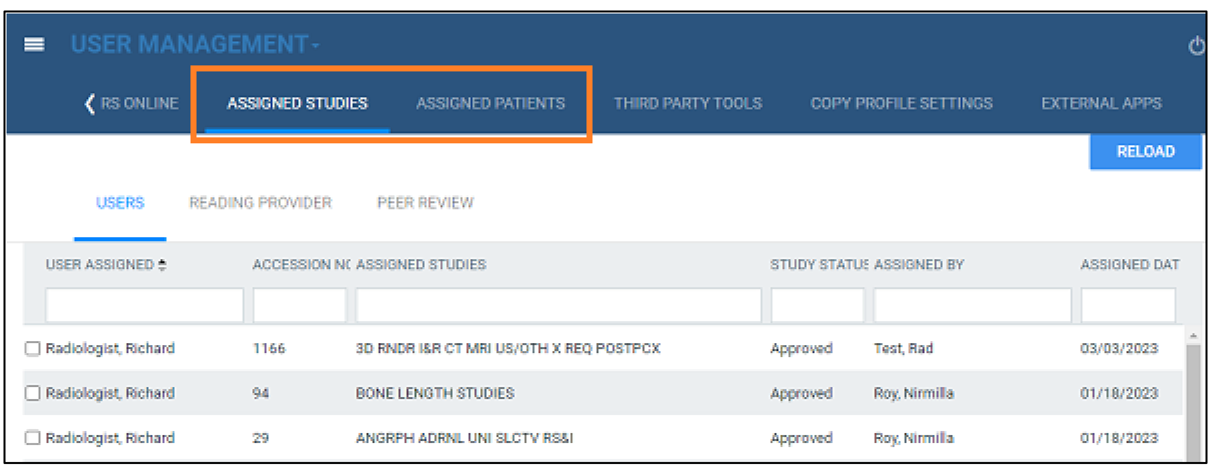
2. Optional: To view a session log for a user, select the log button.
3. Optional: To terminate a session, select the Terminate link.

View assigned studies and patients

You can view lists of studies and patients that are assigned to you (the current user).

Procedure

1. Go to SETUP > OFFICE > User Management.



2. Do one or both of the following.

- To view studies assigned to you, select the ASSIGNED STUDIES tab, and then select a sub-tab (such as Users or Reading Provider) to filter by user type.

- To view patients assigned to you, select the ASSIGNED PATIENTS tab. Patients can be assigned from the patient chart by using the Users Assigned dropdown list.

Configure general settings

You can set up study forms, custom forms, templates, and queues, and perform limited database queries.

This section contains the following topics (not all topics may be available depending on version and region).

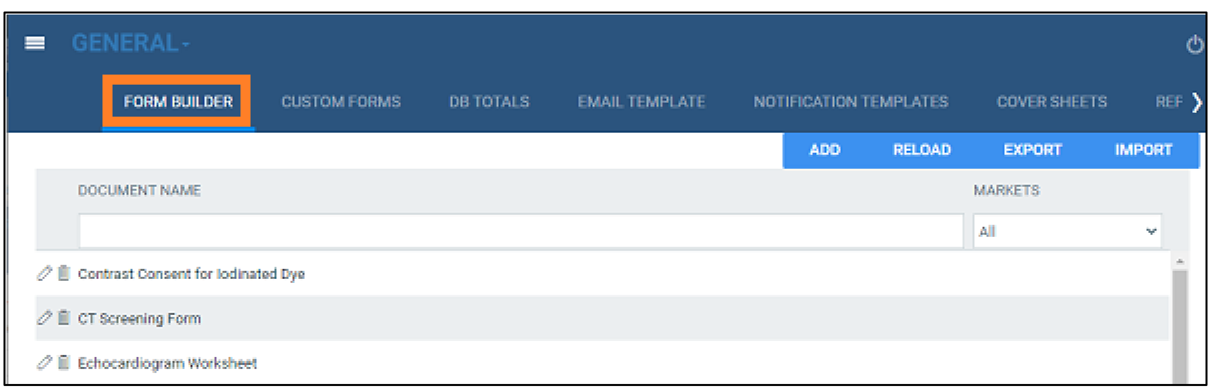
Create a study form

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.

Set up a study form

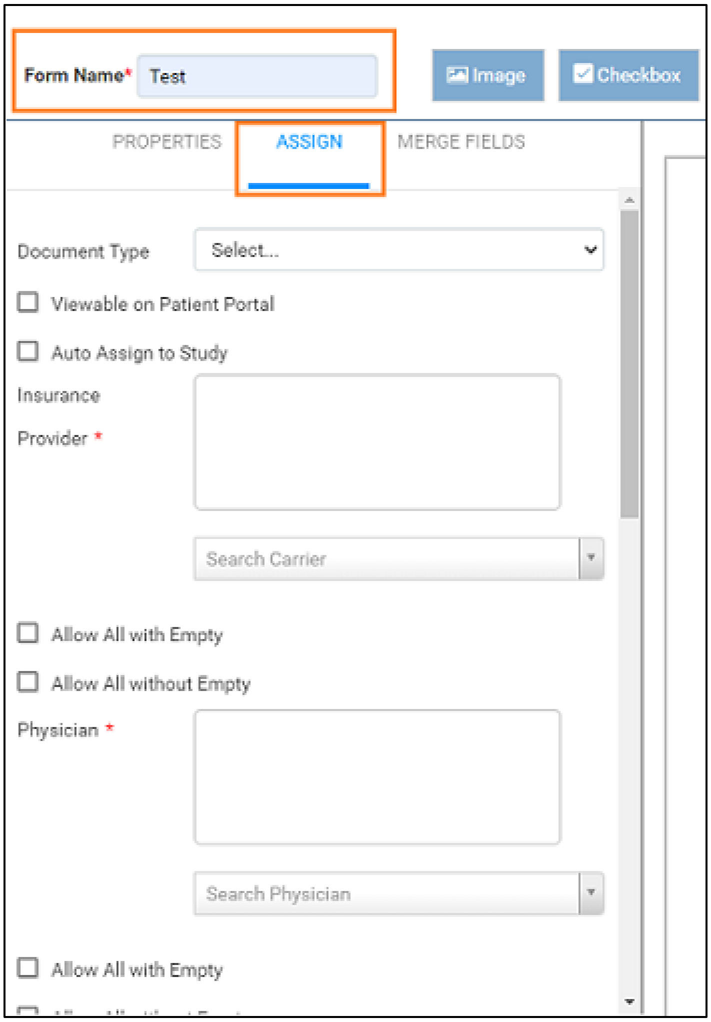
Use the following procedure to initially set up the form, and then see other topics to add and edit form contents.

1. Go to SETUP > OFFICE > General > FORM BUILDER.



2. Select ADD.

3. Type a Form Name, and then select the the ASSIGN sub-tab.



4. 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.
Auto Assign to Study	Select and then enter study criteria to automatically assign the form to those studies. 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	Select to restrict the form to studies with specific CPT codes. Select to make available for all CPT codes if none are specified.

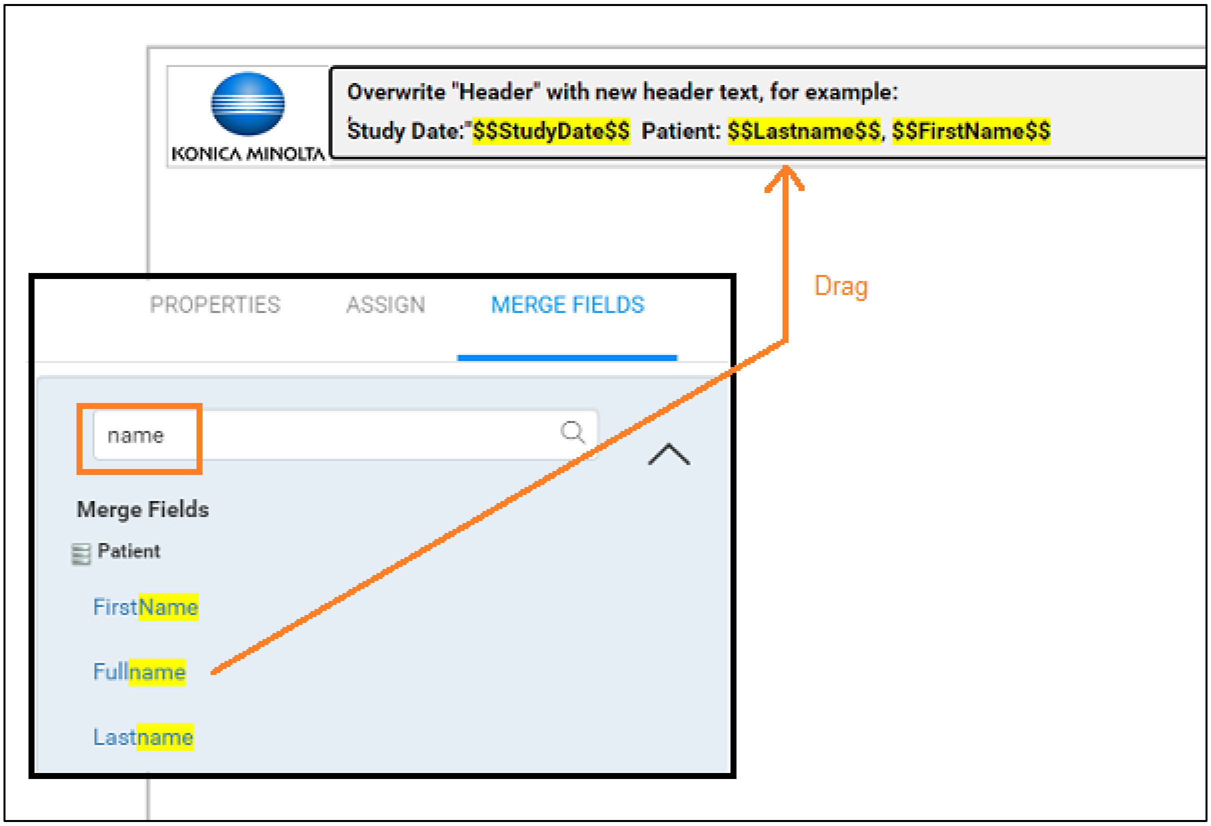
Allow All without Empty	Select to make the setting required.
ICD Codes Allow All with Empty Allow All without Empty	Select to restrict the form to studies with specific ICD codes. Select to make available for all ICD codes if none are specified. Select to make the setting required.
Markets	The form is 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.

5. 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 earlier steps to find and add a merge field for the patient name.

   Hint: Search for “name” rather than “patient.”

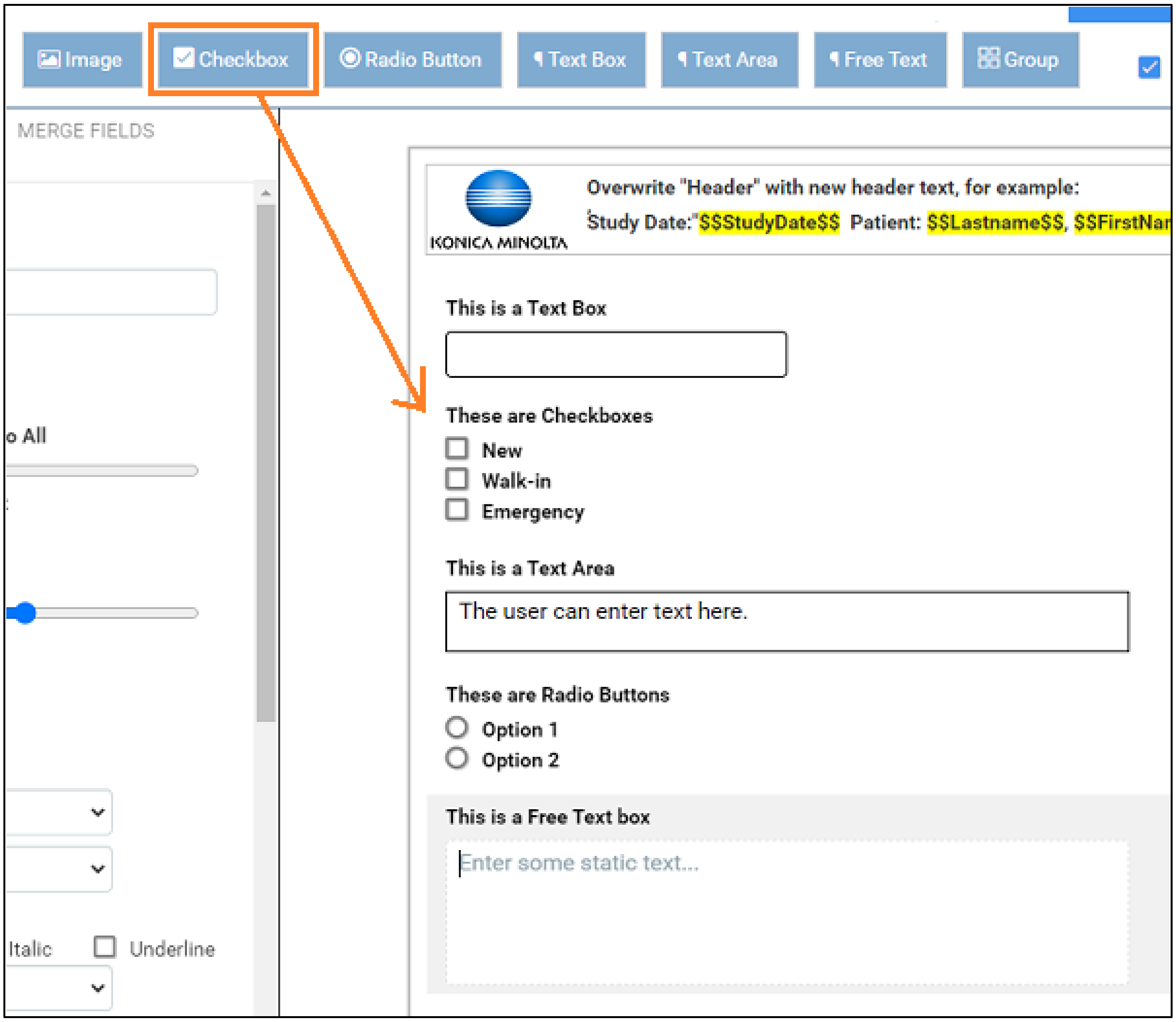
10. In the left pane, on the PROPERTIES tab, use the Spacing and Style controls to modify the layout.

11. Select Save.

    Your header could look something like the following.

Add text controls to a study form

Use controls to gather information from or provide information to the person filling out the form. To add a control, drag its button into the body of the form. To configure the control, select it and enter options in the left pane.



Text controls

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.

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

Add checkboxes for "multiple choice," but add options for "either/or" settings. You add an option group 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 replace 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.

See also:

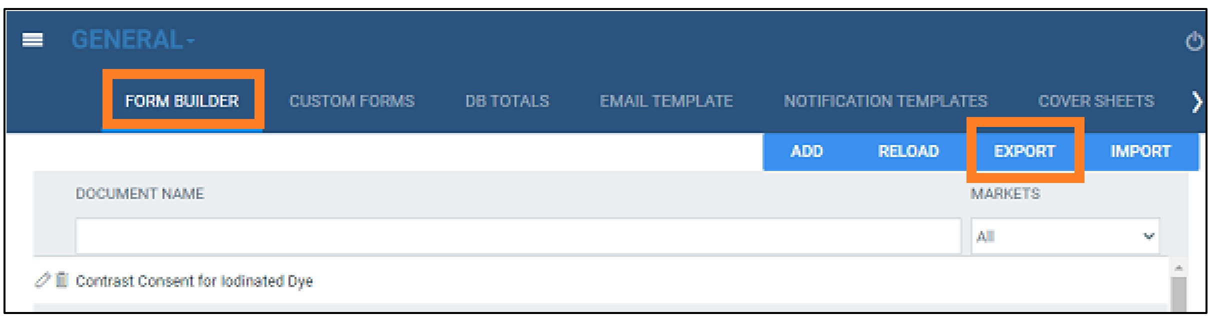
Add a study form to a patient record
Add a custom form to a patient record

Export and import a study form

To save time creating a study 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. Go to SETUP > OFFICE > General > FORM BUILDER > EXPORT.



Result: The form appears in the Windows Downloads folder as a JSON file.

2. Copy the JSON file to the computer at Facility A.

Import a study form

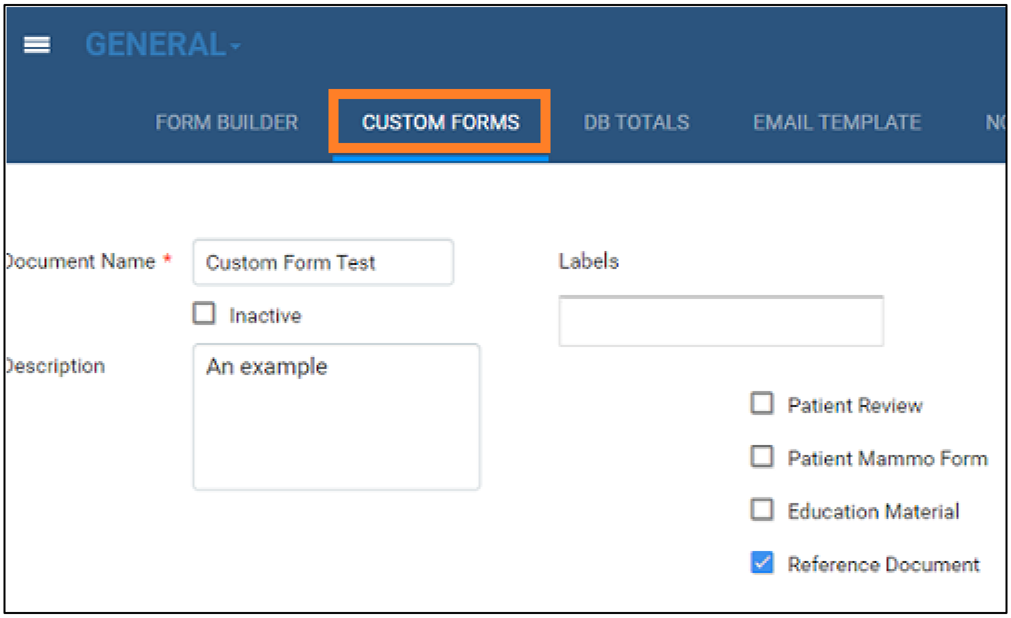
1. Go to SETUP > OFFICE > General > FORM BUILDER > IMPORT.
2. In the Import Study Forms dialog, select CHOOSE FILE, browse for and select the copied JSON file, and then select Open.
3. On the FORM BUILDER tab, find the new form and edit it for use at Facility A.

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

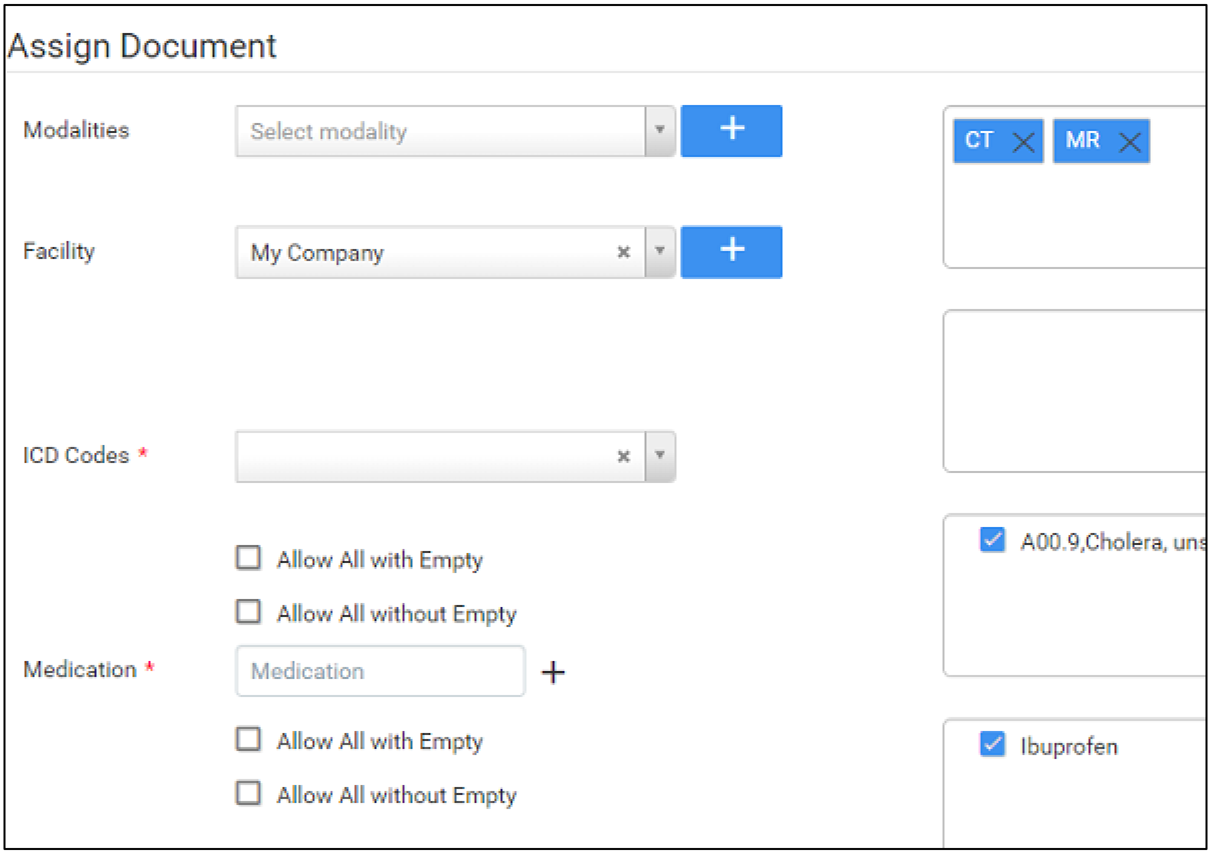
1. Go to SETUP > OFFICE > General > CUSTOM FORMS > ADD.



2. Enter the following settings.

Setting	Description
Document Name	Type a name for the form.
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.

3. Move down the page to Assign Document.



4. 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.

5. 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:

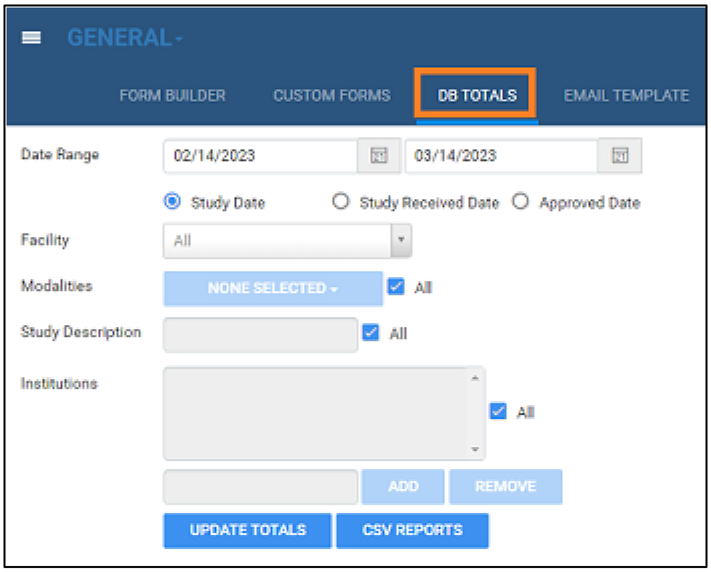
1. On the burger menu, select SETUP.
2. On the OFFICE menu, select General.
3. On the CUSTOM FORMS tab, select the form button of the custom form that you want to edit.
4. Edit the form as needed, and then select SAVE.

Perform a quick query of database totals

As an alternative to reports, you can quickly search 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.

Procedure

1. Go to SETUP > OFFICE > General > DB TOTALS.



2. 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.

3. To run the search, select UPDATE TOTALS.

4. The search results appear below the button under DB Details.

5. 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 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.

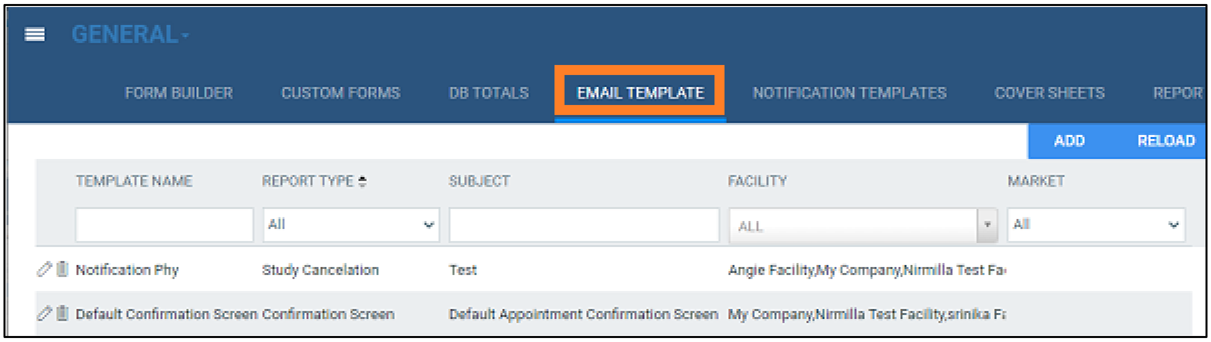
Feature	Auto-Sending of Media Based On:	
	Email Templates	Notification Templates
Where to configure template	Setup > [all caps button menu] > General > Email Template	Setup > [all caps button menu] > General > Notification Templates
Who can receive media	Referring provider locations/contacts, referring 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

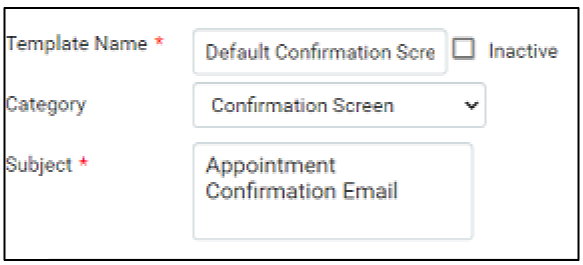
Follow the steps in this topic to configure an email template. To use the template to auto-send emails and other media, see Set up emailing of exam results.

Procedure

1. Go to SETUP > OFFICE > General > EMAIL TEMPLATE.



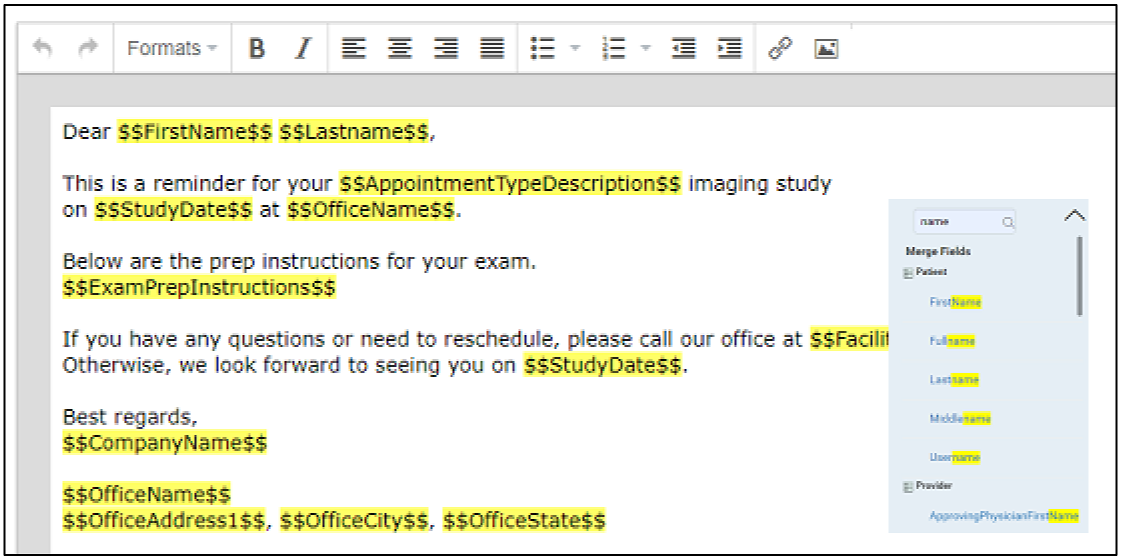
2. Select ADD.



3. 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 selected 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. FirstName).

6. Select SAVE.

See also:

About email templates and notification templates

Set up emailing of results and reports

By completing the following tasks, Symmetry PACS automatically sends exam results, approved reports, and appointment confirmations to the referring provider locations/contacts you modify.

Prerequisite: Administrators must configure the company's "Email information" (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:

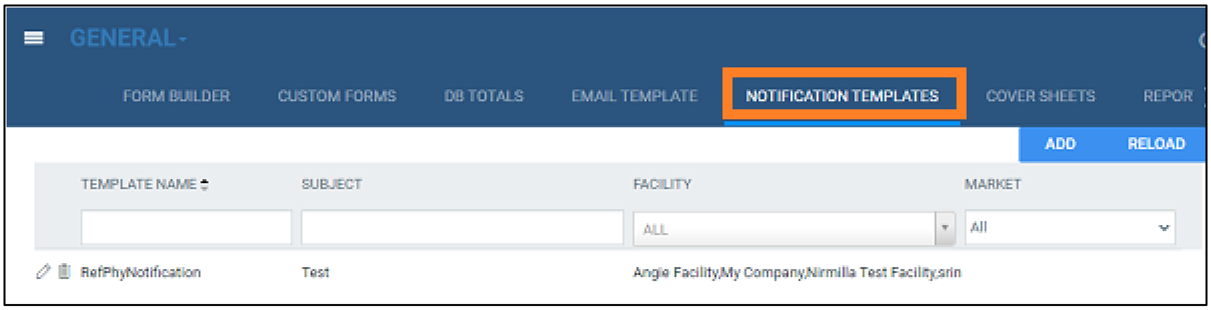
[About email templates and notification templates](#)

Configure a notification template

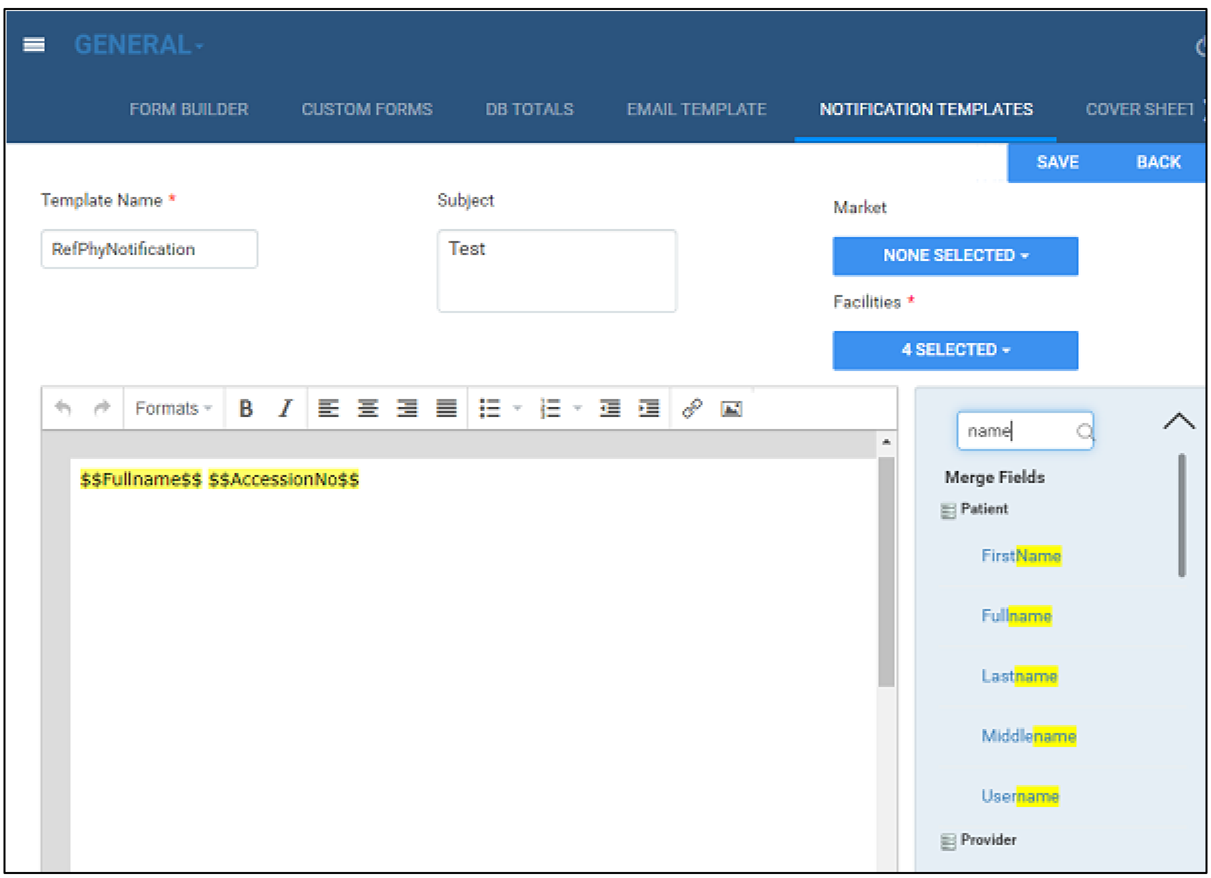
Follow the steps in this topic to configure a notification template. To use the template to auto-send status change emails or faxes, see Set up sending of notifications.

Procedure

1. Go to SETUP > OFFICE > General > NOTIFICATION TEMPLATES.



2. Select ADD.



3. 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 selected 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 information" (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:

Procedure

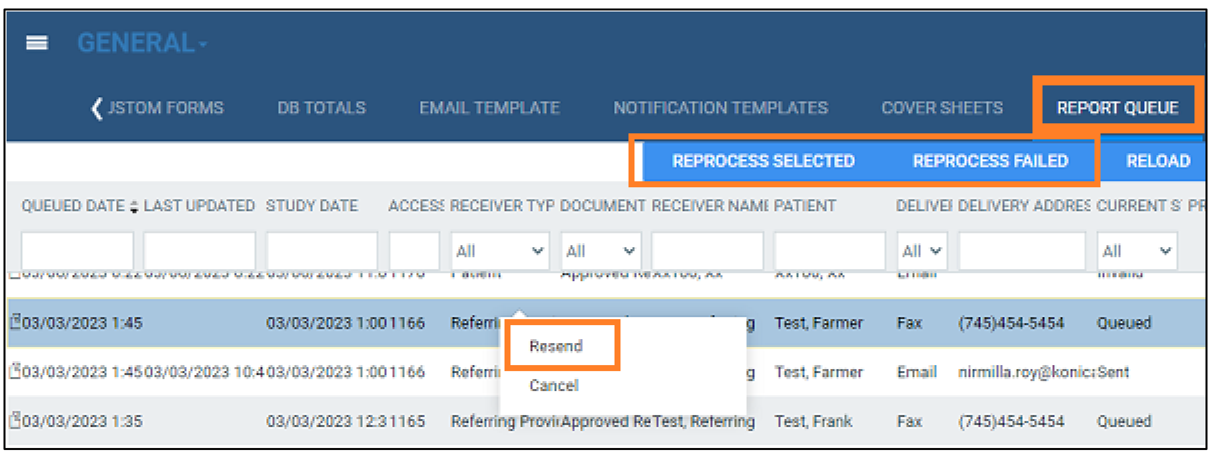
1. Go to SETUP > OFFICE > General > COVER SHEETS tab, select ADD.
2. Type a name for your cover sheet, select the facility where the cover sheet will be available, and then select SAVE.
3. Use the word processing tools create your cover sheet, and then select SAVE.
4. Select SAVE & CLOSE.

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.

Procedure

1. Go to SETUP > OFFICE > General > REPORT QUEUE.



2. To resend a report, right-click it in the list and then select Resend.
3. To resend a batch of reports, at the top of the list, select REPROCESS SELECTED or REPROCESS FAILED.
4. To resend a report automatically at a later time, right-click it in the list and then select Requeue.

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. There are two ways to open the Viewer Settings dialog.

- In the Symmetry PACS viewer, in the upper toolbar, select the setting button.

- In the worklist, on the upper toolbar, select the settings button, and then in the button shortcut menu, select Viewer Settings.

This section contains the following topics (not all topics may be available depending on version and region).

Set up connected displays
Configure autosave options
Configure the toolbar
Configure calipers
Configure other interface settings
Configure annotation tool functionality
Configure annotation colors
Configure annotation size and scaling
Configure recording
Show or hide tool buttons
Configure fusion
Configure modality-specific viewing options
Configure overlays
Add or remove toolbar tools
Add or remove tools from the image shortcut menu
Assign toolbar keyboard shortcuts
Assign keyboard shortcuts for Exa Trans

Set up connected displays

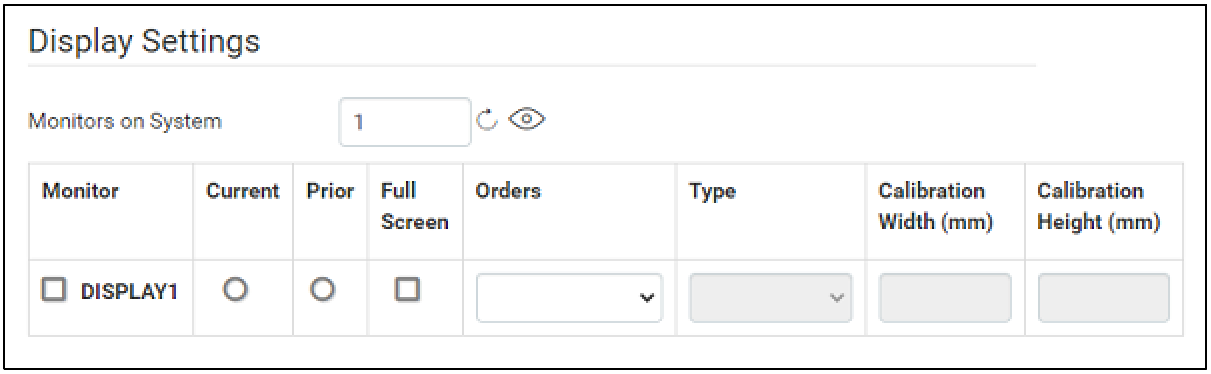
Configure all connected monitors that you intend to use with Symmetry PACS. These settings act as default behavior for what study items open in which monitor. If DMs conflict with the settings you enter here, the DM takes precedence.

Prerequisite: Add the Chrome extension.

Procedure

1. Go to Viewer Settings > GENERAL.

2. 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.



3. 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 screen of the program to open in the monitor when manually opening it with a viewer tool, or when configured to open automatically. Documents: Opens the document list when you select the D button in the viewer, or when Auto Open Documents is enabled. Notes: Opens the Notes screen. Transcription: Opens the Transcription screen (Exa Trans, Web Trans, or other). Other: Select other screens in the list. To make options available, select them in the Auto Open Orders list (see Configure other interface settings).
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)

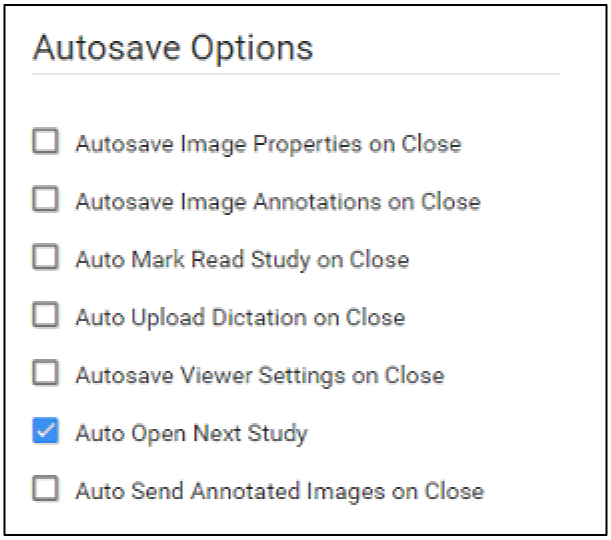
4. Select SAVE.

Configure autosave options

You can configure how the viewer performs automatic saving and other functions.

Procedure

1. Go to Viewer Settings > GENERAL.



2. 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. If Exa Dictation is in use and the workflow includes dictation and transcription, this option is disabled.
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.
Auto Send Annotated Images on Close	Automatically sends images if they include annotations when the current study is closed.

3. Select SAVE.

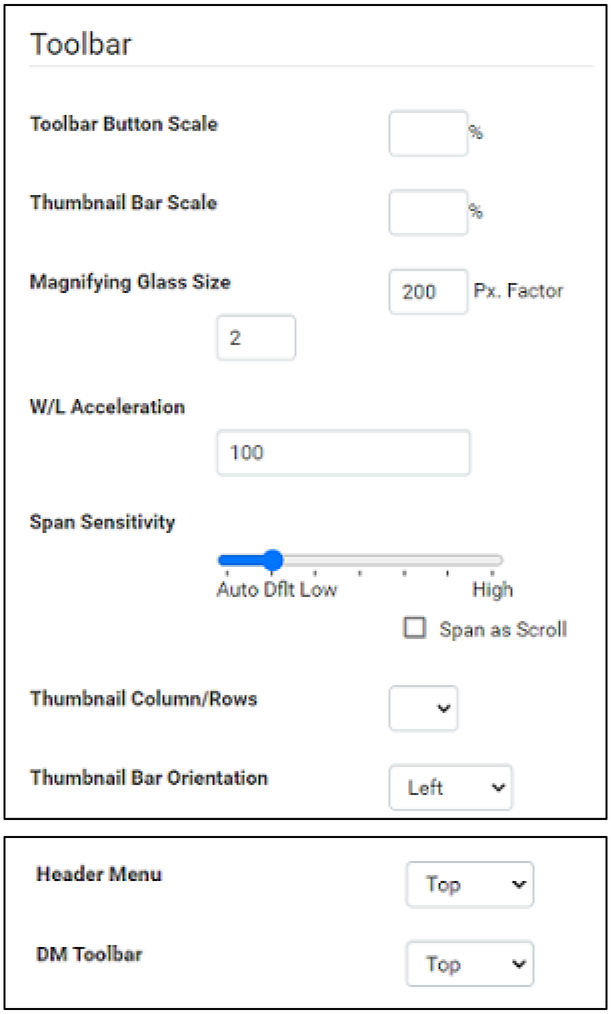
Configure the toolbar

You can configure the appearance and other properties of the viewer toolbar. To configure specific toolbar buttons, see Add or remove toolbar tools.

Procedure

1. Go to Viewer Settings > INTERFACE.

2. Under Toolbar, enter settings described in the table below.



Note: You may need to refresh the browser or viewer for changes to take effect.

Setting	Description
Toolbar Button Scale	Adjusts the size of toolbar buttons as a percentage of the screen resolution.
Thumbnail Bar Scale	Adjusts the size of the thumbnail bar.
Magnifying Glass Size	Adjusts the size of the area affected by the magnifying glass, and the pixel magnification factor (the single digit in the text box).
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.

Setting	Description
	Span as Scroll - Spans in correlation with the scroll bar. For example, if the series has 400 images, you can drag from the middle to the bottom of the frame on image 1 to span from 1 to 200.
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.

3. Select SAVE.

See also:

Configure other interface settings

Configure calipers

You can configure the number and placement of calipers.

Procedure

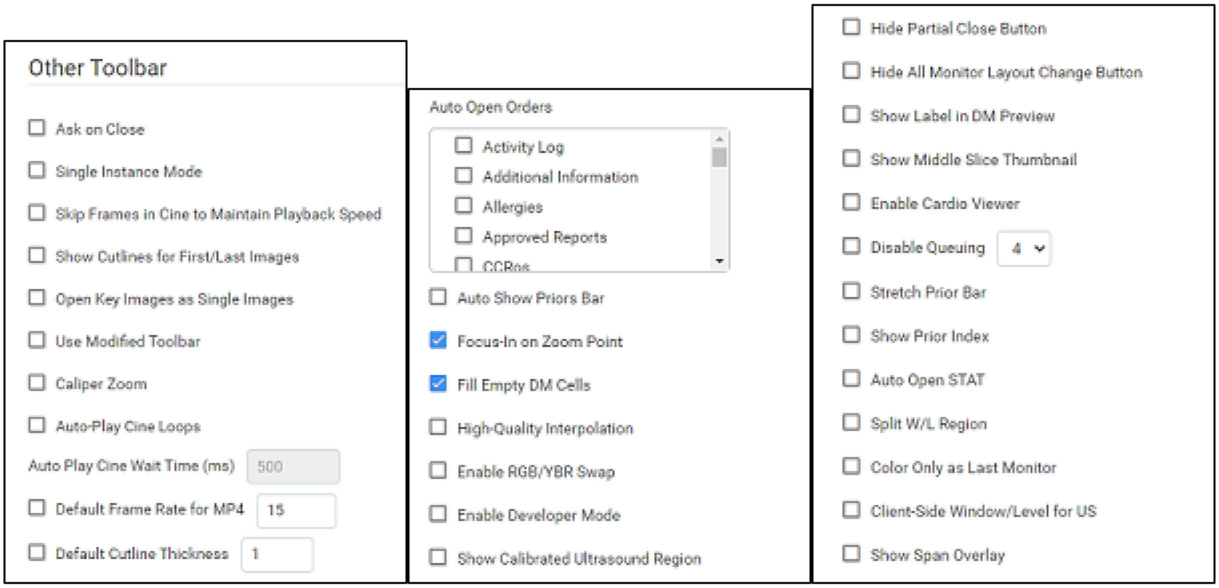
1. Go to Viewer Settings > INTERFACE.
2. Under Caliper Position, select checkboxes for each caliper that you want to display, and then select SAVE.

Configure other interface settings

You can configure miscellaneous viewer toolbar and other settings.

Procedure

1. Go to Viewer Settings > INTERFACE.
2. Under Other Toolbar, enter the settings in table below.



Top... ...middle... ...bottom

Setting	Description
Ask on Close	Prompts you to specify which items to save before closing the viewer, related to the Autosave options.
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. Helpful with slower computers or video cards.
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 Viewer Settings > General > 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 the next available 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 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. Corrects Red/Blue color reversal errors in venous US and other color-based modalities.
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	Select to force synchronous communication; client message and server response occur one at a time. Clear to allow multiple simultaneous requests for images, and use the dropdown to select the number of requests. Can improve performance on large CT, X-ray DDR, and MG Tomo series. 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.
Show Span Overlay	Shows a span sensitivity adjustment slider on images.

3. Select SAVE.

See also:

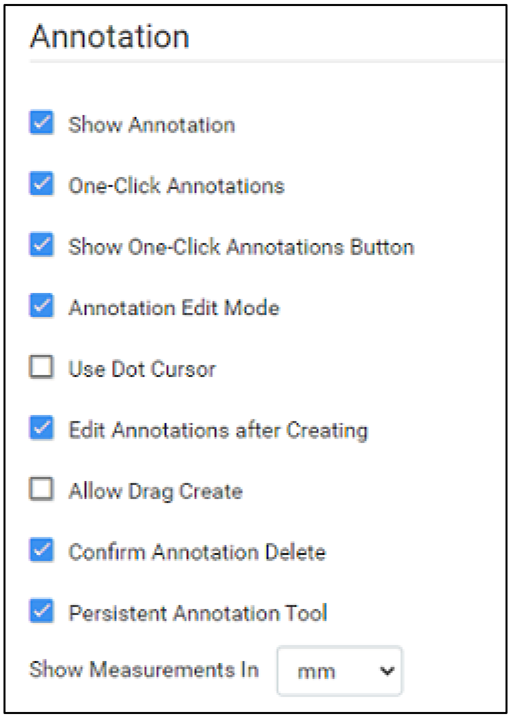
[Configure the toolbar](#)

Configure annotation tool functionality

You can configure annotation tool functionality.

Procedure

1. Go to Viewer Settings > INTERFACE.
2. Under Annotation, enter the settings in the table below.



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, to move, resize, or delete annotations.
Use Dot Cursor	Changes the standard arrow 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.
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.

Setting	Description
Show Measurements In	Sets the units for any length measurements taken.

3. Select SAVE.

Configure annotation colors

You can configure the color of annotations to indicate whether they are selected, in edit mode, or applied.

Procedure

1. Go to Viewer Settings > INTERFACE.
2. 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.

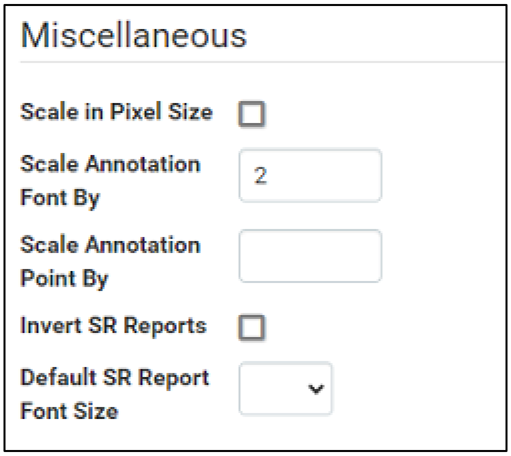
3. Select SAVE.

Configure annotation size and scaling

You can configure the pixel or font size of annotations, and scale annotation points.

Procedure

1. Go to [Viewer Settings](#) > [INTERFACE](#).
2. Under Miscellaneous, enter the settings in the table below.



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 Pixel Size ON: Default is approximately 10 Scale Pixel Size OFF: Default is approximately 1 to 1.5
Scale Annotation Point By	Sets the size of annotation handles (from 0.1 to 5).
Invert SR Reports	If an SR appears within a cell, displays it in reverse video (such as white text on black background).
Default SR Report Font Size	Sets the default font size for text in SR reports that appear within a cell.

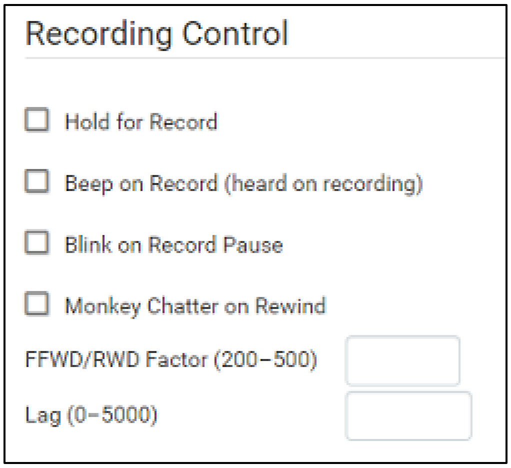
3. Select SAVE.

Configure recording

You can configure audio recording options for Exa Dictation.

Procedure

1. Go to [Viewer Settings](#) > [INTERFACE](#).
2. Under Record Control, enter the settings in the table below.



Setting	Description
Hold for Record	Requires you to hold down the button for the duration of recording.
Beep on Record	Beeps when recording starts. The beep may be audible on resultant recordings.
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.

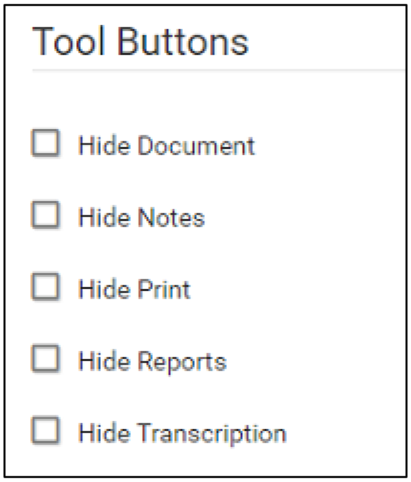
3. Select SAVE.

Show or hide tool buttons

You can hide certain tool buttons.

Procedure

1. Go to Viewer Settings > INTERFACE.
2. Under Tool Buttons, select the checkboxes of the items that you want to hide.



3. Select SAVE.

Configure fusion

You can configure options for fusion.

1. Go to Viewer Settings > INTERFACE.

3. Under Fusion, enter the settings in the table below.

Group	Setting	Description
Fusion	Auto Adjust for CT/PT Frame Count Mismatch	Select to reconstruct PET anatomy on fusion overlays between absent slices. Disable to display PET overlays only for slices originally included in the PT series.

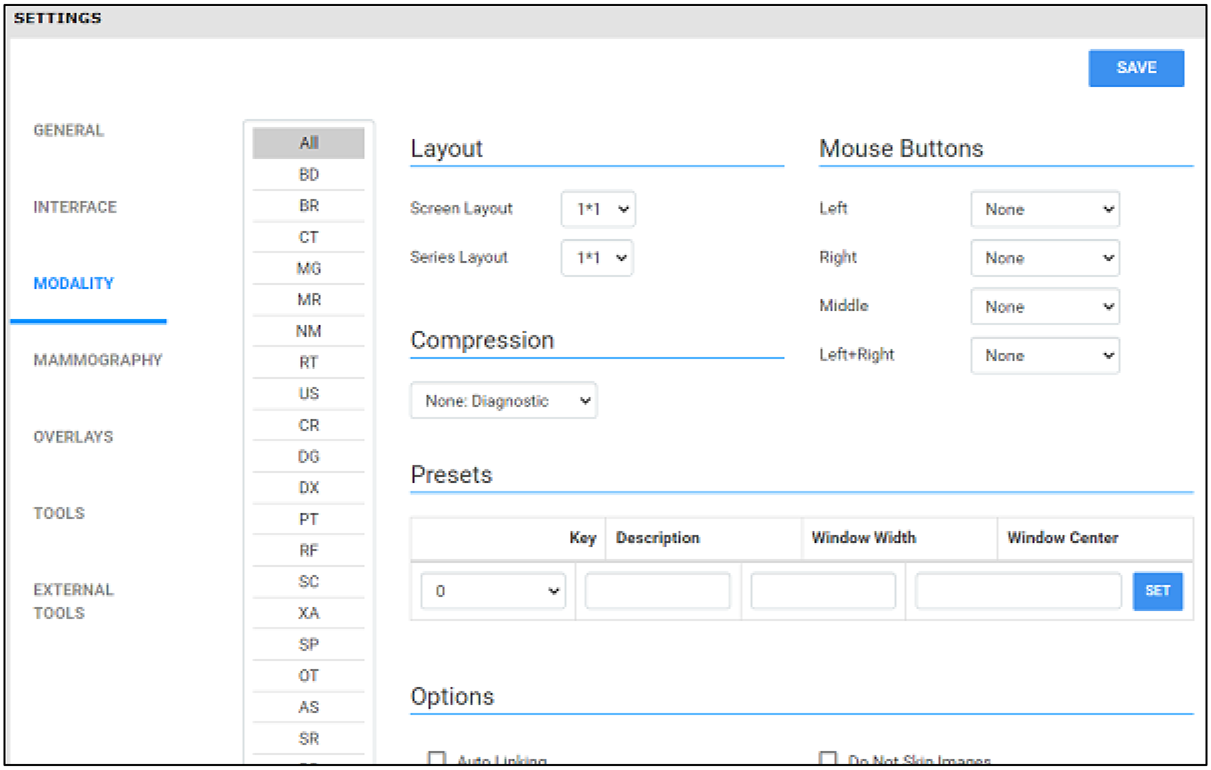
4. Select SAVE.

Configure modality-specific viewing options

You can configure how studies appear in the viewer for all modalities, or for each specific modality.

Procedure

1. Go to Viewer Settings > MODALITY.



2. In the list of modalities, select a modality to configure.

3. Enter the settings in the following table.

Section	Setting	Description
Layout	Screen Layout	Changes the number and layout of series frames.
	Series Layout	Changes the number and layout of image frames within series 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	Automatically numerically links the current series projection (Sagittal, Coronal, and Axial) with all other like series projections in that study.
	Assume Color Study	Forces studies of the selected modality to appear in the default color monitor set in the display settings regardless of color.

Section	Setting	Description
	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	Automatically applies CLAHE, enhancing image contrast.
	Auto Hang DM	Enables the use of DMs. Makes the first instance on the DM preview available to hang on the viewer.
	Auto DM Wrap	Enables moving from the final step of a DM directly to the first step, and back again.
	Auto Hang Priors	Automatically loads the first prior when the viewer opens. Works in conjunction with Auto Open Priors.
	Auto Replace Priors	Automatically replaces prior images in the current layout.
	Auto-Invert SC Images	Inverts white and black of scanned documents such as prior 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. This setting also applies to synthesized mammogram views, in which the cutlines indicate the position of the currently viewed image on the corresponding BTO view.
	Auto Show Cine	Shows the media control bar when a series is opened.
	Auto Show W/L Bar	Shows the window/level bar when the viewer opens.
	Detect Pixel Padding	Turns detection of pixel padding ON/OFF.
	DM Allow Missing Cell	Shows a blank cell in the DM if the assigned image is not available.
	DM Save W/L	Saves the window/level with the DM.
	Save Study DM on Close	Creates a new DM for each study when it closes, or when the next study auto-opens. The DM is named with the accession number, and contains the last displayed stack and monitor position.

Section	Setting	Description
	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	Select to show each image with its own W/L. Clear to show each image with the W/L of the first instance.
	Do Not Skip Images	Prevents moving 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.
	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 (sharp mask) 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 of acquisition.
	Stop Thumbnail from Updating	Prevents W/L changes to the current image from affecting its thumbnail.

Section	Setting	Description
	Stretch Across Monitors	Turns on extending of images across all active monitors.
	Cine Direction	Sets the cine playback to forward or backward.
	Default FPS	Causes cine play to occur at the default frames per second, depending on modality.
	Enable 4DM	Opens the 4DM viewer for post-processing. (Requires configuration to integrate with the 4DM viewer.)
	Disable CINE Scrolling	Disables cine play of series.
	Active Frame Based Cineplay	Playing a cine loop on one series automatically plays all linked series.
	Disable Caliper on Cine	Hides calipers during cine playback.
Auto-Split Rules	Always	Splits US series into individual images.
	Differing Echo Time	Splits by echo time.
	Differing Series Number	Splits by series number.
	Differing Series Time	Splits by series time.
	Differing Acquisition Number	Splits by acquisition number to create stacks for separate acquisitions/scans.
	Differing Diffusion Value	Splits images within similar series UID by b-value (0018,9087 MR Diffusion Value) into separate series.
	Differing Trigger Time	Splits by trigger time (0018,1060).
	Isolate MPEG	Splits by MPEG file.
	Isolate Multiframe	Splits cine loops into multiple images.
Auto Bone Enhance		Highlights the bone portions of images by the percentage you type.
Auto WL Type		Selects which W/L to use (such as when values are not available from the modality). Normal: Use the W/L tags from the modality, if available. Raw Img: Ignore W/L tags and allow the viewer to auto-contrast the image. Full: Allows full range of W/L by bit depth: 8 bit = 256, 10 bit = 1024, 12 bit = 4096
Auto Reorder Images		Automatically changes the order of images in a series to the selected order. Image Number: Displays images by DICOM instance number, lowest to highest. Image Number Reverse: Displays images by DICOM instance number, highest to lowest. Slice Location: Displays images by DICOM slice location, lowest to highest. Slice Location Reverse: Displays images by DICOM slice location, highest to lowest.

Section	Setting	Description
		Image Time: Displays images by DICOM acquisition time, lowest to highest.
Prior Options	Auto Open Prior	Automatically opens prior studies.
	Relevant Priors	When automatically opening priors, also opens relevant priors from other modalities. See “Define relevant priors” later in this topic.
	Auto Open Prior Count	When automatically opening priors, opens the selected number of studies.
	Force Relevant Only	Opens only the defined relevant priors (see "Define relevant priors" later in this topic).
	Prioritize Current Modality First	When opening relevant priors, display same-modality priors first.

4. Select SAVE.

5. Optional. If you selected Relevant Priors, continue to “Define relevant priors.”

Define relevant priors

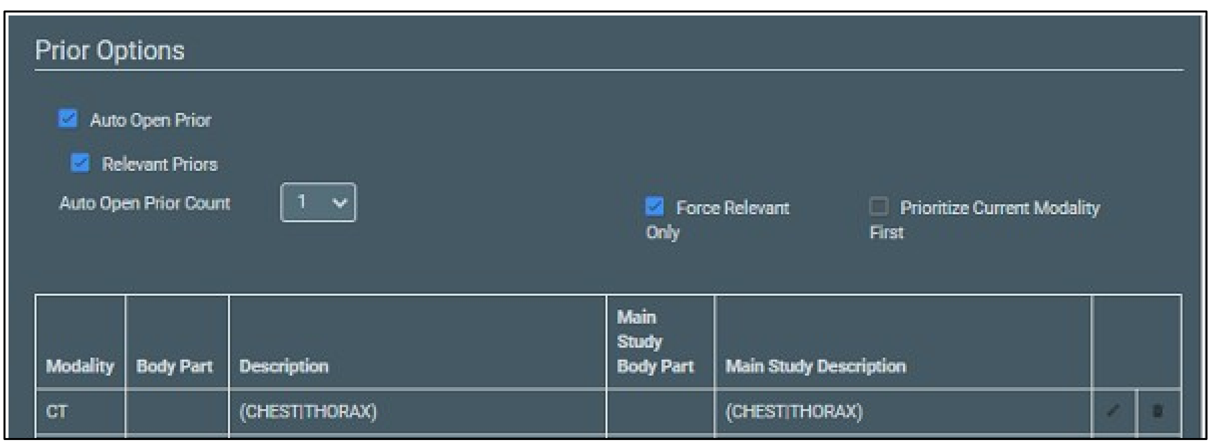
Defining relevant priors allows you to auto-open only priors that are relevant to the current study based on study description, modality, or body part. To write definitions for which priors are relevant you use a syntax called *relevant prior logic:*

```
STRING or (STRING|STRING|...){.*(STRING|STRING|...)}
```

"A single string, or multiple strings delimited with a bar, optionally followed by ".*" plus multiple strings delimited with a bar."

Example 1

When the main study description contains "CHEST" or "THORAX," the relevant priors to auto-open are CT studies whose descriptions also contain "CHEST" or "THORAX."



Prior settings on the left... ...main study settings on the right

Example 2

- When the main study description contains "CLAVICLE," SCAPULA," or "SHOULDER" followed by "LEFT," "LT," or "BI," the relevant priors to auto-open are those whose descriptions also match those criteria.
- The same is true for the RIGHT shoulder.
- Priors of the same modality as the main study are opened first.

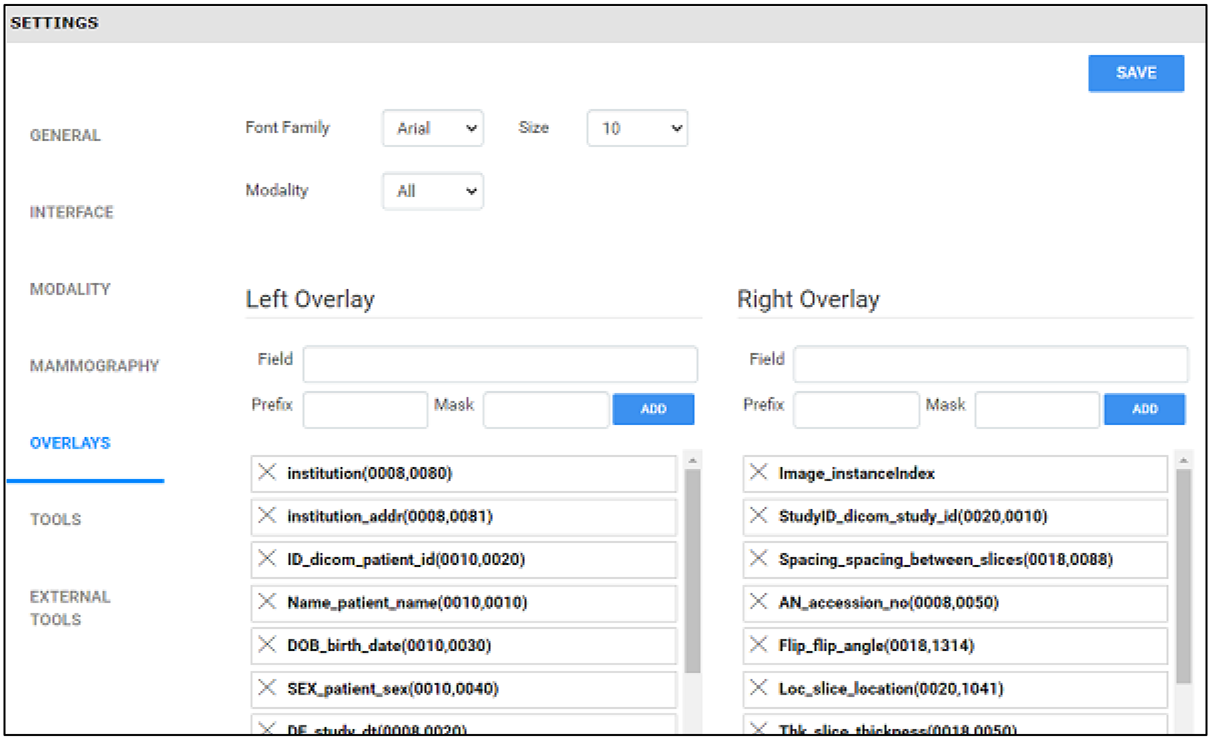
Note: You can also define relevant priors to auto-send (see Configure routing rules).

Configure overlays

You can configure the appearance and contents of overlays.

Procedure

1. Go to Viewer Settings > OVERLAYS.



2. 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. You can use an intuitive prefix such as Series #, DOB, or Time.
	Mask	Optional. Type attributes that describe mask operations for a multi-frame image (see the DICOM standard).
Bottom Overlay	FOV/MAG/W/L	Displays the field of view, magnification, and W/L for each series in the bottom corner.

3. Select ADD

   Result: The tag appears at the bottom of the list.

4. Optional. Drag the tag to a new position in the list.

5. Select SAVE.

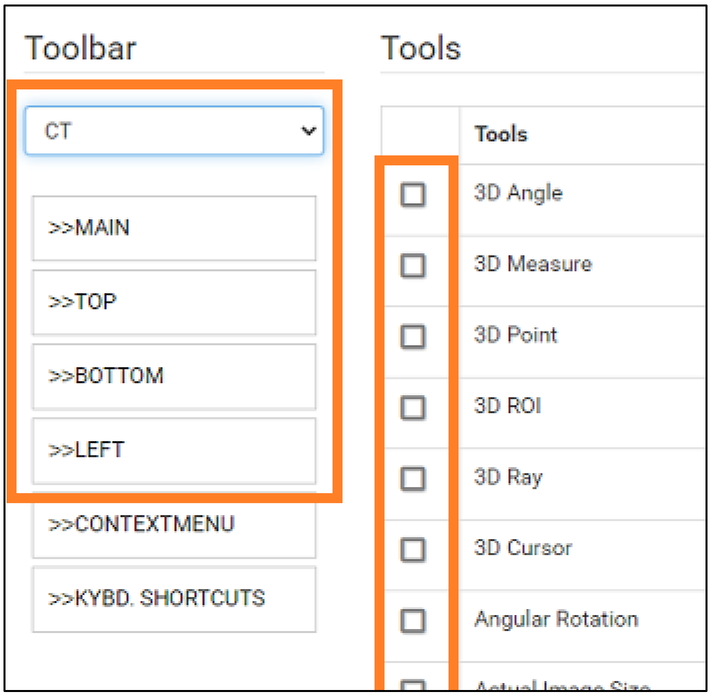
Add or remove toolbar tools

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.

Procedure

1. Go to Viewer Settings > TOOLS.
2. Under Toolbar, select the modality whose toolbar you want to customize.



IMPORTANT: The Toolbar All setting only defines the default tool settings. If any modality-specific tools were configured, they override the default. Therefore we recommend configuring each modality you plan to use (such as "CT" in the figure above).

3. 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.

4. Under Tools, select or clear the checkboxes of the tools that you want to add or remove.
5. Select SAVE.

See also:

Add or remove tools from the image shortcut menu

Assign toolbar keyboard shortcuts

Assign keyboard shortcuts for Exa Trans

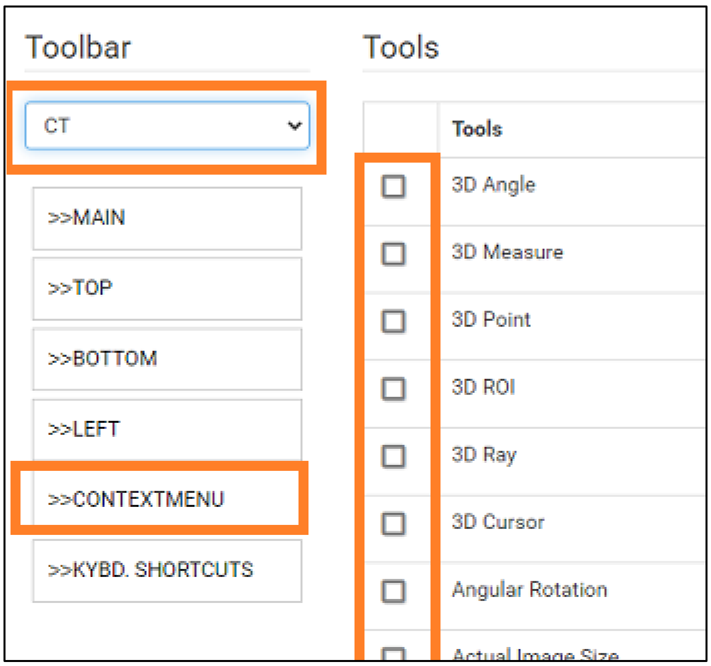
Viewer tools and keyboard shortcuts

Add or remove tools from the image shortcut menu

You can add or remove tools from the shortcut (context) menu that appears when you right-click an image, and customize your choices by modality.

Procedure

1. Go to Viewer Settings > TOOLS.
2. Under Toolbar, select the modality whose shortcut menu you want to customize.



3. In the list, select CONTEXT MENU.
4. Under Tools, select or clear the checkboxes for tools that you want to add or remove.
5. Select SAVE.

See also:

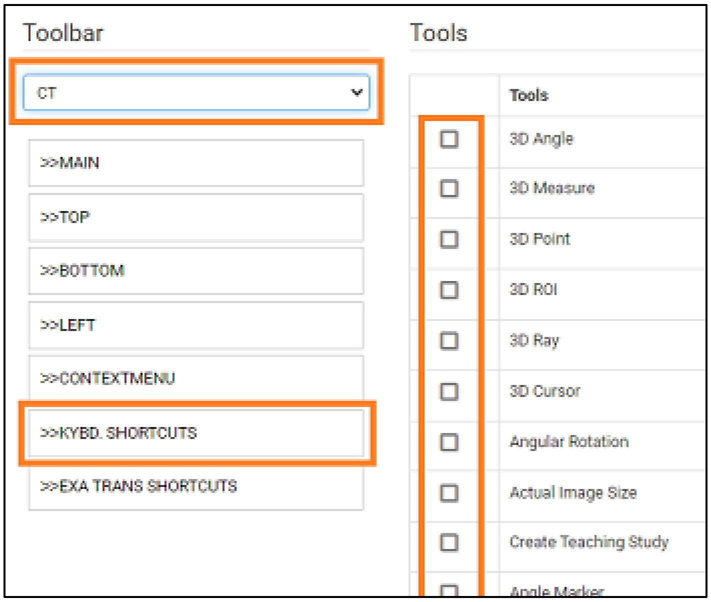
Add or remove toolbar tools
Assign toolbar keyboard shortcuts
Assign keyboard shortcuts for Exa Trans
Viewer tools and keyboard shortcuts

Assign toolbar keyboard shortcuts

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

Procedure

1. Go to Viewer Settings > TOOLS.
2. Under Toolbar, select the modality for which you want to assign shortcuts.



3. In the list, select KEYBOARD SHORTCUTS.
4. Under Tools, select the checkboxes of the tools to which you want to assign shortcuts.
5. 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 (+, -, *, /)
6. Select SAVE.

See also:

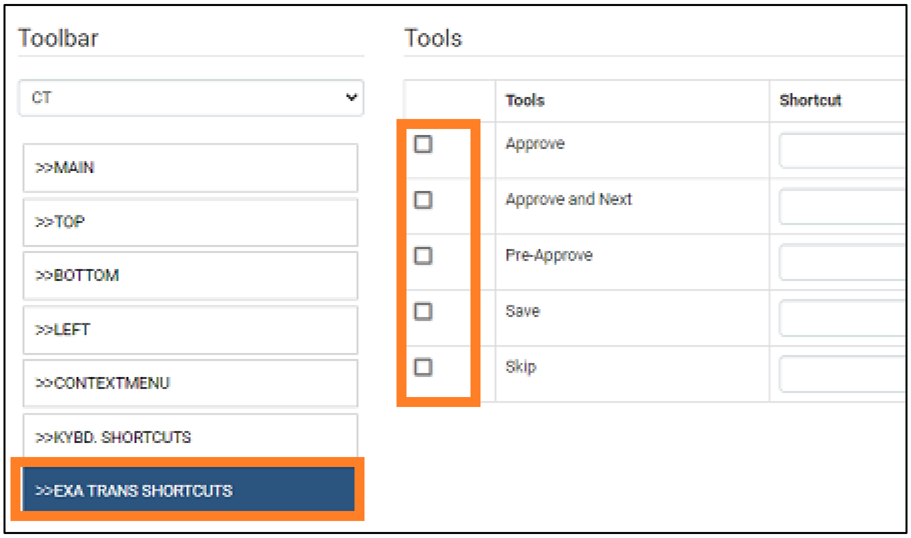
Add or remove toolbar tools
Add or remove tools from the image shortcut menu
Assign keyboard shortcuts for Exa Trans
Viewer tools and keyboard shortcuts

Assign keyboard shortcuts for Exa Trans

You can assign keyboard shortcuts ("hot keys") to common functions in Exa Trans. To use a keyboard shortcut that you assign here, Exa Trans must be the active application. For built-in keyboard shortcuts, see Keyboard shortcuts and commands for Exa Trans.

Procedure

1. Go to Viewer Settings > TOOLS.
2. Under Toolbar, In the list, select EXA TRANS SHORTCUTS.



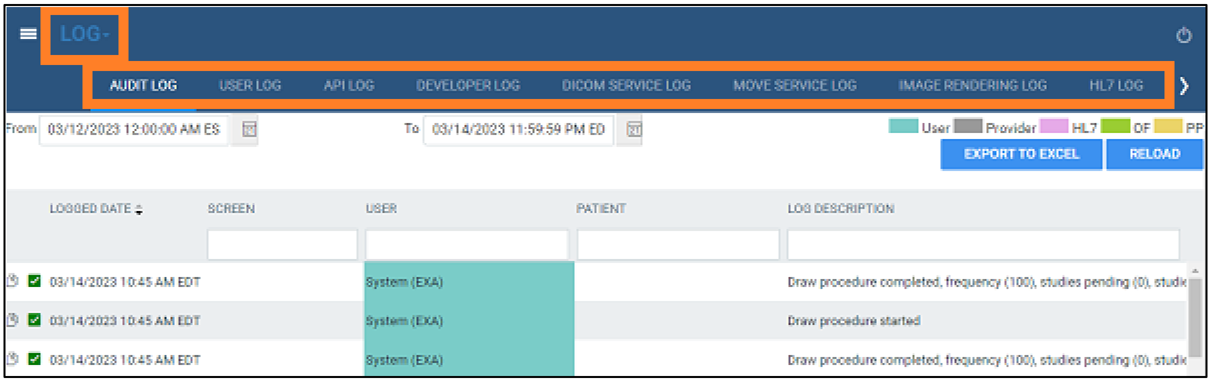
3. Under Tools, select the checkboxes of the tools to which you want to assign shortcuts.
4. In the Shortcut box, type the keyboard shortcut. The shortcut can be one of the following, either by itself or preceded by the Ctrl key:
   - Alphanumeric character (A–Z, a–z, 0–9)
   - Arrow key (Up, Down, Left, or Right)
   - Basic math operator (+, -, *, /)
5. Select SAVE.

View logs

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

Procedure

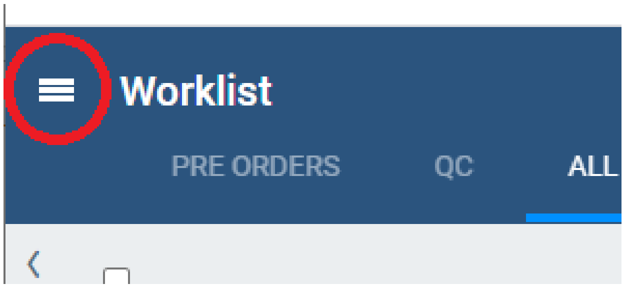
1. Go to SETUP > OFFICE > Log.
2. Select tabs (AUDIT LOG, USER LOG, etc.) to view different logs.

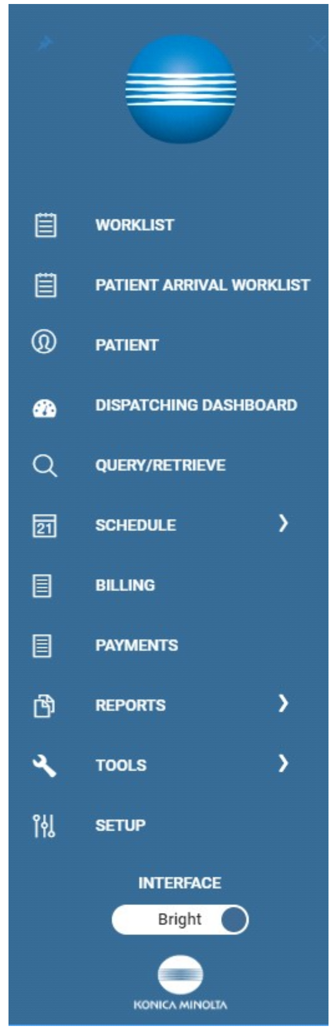


3. Double-click entries to view details.

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 dashboard

What is the dashboard?

The dashboard is a page that displays *gadgets*, which contain information in graph, table, and other formats to help you understand the status of work at your facility. The dashboard is separate from the dispatching dashboard, which is dedicated to Mobile Radiology.

This section contains the following topics (not all topics may be available depending on version and region).

Open the dashboard

- On the burger menu, select DASHBOARD.

Add or remove gadgets from the dashboard

The dashboard displays an array of user-customizable *gadgets*, and a gadget with a button for adding more gadgets.

Procedure

1. On the burger menu, select DASHBOARD.
2. To remove a gadget, select its remove button.
3. To add a gadget, find Add Gadget and select its add button.
4. In the list of gadget types, select a type.

Change the graph type of a gadget

You can select a graph type of bar, column, line, or pie.

Procedure

1. On the burger menu, select DASHBOARD.
2. On a gadget, select the graph button.
3. In the button shortcut menu, select a type.

Change the facility of a graph

You can change the source facility of the graph in a gadget. The available facilities are ones that you set up in advance in Symmetry PACS.

Procedure

1. On the burger menu, select DASHBOARD.
2. On a gadget, select the facility button.
3. In the button shortcut menu, select a facility or select All Facilities.

Change the date range of a graph

You can change the date range of the data source of the graph in a gadget.

Procedure

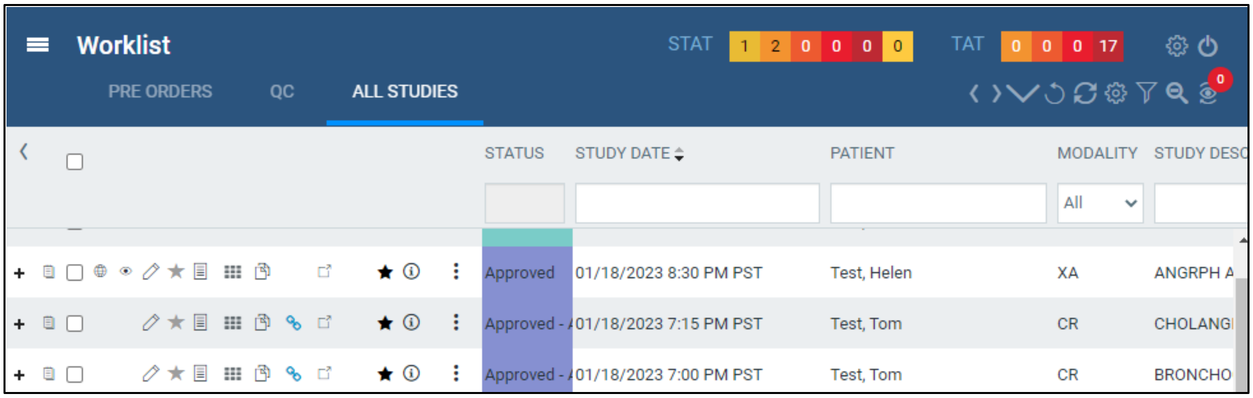
1. On the burger menu, select DASHBOARD.
2. On a gadget, select the date range button.
3. In the button shortcut menu, select a date range and then select Apply.

Work with the worklist

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

Procedure

1. Go to burger menu  > WORKLIST.



See also in this chapter:

Worklist settings
User settings
Viewer settings
Local service settings
Use the worklist
PACS Actions menu
Worklist shortcut menus
Edit Study screen
QC operations

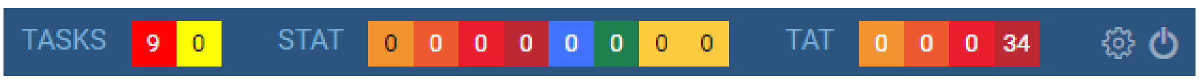
Worklist settings

This section contains the following topics (not all topics may be available depending on version and region).

About toolbars and elements in the worklist

The worklist provides the following toolbars and other items. Notice that there is a settings menu button in both the upper and lower toolbar, but they open different menus.

Upper toolbar



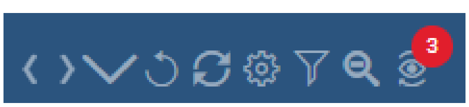
1 2 3 4 5

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

1	Tasks	Shows the number of tasks by urgency. Select to jump to the Tasks list.
2	STAT meter	Shows the number of studies at each Stat (urgency) level.
3	TAT meter	Shows the number of studies at each TAT (turnaround time[1]).
4	Settings	Opens the settings menu.
5	Log off	Signs the current user out.

1. The time it takes for a study to reach Approved status.

Lower toolbar



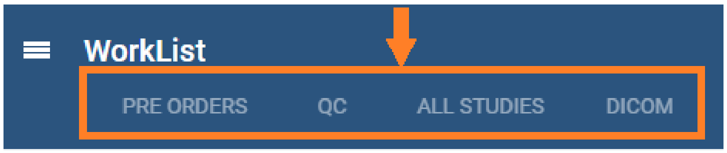
1 2 3 4 5 6 7 8

The lower toolbar contains the following elements.

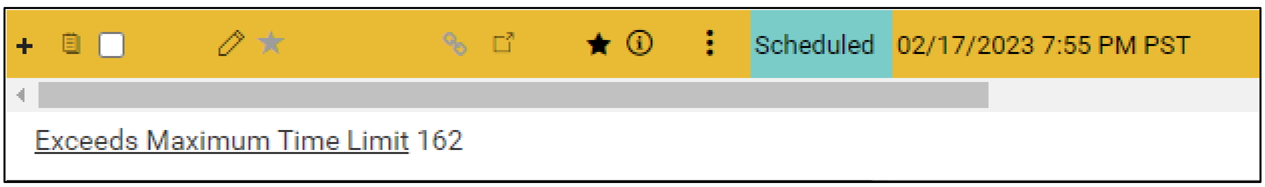
1	Move tabs left/right	Left/right justifies the worklist filter tabs.
2	Filter menu	Select from any available filter tab.
3	Refresh	Updates the worklist, but keeps manually entered filters.
4	Refresh all	Updates the worklist, clearing all filters.

5	PACS Actions	Opens the PACS Actions menu.
6	Filters	Opens the Study Filters dialog.
7	Search tools	Shows/hides the search bar.
8	Disagreements	Exa PACS/RIS only.

Filters



Filter tabs (figure above) appear on the left side of the worklist by their labels. The Exceeds Maximum Time Limit filter (figure below) appears at the bottom of the worklist.



The following table describes the four types of filter tab (filters) that are available in the worklist.

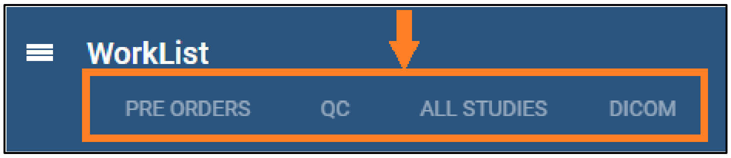
Type	Name	Description
Optional (Can be hidden)	PRE ORDERS	Exa PACS/RIS only.
	QC	Lists received studies needing reconciliation. See QC operations.
Permanent (Cannot be hidden)	ALL STUDIES	Lists all DICOM studies and scheduled RIS orders that are not currently on the QC tab.
User Filters (Can be hidden)	[user-defined]	Provide a highly customized view of the worklist. See Create a user worklist filter.
Administered worklist filters	[administrator-defined]	Same as a user filter, but created by an administrator for a user, and cannot be changed by the user. See Configure an administered worklist filter.
Temporary	Exceeds Maximum Time Limit	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

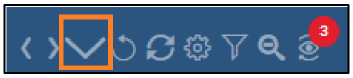
You can display optional filters (such as PRE ORDERS or QC) in the following two ways. To display user filters, you can use these steps if the filter was configured to appear as a tab or in the tabs list.

Procedure

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.

Procedure

1. On the worklist lower toolbar, select the filter button.
2. In the Study Filter dialog, select ADD.
3. Enter the following criteria. See an example below the table.

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. Administrators can use these settings to assign the filter to specific users or user groups.
Default Column/Sort By	Sorts the worklist by the column and order that you select.

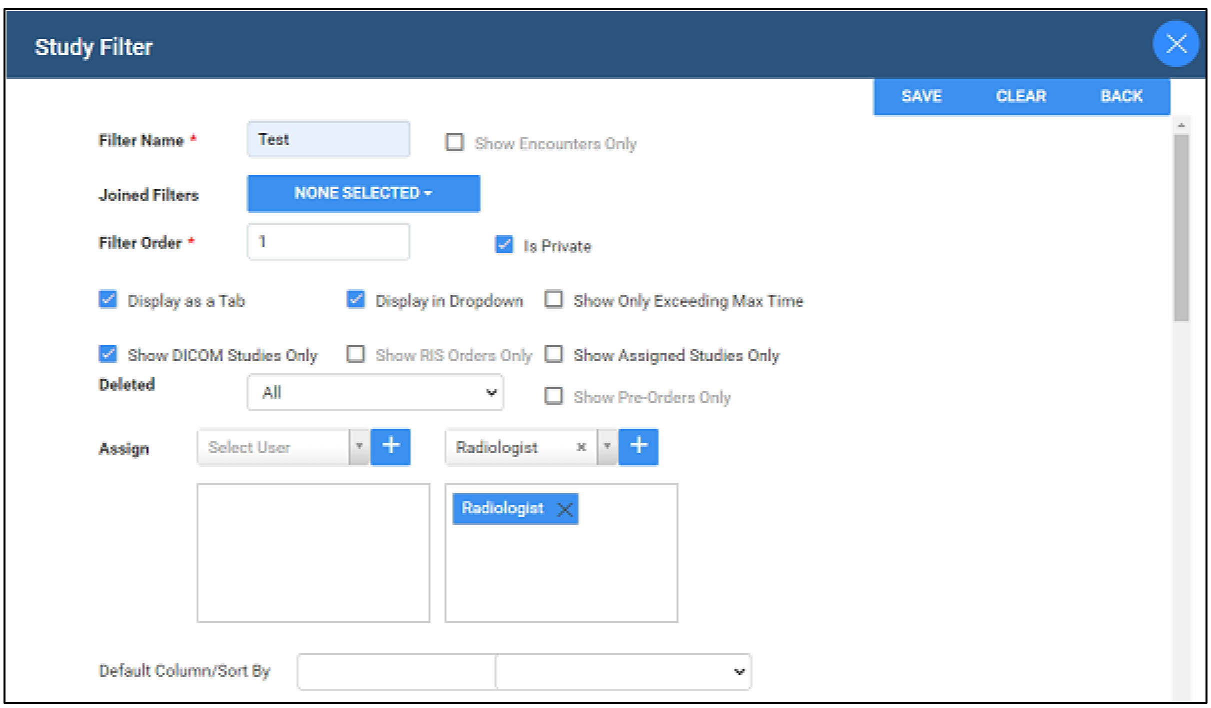
Setting	Description
DATE/TIME	Filters studies by a range of dates and times.
PATIENT INFORMATION	Filters studies by patient or account number.
STUDY INFORMATION	Filters studies by institution, facility, modality, body part, and other categories.
RESOURCE	Filters studies by physician or attorney.
INSURANCE	Filters studies by insurance provider.

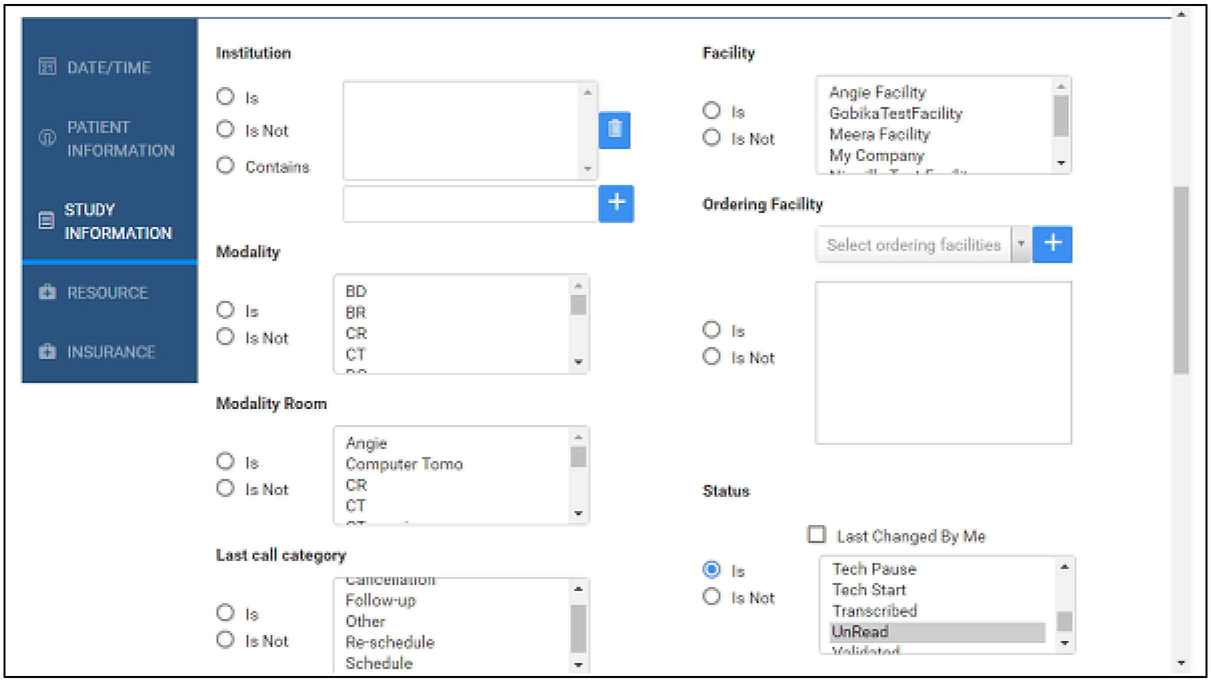
Note: When available, you can use the Is operator and Blank criteria to search for studies that are missing information. For example, in the INSURANCE category, under Insurance Provider, select Is, and then select Blank to search for studies with no insurance.

Example

The settings in the figure below define a filter with the following properties:

- Appears as the first available user filter
- Is Private (only available to the user who created it)
- Appears as a tab on the worklist
- Appears as a menu option in the list of filters
- Shows only DICOM studies
- Is only available to users of type Radiologist
- Only displays studies in Unread status





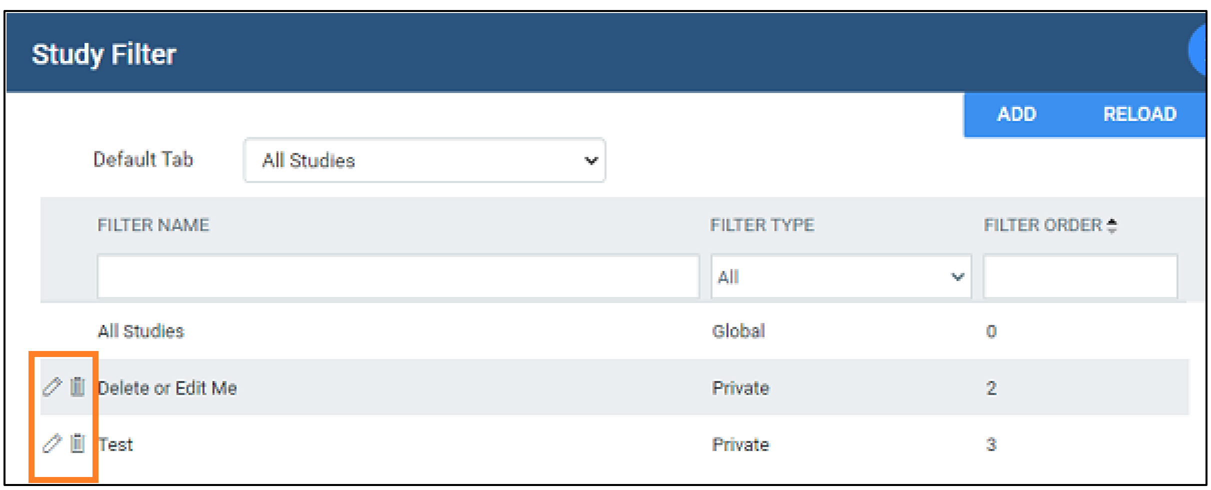
4. Select SAVE.

Edit or delete a worklist filter

You can edit or delete a filter that you created.

Procedure

1. On the worklist lower toolbar, select the filter button.



2. 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).

Procedure

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. The settings only apply for the user who configured them, so all users can have their own unique settings. User settings override global settings, except for security settings.

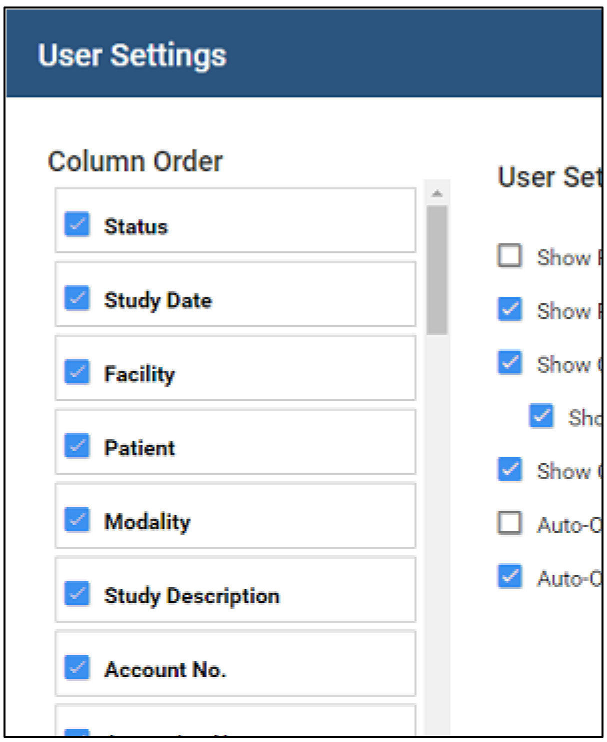
This section contains the following topics (not all topics may be available depending on version and region).

Configure worklist columns

You can show, hide, and order columns in the worklist.

Procedure

1. Go to Worklist > Settings > User Settings.



2. 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: While viewing the worklist, you can also drag columns directly to new positions.

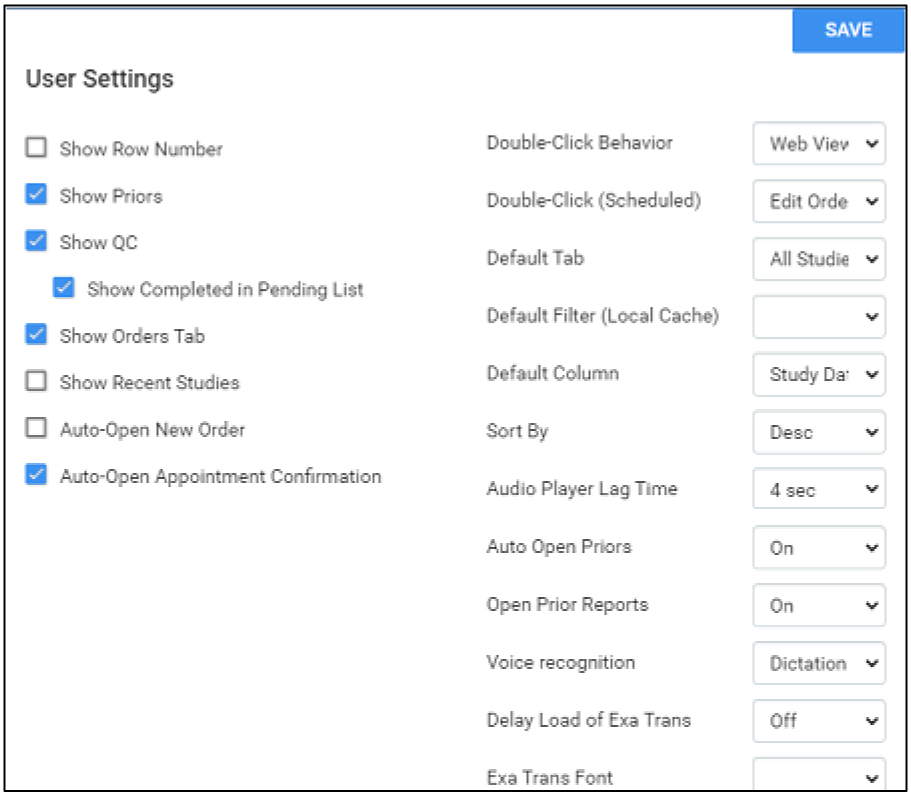
3. Select SAVE.

Configure other user settings

You can customize behaviors and settings for worklist tabs, columns and rows, and configure other user settings.

Procedure

1. Go to Worklist > Settings > User Settings.



2. Enter the following settings.

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.
Show Recent Studies	Select to show the RECENT STUDIES tab in the worklist. This filter contains the 25 most recent studies that were opened in the viewer.
Auto-Open New Order	Select to automatically open the Edit Study screen after selecting the CREATE ORDER button (Symmetry PACS only).

Setting	Description
Auto-Open Appointment Confirmation	Select to automatically open the appointment confirmation screen after selecting the CREATE ORDER button (Symmetry PACS only). See also Confirm an appointment.
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 (the filter that initially appears when you open the worklist).
Default Filter (Local Cache)	The default filter for local cache. If local cache is installed and configured, studies in this filter are locally cached per settings.
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. Other (Exa Trans/SDE): Opens Exa Trans with no Exa platform-based voice recognition app (which can be faster). 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.

3. Select SAVE.

Viewer settings

See Configure the viewer.

Local service settings

See Install and configure local cache.

Use the worklist

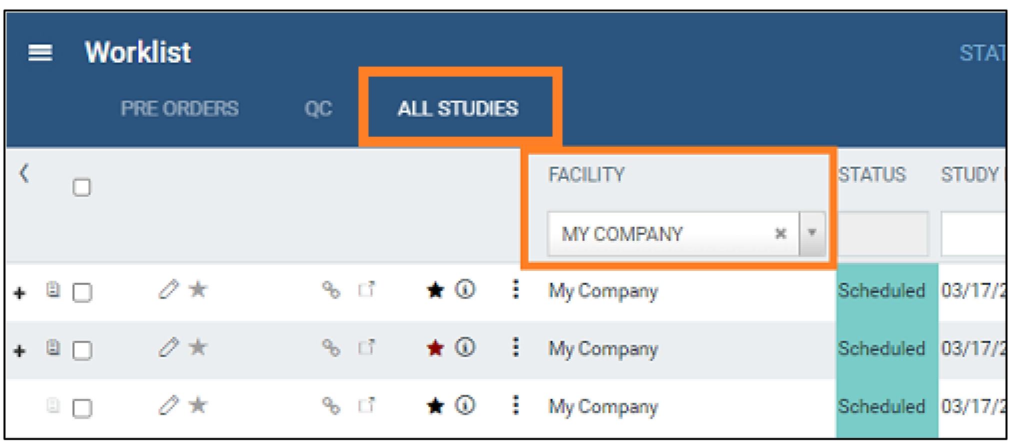
This section contains the following topics (not all topics may be available depending on version and region).

Find studies

You can find a study and open it to view or edit details.

Procedure

1. On the Worklist, select ALL STUDIES.
2. In the search bar, do one or both of the following:
   - In a column header (such as FACILITY), type or select one or more criteria and press Enter.
   - Select a column header to sort the list.



3. Double-click a study in the list to open it for viewing or editing.

See also:

Search syntax

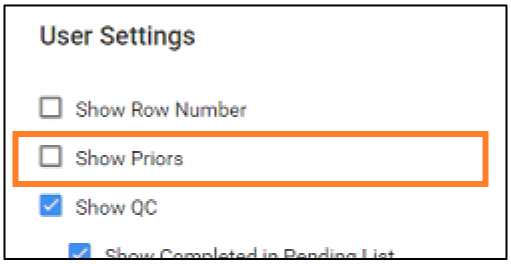
View approved reports

View series and images

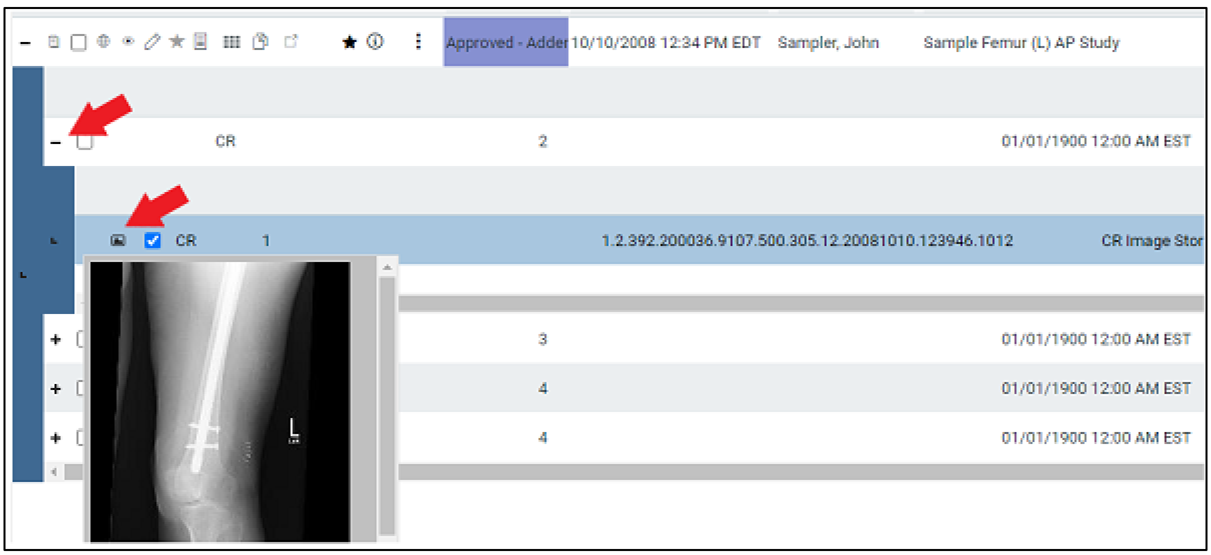
You can view series and images of any study in the worklist that includes them.

Procedure

1. In User Settings, clear the Show Priors checkbox and select SAVE.



2. In the worklist, find a study containing images and select its expand + button.



3. Expand series rows by selecting the + button.

4. To view a thumbnail of an image, select the button.

Note: To view an image thumbnail, the status must be Incomplete or Unread.

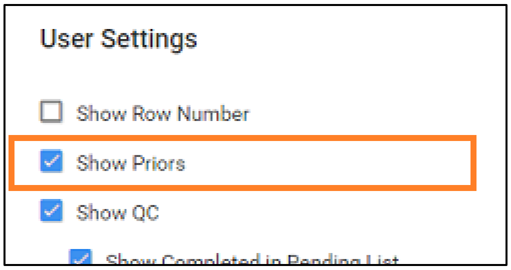
5. To open series and images in the viewer, double-click the main study.

View priors

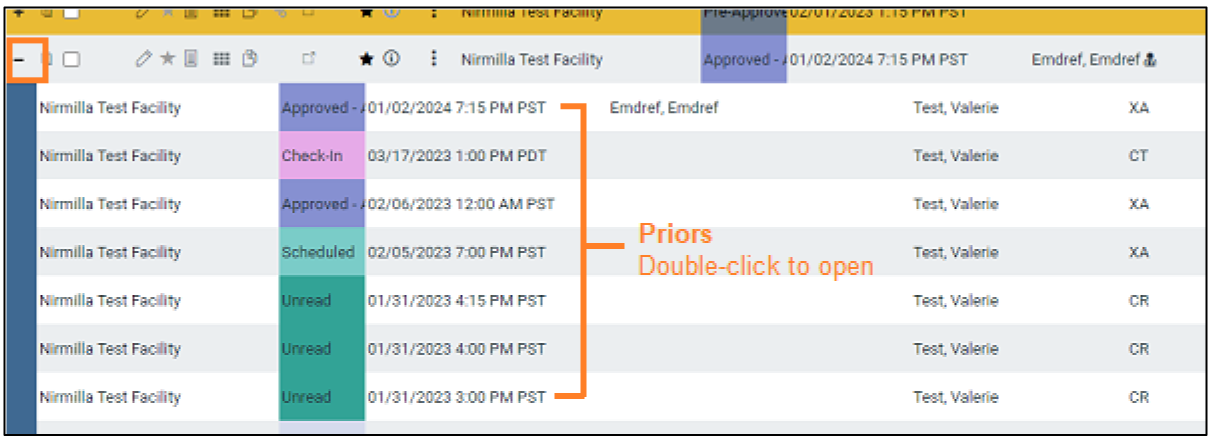
You can view the prior studies of any study in the worklist that includes them.

Procedure

1. In User Settings, select the Show Priors checkbox and select SAVE.



2. In the worklist, find a study and select its expand + button.



Result: The priors appear in rows below the study row.

See also:

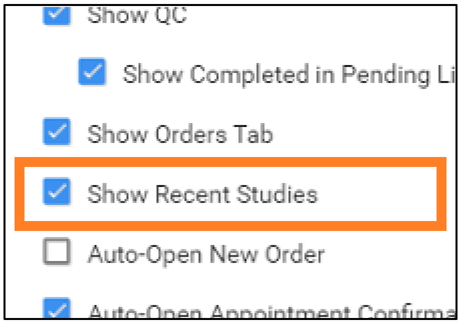
View approved reports

View recent studies

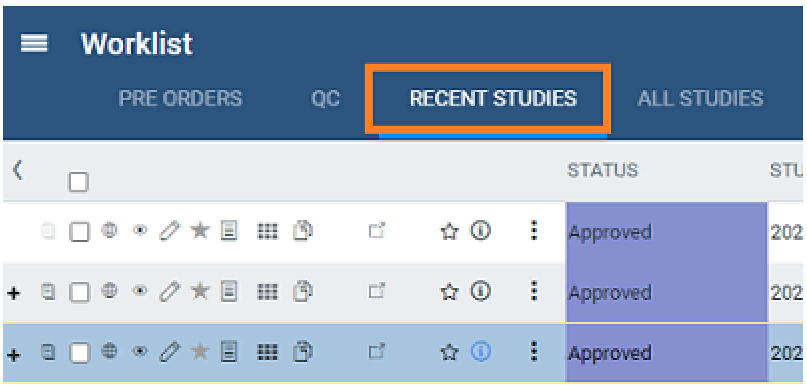
You can view a worklist filter containing the 25 studies that were most recently opened in the viewer. This makes it easy to find studies you viewed recently and want to reopen. Most standard worklist functions are available to you on the Recent Studies tab, but see "Details" below for exceptions.

Procedure

1. In User Settings, select the Show Recent Studies checkbox and select SAVE.



2. In the worklist, select the RECENT STUDIES worklist filter.



Details

The Recent Studies tab works like the All Studies tab except:

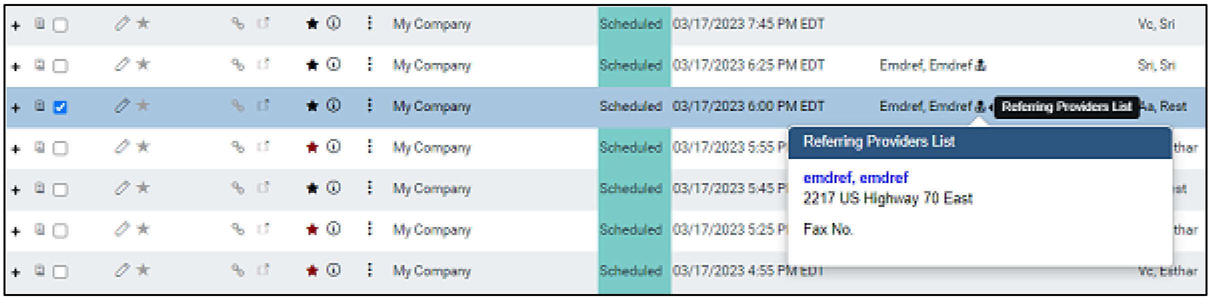
- You can't sort it (it's automatically sorted in first-in-first-out (FIFO) order by date/time of viewing).
- Priors opened during a viewer session do not appear on this tab, but priors originally opened from the worklist do.
- Stat level has no effect on the sorting of the list.
- The program creates a unique recent studies tab for each user.
- If you open a study from the worklist more than once, only one entry appears on the recent studies tab.

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.

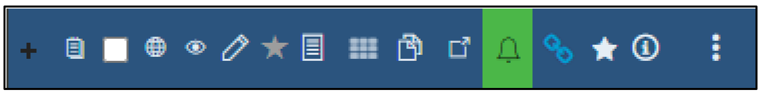
Procedure

1. On the Worklist, in the REFERRING PHYSICIAN or ORDERING FACILITY column, select the doctor symbol.



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 subsequent commands.
	DICOM Viewer	Open the study in the Exa PACS viewer. Available for studies that contain images.
	Opal Viewer	Open the study in the Exa Client viewer (see Install Exa Client Viewer). 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:

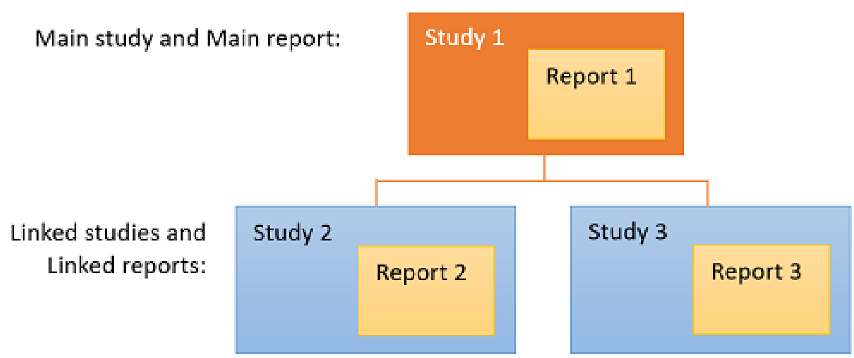
Work with the Symmetry PACS viewer
Edit study screen
Worklist shortcut menus

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 or addendum 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.

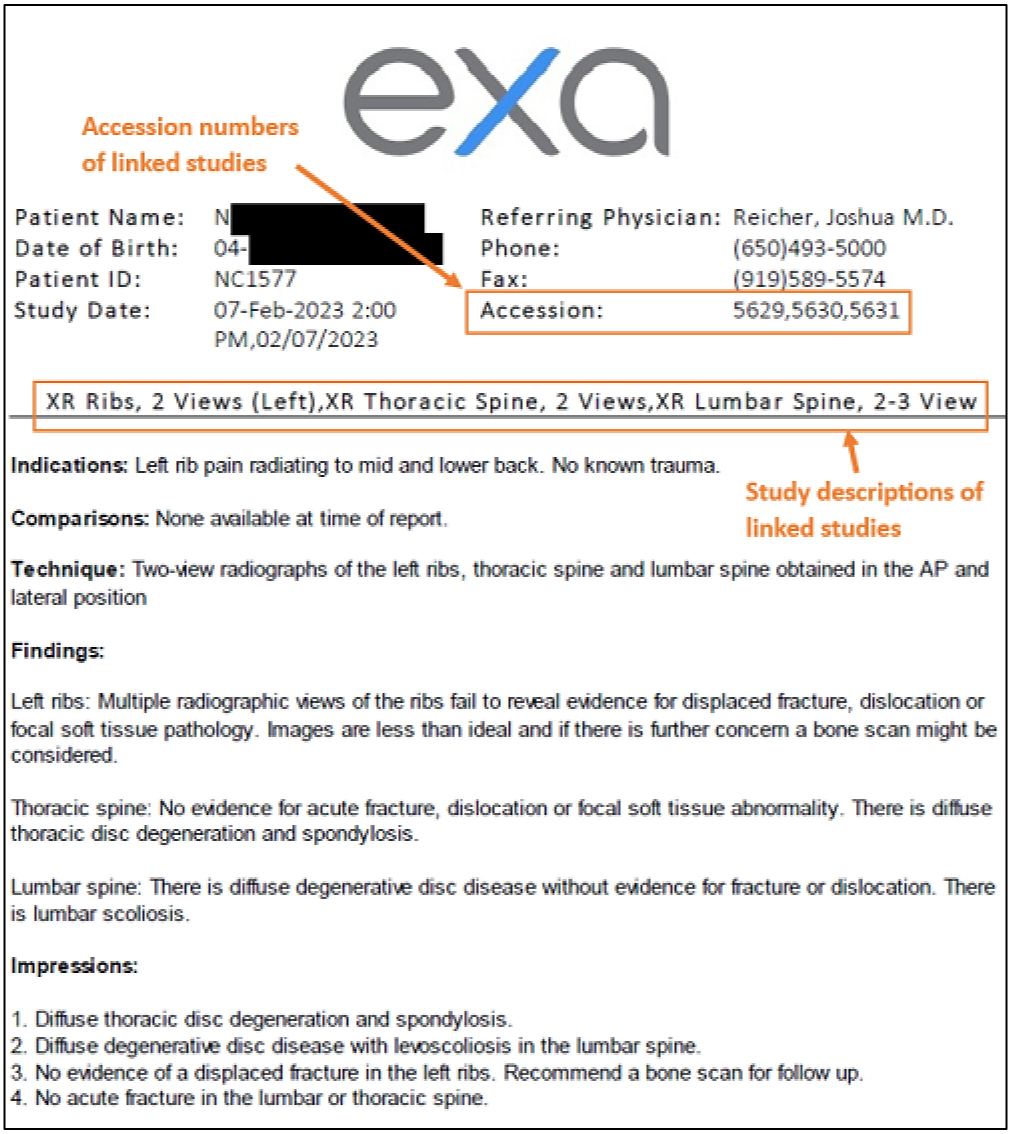
What do linked reports look like?

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.

Approved reports always appear based on the transcription template of the main study, even if the linked studies originally used different transcription templates.

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.

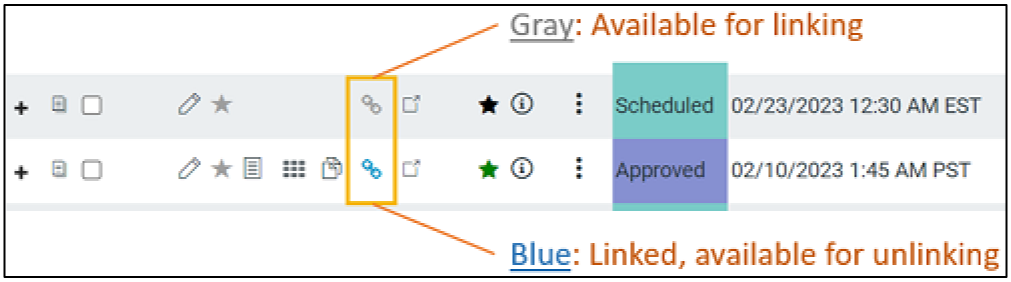
Link reports

To link reports:

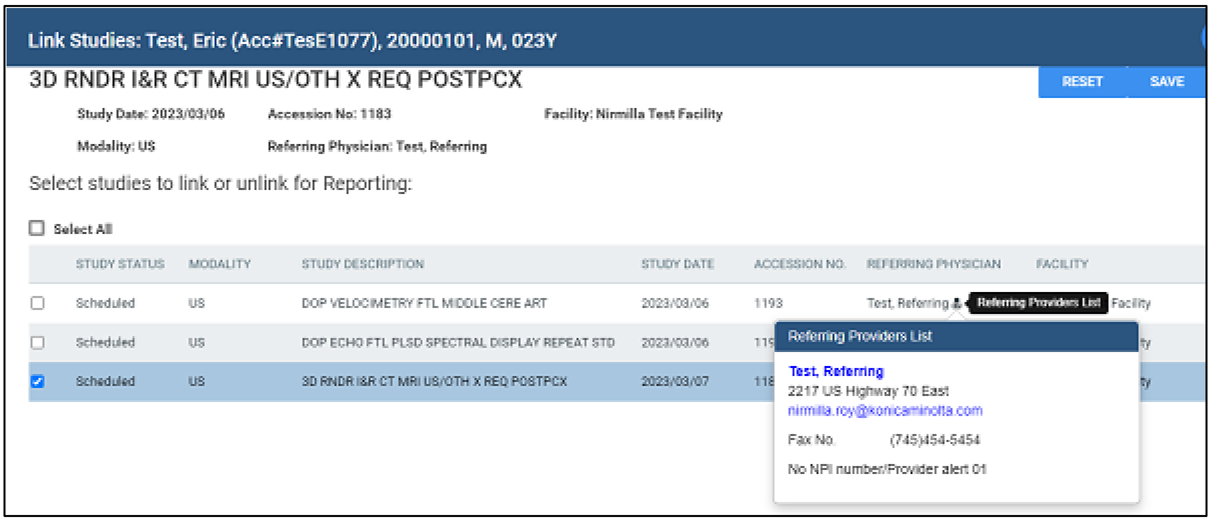
Prerequisite: Obtain the Link Report right from your administrator.

Procedure

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. Optional: Click the physician symbol to display details, and click the physician's name in the pop-up window to edit properties.
4. Select SAVE.

   Result: The reports and studies are 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 right from your administrator.

Procedure

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.

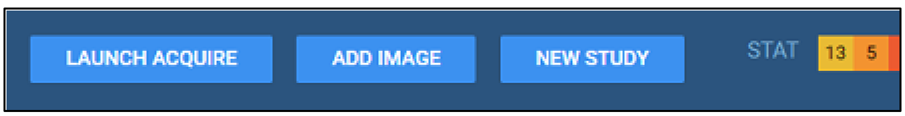
3. Select SAVE.

See also:

About Linked Reporting
Link reports
Details on Linked Reporting

Work with Ultra Acquire

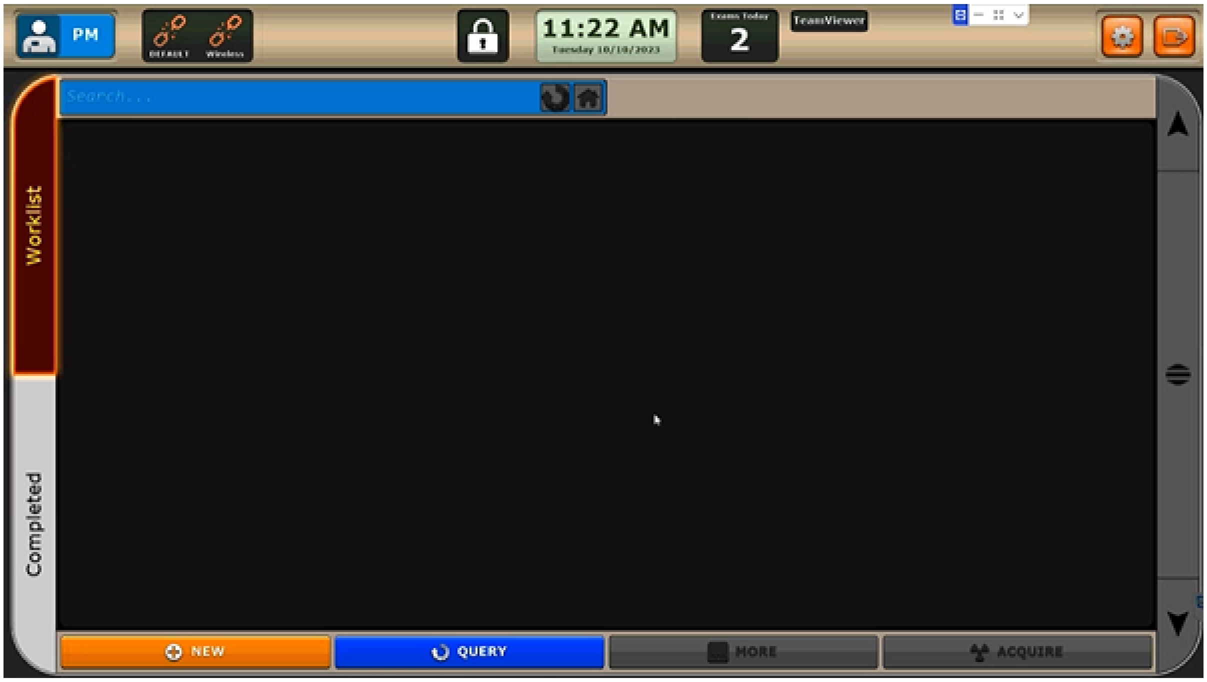
If your facility uses Ultra Acquire, you can access its functionality from the worklist. Three buttons are available as described below.



Worklist buttons available when Ultra Acquire is enabled

Open Ultra Acquire

To open Ultra Acquire and view its worklist, select LAUNCH ACQUIRE.



Add images by using Ultra Acquire

You can add images to a study on the worklist by using Ultra Acquire.

1. On the worklist, select one incomplete study (a study in status: Scheduled, Confirmed, Arrived, Checked In, Tech Start, Tech End, Incomplete, or Unread).
2. Select ADD IMAGE.

   Result: Ultra Acquire opens in Acquire mode.

3. In Ultra Acquire, acquire the images you want to add.
4. Select Accept to accept the images, and then select Exit.

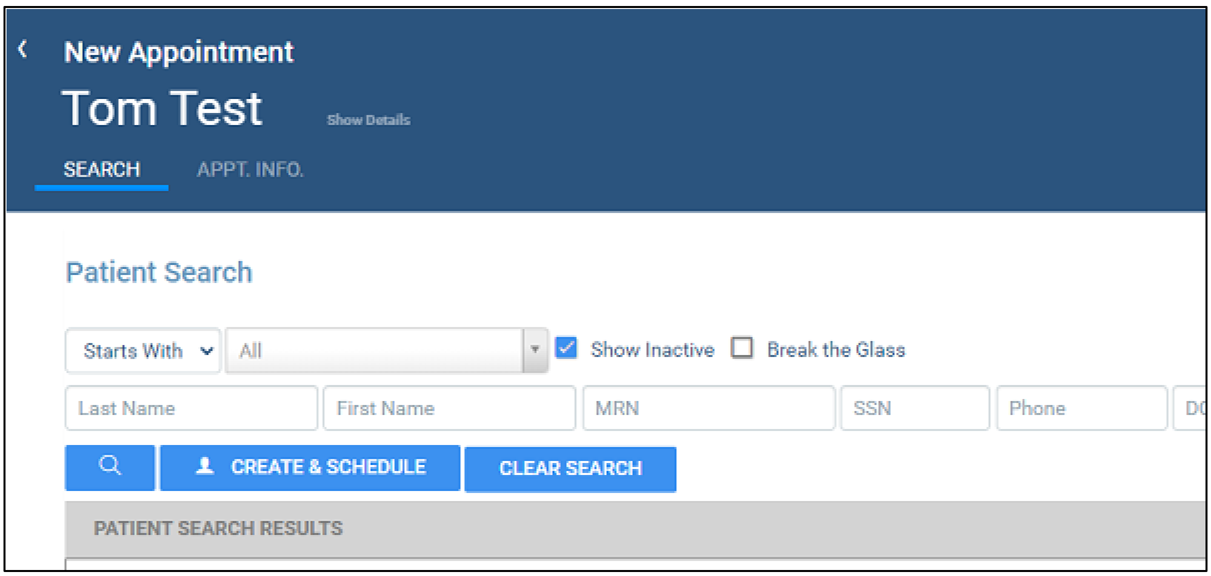
   Result: Images are added to studies and sent to the Symmetry PACS QC tab of the worklist for processing, and then move to the ALL STUDIES tab.

Create a new study by using Ultra Acquire

You can create a new study by using Ultra Acquire as follows.

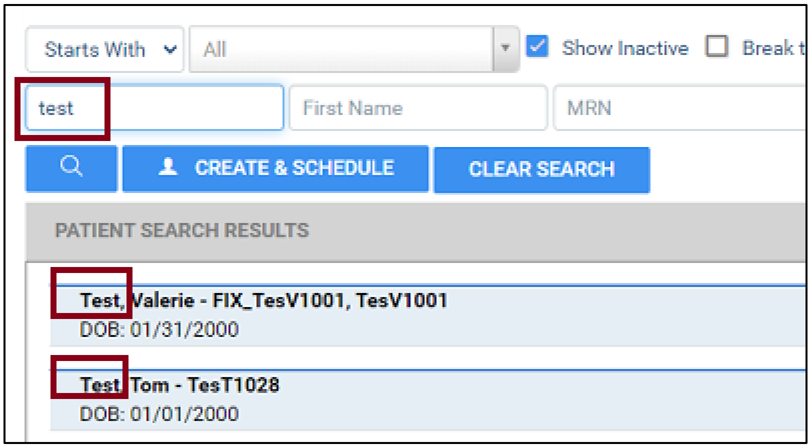
1. On the worklist, select NEW STUDY.
2. In the Select facility dialog, select your facility and select SUBMIT.

   Result: The New Appointment screen appears.

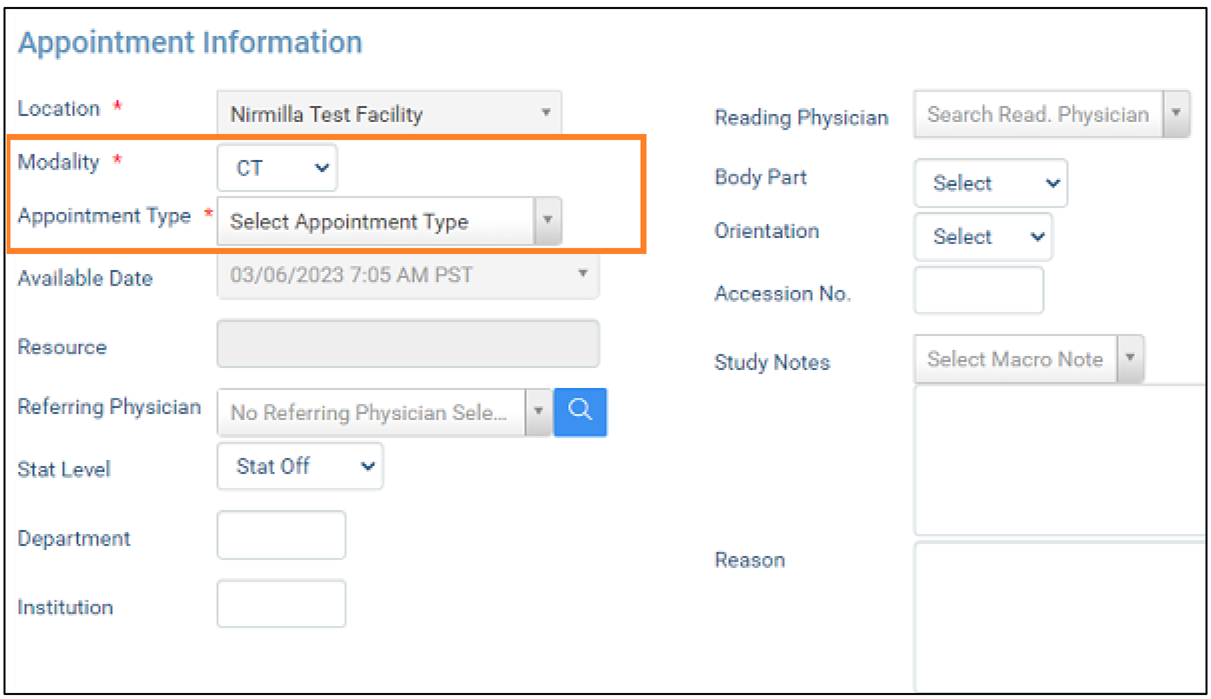


3. In the Starts With dropdown list, select a search mode in the dropdown list (Starts With, Ends With, or Contains).
4. Type all or part of a patient demographic in one or more of the boxes.

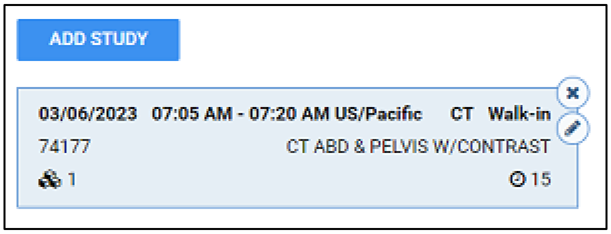
   Optional: If the Break the Glass checkbox appears, you can select it to search for confidential patient records.
5. In the list of search results, double-click the patient for whom you want to schedule an exam.



6. If the Recent Schedule dialog appears, select NEW SCHEDULE.
7. In the APPT. INFO. tab:
   a. Select a modality and appointment type.



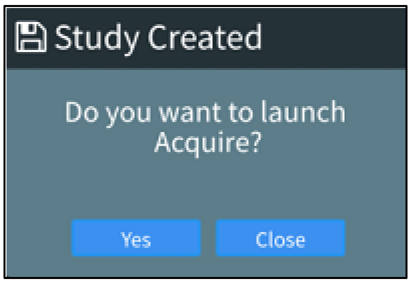
   b. Enter any other information as needed.
   c. Select ADD STUDY.



8. Repeat to add more appointments as needed.

9. Select CREATE ORDER.

   Result: The following dialog appears.



10. Optional: Select Close to save the order and return to the worklist.

11. Select Yes to open Ultra Acquire in Acquire mode.

12. Acquire images for the new study.

    Result: Your new study appears on the worklist.

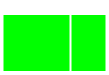
Update the worklist or viewer

After performing tasks that modify studies it may be necessary to update the worklist or viewer to show changes.

- To update 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. 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. You can filter the worklist by critical findings.
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 stat level of an order or study
Assign critical findings to an order or study
Flag an order or study
Change the priority of an order

Use local cache

A *local cache* is a dedicated area on a workstation or server to temporarily store Opal and DICOM studies. Copies of studies are sent from the modality or forwarder to the local cache on the workstation and to the image server in advance for faster subsequent viewing. This can be helpful for large studies, or if your Internet connection is experiencing delays. When the radiologist opens a study that was cached, the cached copy opens instead of the copy on the server. Also note the following:

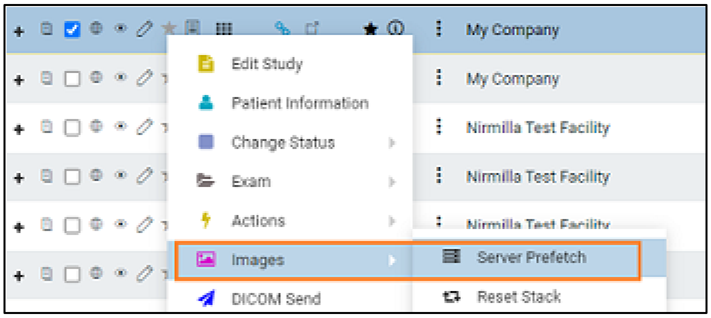
- Stat studies are cached before non-Stat studies, higher levels before lower levels.
- If the Stat level changes after adding to local cache, the change does *not* affect the order of caching.
- For studies with priors, the status does not appear as Study Complete until the original study and all priors are cached.

Prerequisite: Install and configure 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 a worklist study shortcut menu, select Images > Server Prefetch.



Prefetch studies to your local cache

You can manually prefetch studies "on demand."

1. On a worklist study shortcut menu, select Images > 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 a worklist study shortcut menu, select Images > 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:

- Configure an application entity for your local cache.
- Configure 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. In User Settings, in the Default Filter (Local Cache) dropdown list, select the worklist filter.
3. Select SAVE.
4. 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

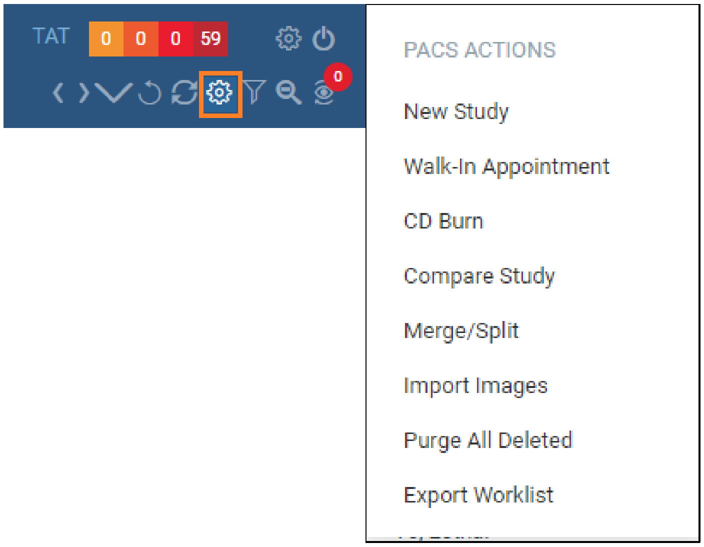
5. Find the line for “oncall_enabled” and set it as follows:

   ```
   “oncall_enabled”: "true",
   ```

6. Save and close the file.

PACS Actions menu

The PACS Actions menu on the worklist provides top-level access to common functions.



This section contains the following topics (not all topics may be available depending on version and region).

Burn studies, series, or images to media

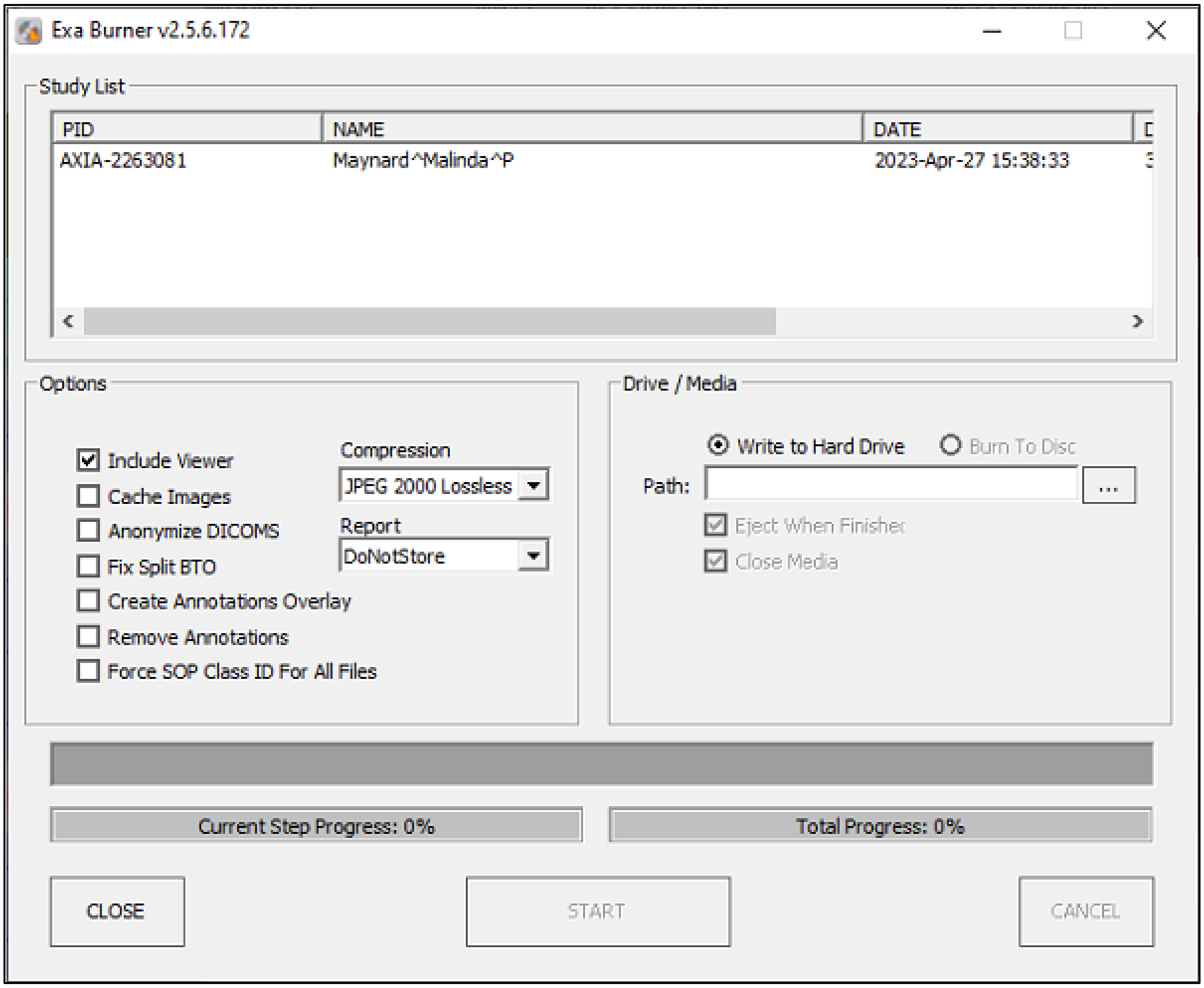
You can burn studies to a removable disc (such as a CD or DVD) or save them to a hard disk for sharing with other facilities, physicians, or patients. To burn images and series, see later in this topic.

Note: Key image references are visible when opening the media at other sites, and when viewing in the Exa Client Viewer or Opal Light.

Prerequisite: Install Opal tools and Install Exa Client Viewer.

Burn studies

1. Place a disc in the drive.
2. In the worklist, select studies whose combined size does not exceed the capacity of the disc.
3. On the PACS Actions menu, select CD Burn.



4. In the Exa Burner dialog, enter the following settings as needed.

Setting	Description
Include Viewer	Select to burn a viewer program onto the disc along with the items. Required for viewing off site.
Cache Images	Select to keep items in the Viewer cache folder (and not remove them after burning).
Anonymize DICOMs	Select to remove identifying patient demographics.
Fix Split BTO	Select to combine multi-frame mammograms into a single DICOM file.
Create Annotations Overlay	Select to convert annotations to an overlay and include them with the images.
Remove Annotations	Select to omit annotations from the burned items.
Force SOP Class ID for All Files	Select to set the Modality tag (0008, 0060) to the value in the DICOM file's SOP Class ID.
Compression	Select a compression algorithm.
Report	Select a report storing method.
Write to Hard Drive Burn to Disc	Select whether to write to the hard disc or removable disc.

Setting	Description
Path	Select the ellipsis button and then browse for and select a destination drive and/or path.
Eject When Finished	Select to eject the disc after burning.
Close Media	Select to finalize the media after burning so that it is no longer available for writing.

5. Select START.

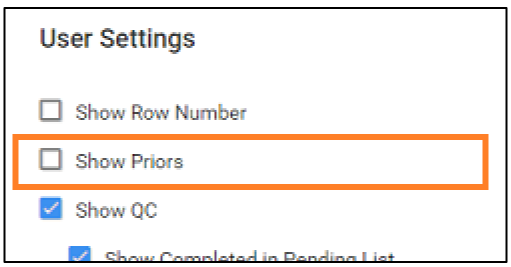
> Note: If the connection is interrupted, burning will automatically resume when the connection is re-established.

6. Optional. After burning, test the results by opening an image from the disc using the included viewer.

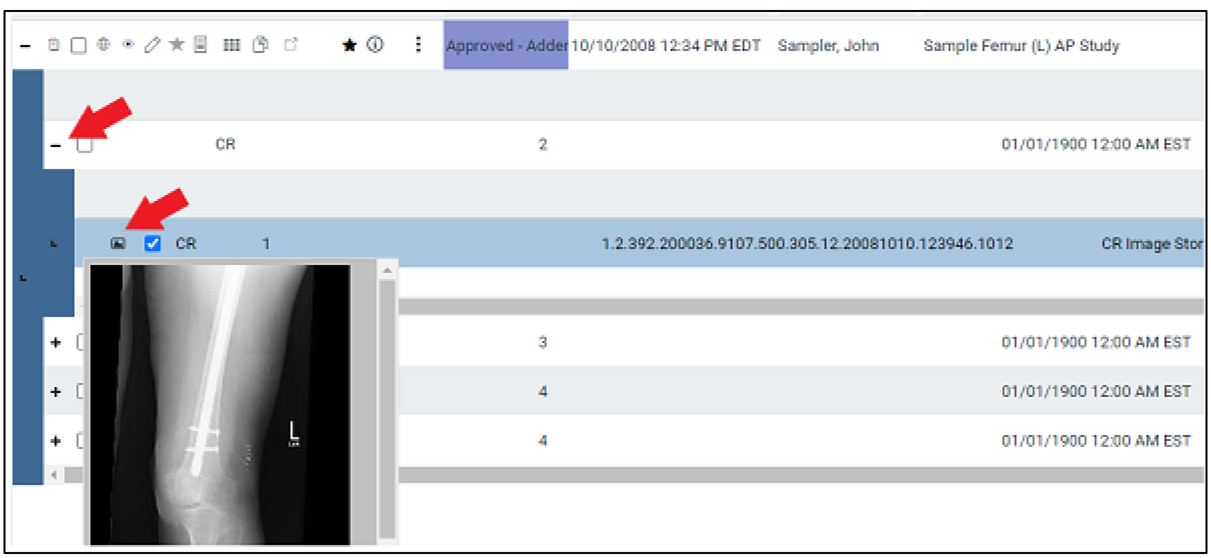
Burn images and series

Use this procedure to burn individual images and/or series.

1. In User Settings, clear the Show Priors checkbox.



2. On the worklist, find images or series to burn by expanding the study row nodes and image preview buttons.



3. Select the checkboxes of the images and series.

4. On the PACS Actions menu, select CD Burn.

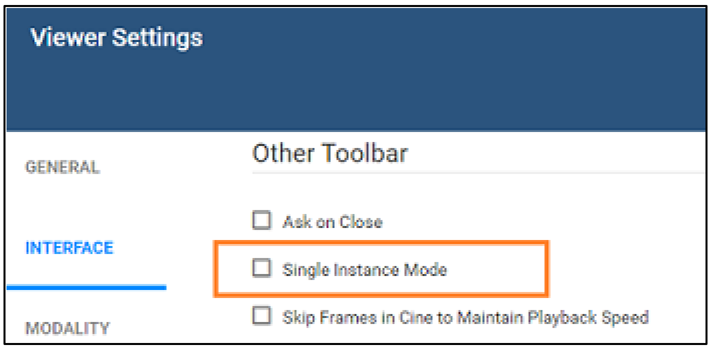
Compare studies

You can open two studies of the same patient in separate viewer screens for purposes of comparison.

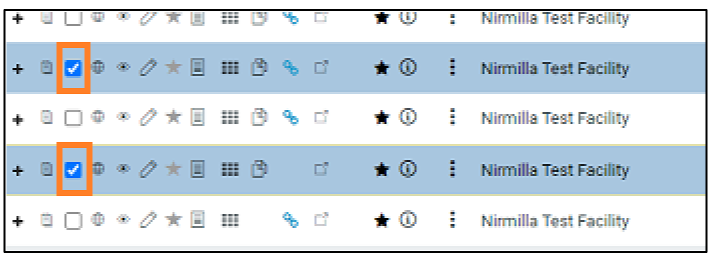
Prerequisite: Configure two or more monitors (see Set up connected displays).

Procedure

1. In Viewer Settings, clear the Single Instance Mode checkbox.



2. In the worklist, select two DICOM studies of the same patient to compare.



3. On the PACS Actions menu, select Compare Study.

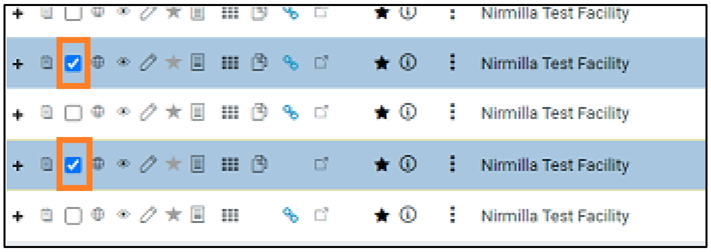
   Result: The two studies open in the Exa PACS/RIS viewer.

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 Add alternate account numbers to a patient chart.

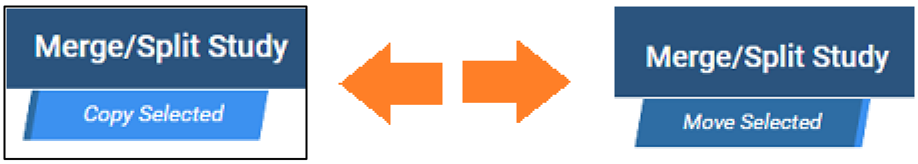
Move or copy a series from one study to another study

1. In the worklist, select two different studies that contain series.



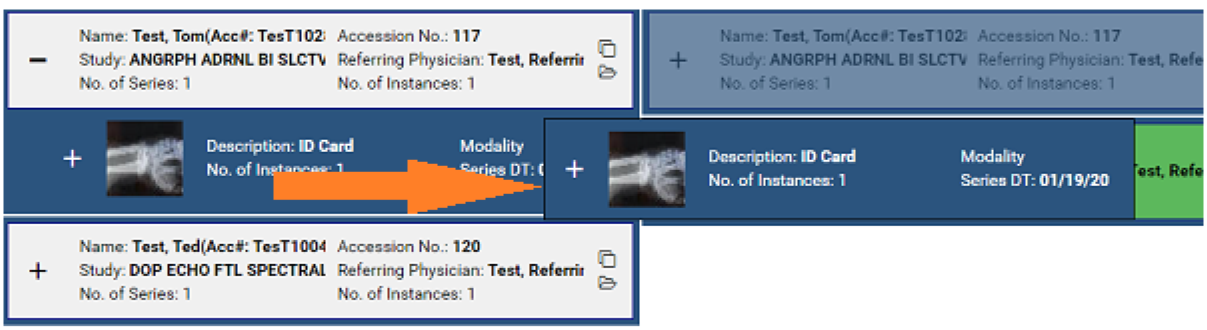
2. On the [PACS Actions]() menu, select Merge/Split.

3. Select the button to choose Move Selected or Copy 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 or copy all images in one series to a series in another study

1. In the Merge/Split To column, select the plus sign of a study to reveal its series.

2. Drag a series in the left column onto a series in the right column.

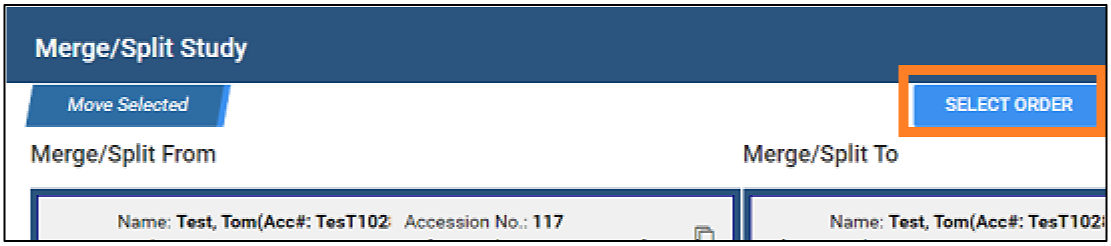
3. Select SAVE CHANGES.

Other moves or copies

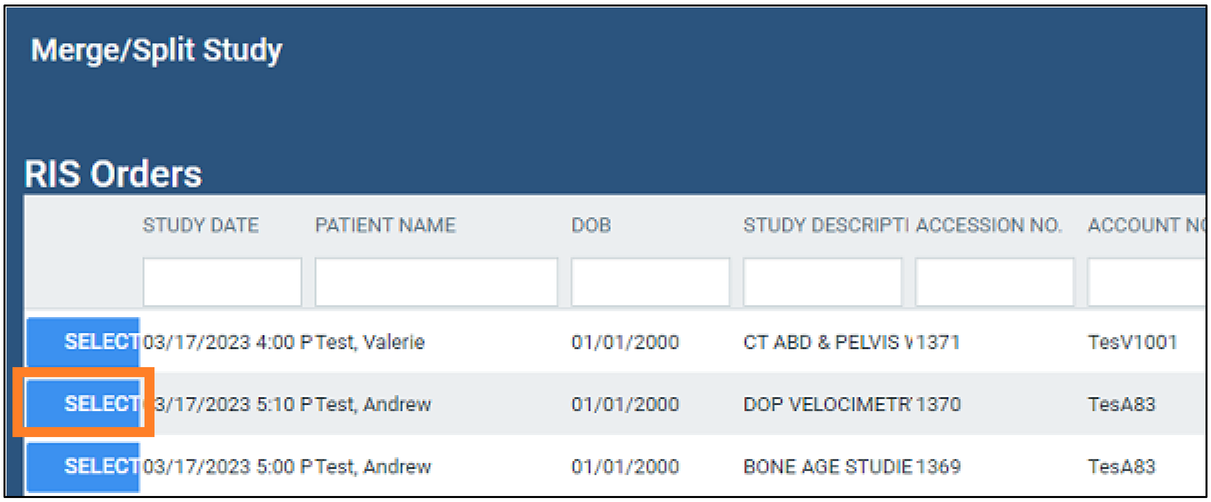
In the same manner, you can expand nodes and move or copy any study, series, or image to another study or series.

Split images into their correct order

1. In the Merge/Split Study screen, select SELECT ORDER.



2. Find the correct RIS order, and then select its SELECT button.



3. Drag the images to the correct order, and then select SAVE CHANGES.

Add a new series to a study

1. In the Merge/Split To column, select the new series button.

> Note: The new series is added to the bottom of the list.

2. On the new series row, select the edit button.
3. 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.

4. Select SAVE CHANGES.

Clone a study

1. 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.

2. Select SAVE CHANGES.

See also:

Add studies to the merge queue

About the PID, MRN, and account numbers

Import DICOM images

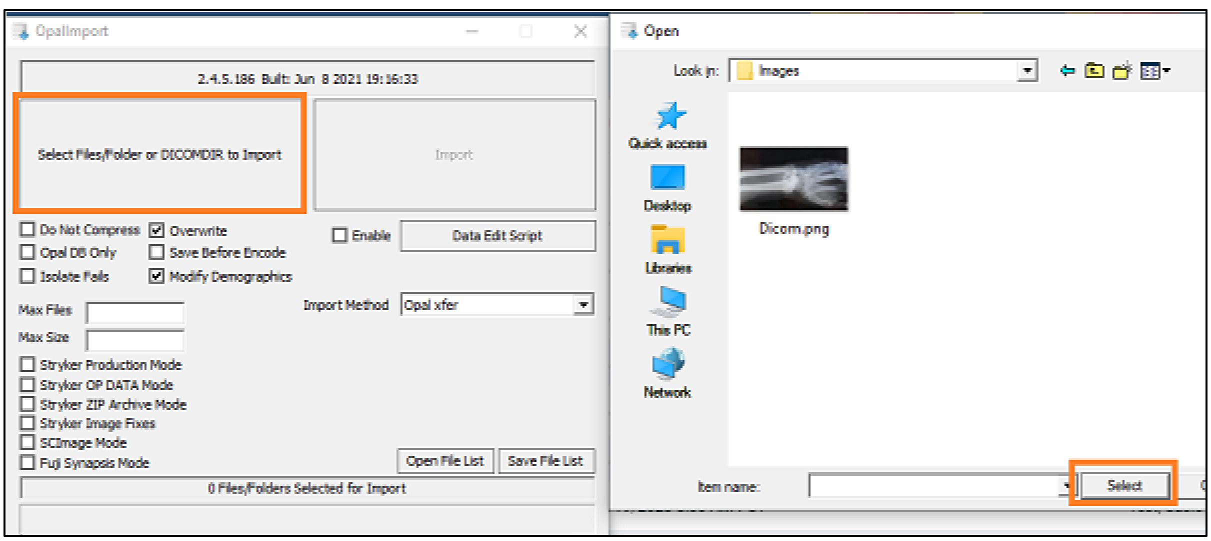
You can import DICOM images from an outside source to a study in Exa PACS/RIS.

Prerequisites:

- Install Opal tools.
- If the study originates from a facility associated with the OPALIMPORT or EXAIMP* AE Titles, obtain access.

Procedure

1. In the worklist, select a destination study for the imported images.
2. On the PACS Actions menu, select Import Images.
3. In the pop-up window, select Open Opal Import.
4. In OpalImport, select Select Files/Folder or DICOMDIR to Import.



5. In the Open dialog, browse for and select files to import, and then select Open.
6. 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 replace 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.

7. Select Import.
8. Optional. If you selected the Modify Demographics checkbox, the Modify/Confirm Demographics dialog appears. Under New Info, do one of the following.
   - Edit the demographics and then select MODIFY.
   - Confirm that the demographics are correct, and then select USE CURRENT.
9. Select Exit.

Purge all deleted

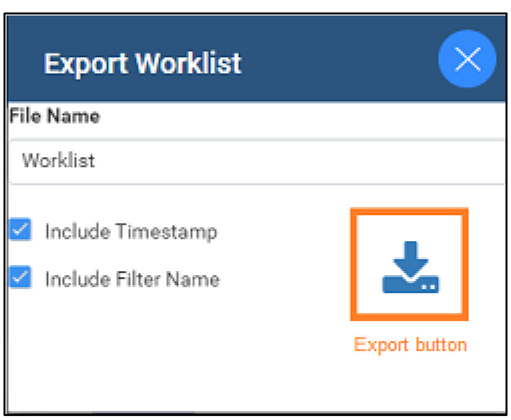
See Undelete or purge a deleted study.

Export the worklist

You can export the worklist to a CSV file.

Procedure

1. On 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.
3. Select the Export button.

Worklist shortcut menus

Exa PACS/RIS and Symmetry PACS have a study shortcut menu for studies in the Unread and later statuses. Additionally, Exa PACS/RIS has an order shortcut menu for PRE ORDERS and studies in the Ordered status. You open shortcut menus by right-clicking anywhere on a study row. 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.

Caution: 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.

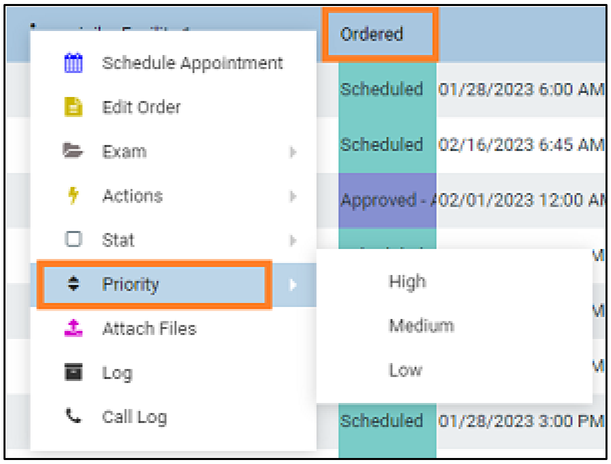
This section contains the following topics (not all topics may be available depending on version and region).

Change the priority of an order or study

You can set the priority of an order.

Procedure

1. Worklist > right-click an order or study > Priority.



2. Select a priority.

See also:

[About drawing attention to orders and studies](#)

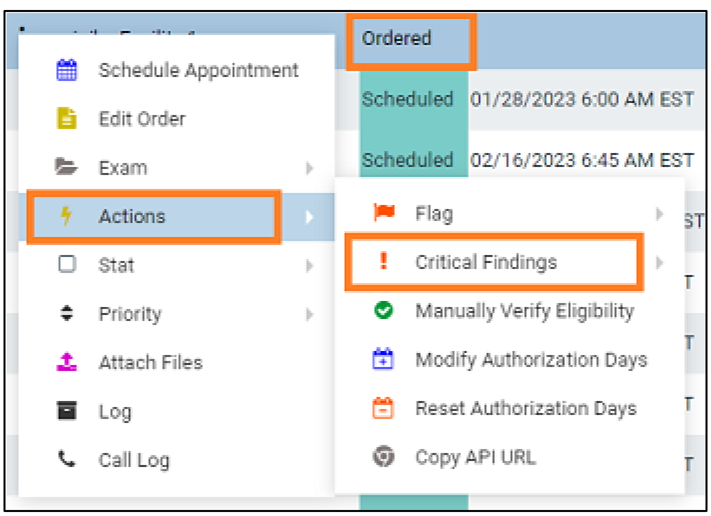
Assign critical findings to an order or study

You can assign critical findings to an order or study (for example, “Acute Positive”).

Prerequisite: Configure critical findings. See [Reason codes](#).

Procedure

1. [Worklist](#) > right-click an order or study > Actions > Critical Findings.



2. In the sub-menu, select a finding.

See also:

[About drawing attention to orders and studies](#)

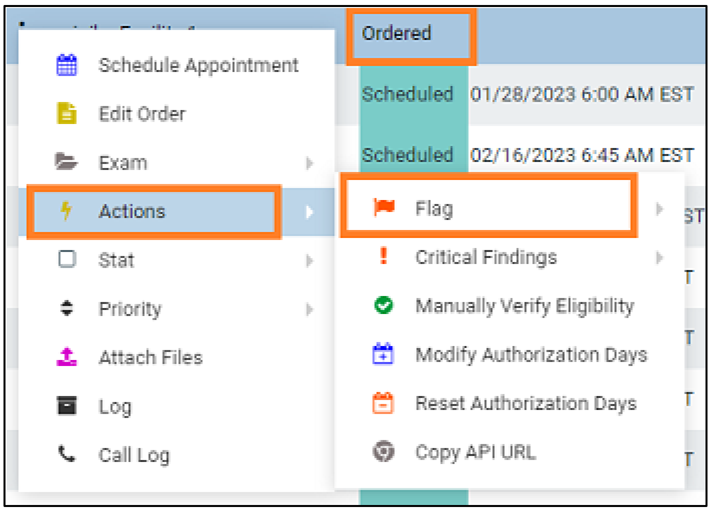
Flag an order or study

You can flag an order or study in the worklist as being of special consideration. You can only apply one flag to an order. After flagging orders or studies, you can filter the worklist by those flags.

Prerequisite: Create a study flag

Procedure

1. Worklist > right-click an order or study > Actions > Flag.



2. On the sub-menu, select one or more flags.

See also:

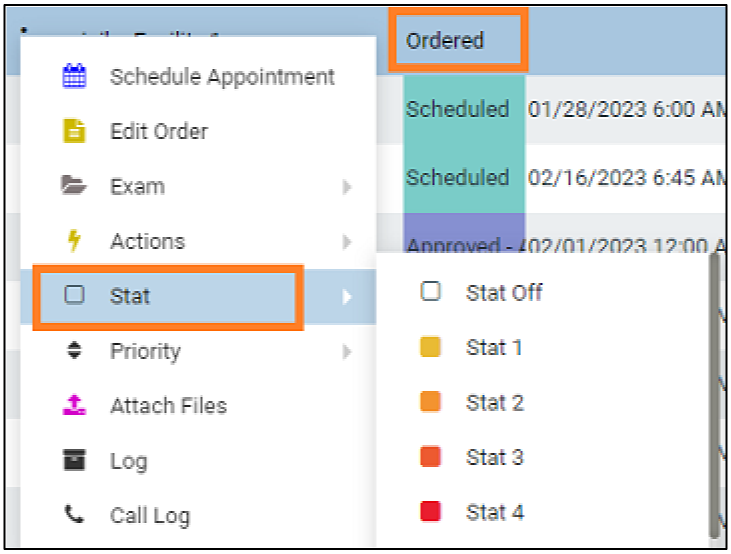
About drawing attention to orders and studies

Change the stat level of an order or study

You can assign or change the stat level or urgency (Stat 1–5, or Off) of an order in the worklist.

Procedure

1. Worklist > right-click an order or study > Stat.



2. In the sub-menu, select a stat level.

See also:

[About drawing attention to orders and studies]

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. To review a document, open it from the Edit Study screen or Technologist screen and select the Reviewed checkbox. To require document review:

Procedure

1. In App settings, add a Scan Document Type and select the Requires Review checkbox.

2. Add a study status, select the Document Review checkbox, and then select the document types to review.

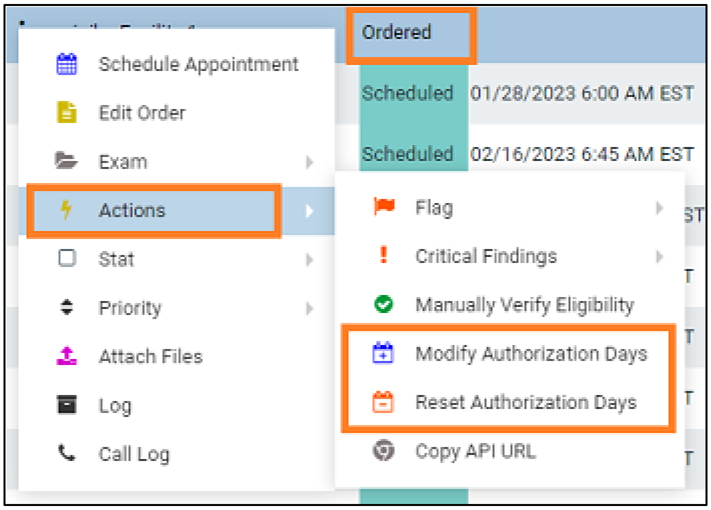
Modify or reset the order authorization days

You can quickly change the number of days specified in an authorization rule associated with an exam. You can:

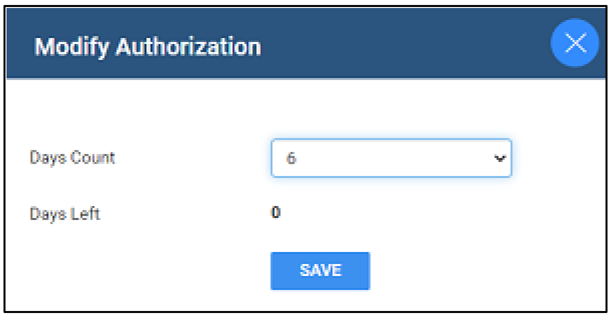
- Reset the days to the number of days set in the rule
- Modify the days to an arbitrary number

Procedure

1. Worklist > right-click an order > Actions > Reset Authorization Days, or Modify Authorization Days.



2. In the Days Count dropdown list, select a new number of days.



3. 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.

Procedure

1. Worklist > right-click an approved study > Exam > Assign Study.
2. 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.

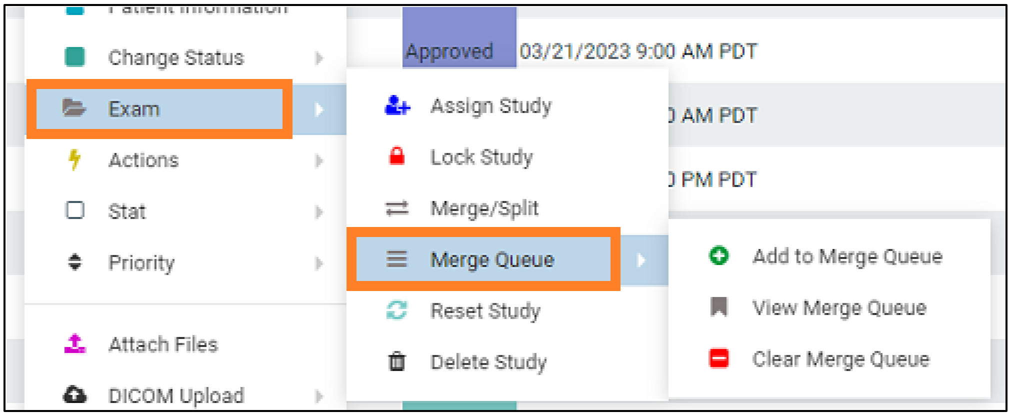
3. Optional. In the Assign to Radiologist dropdown list, select a radiologist as the referring provider.
4. Select SAVE.

Add studies to the merge queue

If you plan on doing "merge work" on a multiple studies you can add studies to a merge queue from the worklist first, and then merge or split them by following the procedures in Merge or split studies.

Procedure

1. Worklist > right-click a study > Exam.
2. Optional. To start merging or splitting with one study at a time, on a study shortcut menu, select Merge/Split.



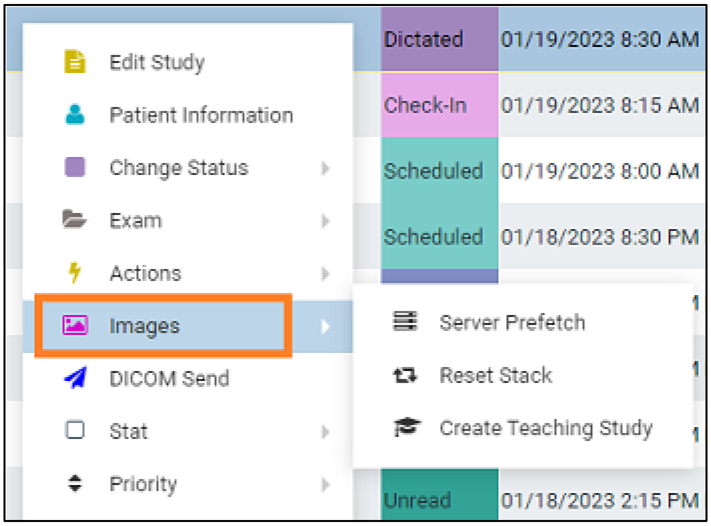
3. On the Merge Queue sub-menu, select Add to Merge Queue.
4. Repeat the previous step for all studies that you want to work with.
5. Right-click one of the studies that you added to the merge queue, hover over Exam, hover over Merge Queue, and then select View Merge Queue.

Create a teaching study

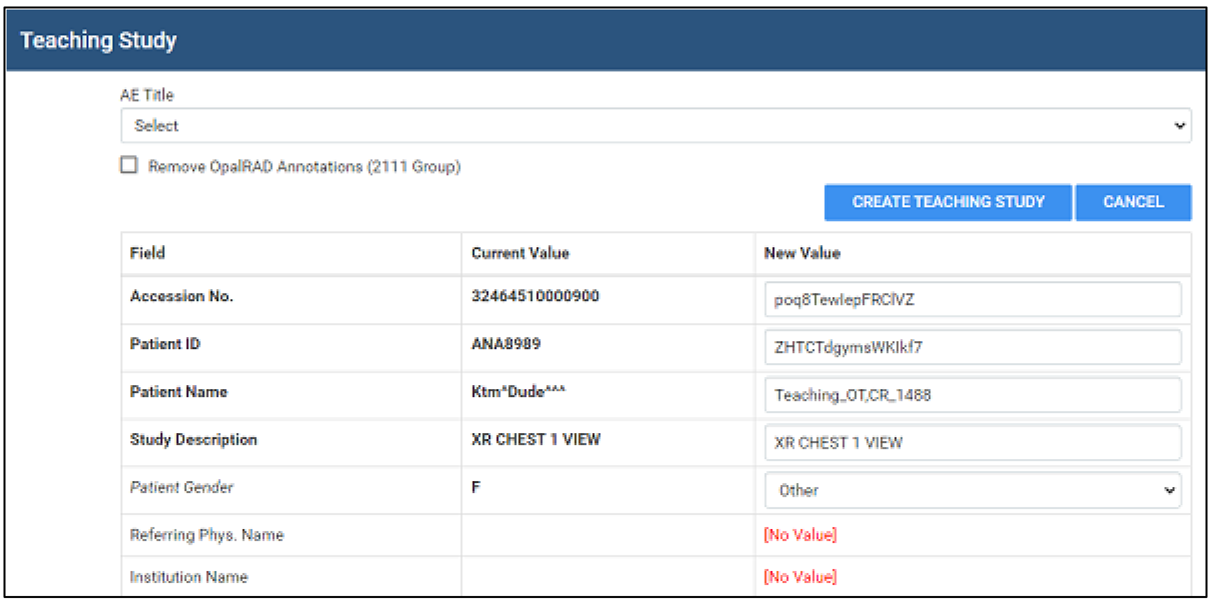
You can create a teaching study by copying an existing DICOM study and anonymizing it.

Procedure

1. Worklist > right-click a DICOM study > Images > Create Teaching Study.



2. In the Teaching Study dialog, in the AE Title dropdown list, select an AE title to which to send the teaching study (where you want the teaching study to be available).



3. In the New Value column, type or select anonymous values for the new study.

4. Optional: To exclude OpalRAD annotations, select Remove OpalRAD Annotations (2111 Group).

> Note: To hide specialty annotations added in OpalRAD (such as for Chiropractic, Podiatric, and Veterinary use), you must select this option or manually remove them from within the created teaching study. You cannot hide them by toggling the overlay.

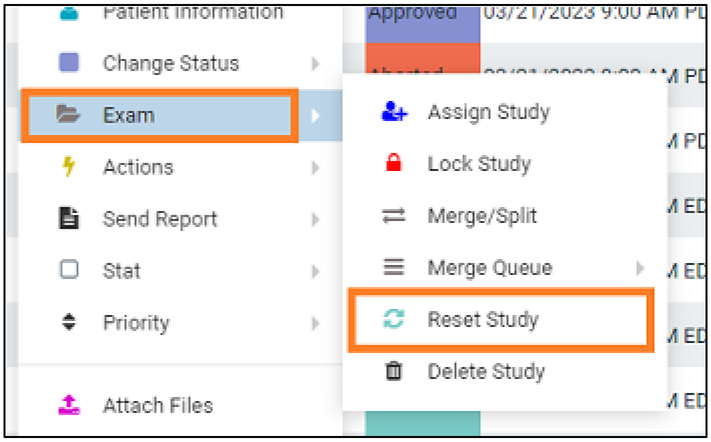
5. Select CREATE TEACHING STUDY.

Reset a study

If the status of a study is beyond “Scheduled” in the study flow, you can reset the status to “Scheduled.”

Procedure

1. Worklist > right-click a study > Reset Study.



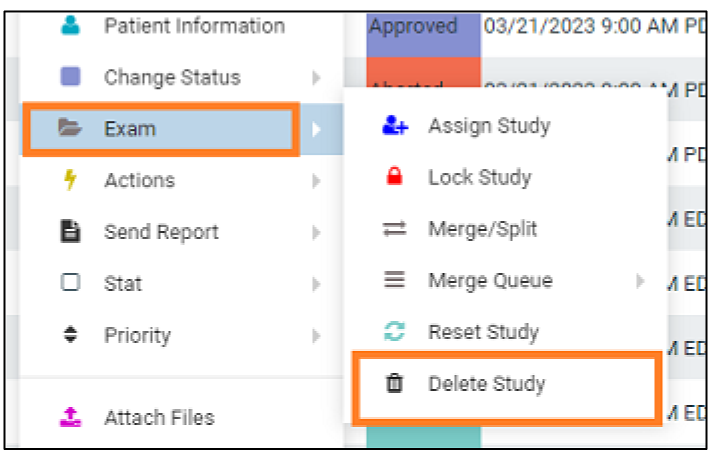
2. In the confirmation dialog, select YES.

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.

Procedure

1. Worklist > right-click a study > Exam > Delete Study.



2. In the confirmation dialog, select YES.

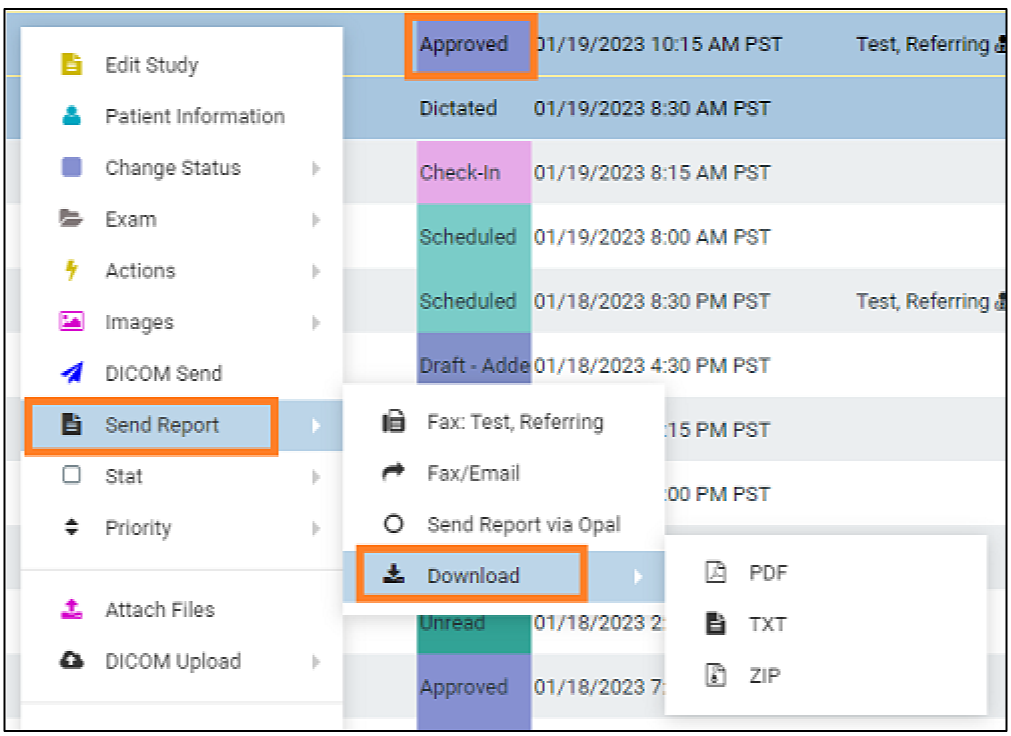
3. In the Delete Reason dialog, select a reason
4. Select SAVE.

Download approved reports

If an approved report is attached to a study, you can download the approved report directly from the worklist.

Procedure

1. Worklist > right-click an approved study > Send Report > Download.



2. Select the format of the report.

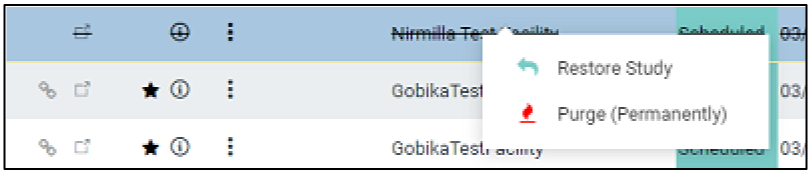
   Result: Symmetry PACS downloads the report to your Windows Downloads folder.

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.

Procedure

1. Worklist > right-click a deleted study.



- To undelete, select Restore Study.
- To purge a deleted study, on the study shortcut menu, select Purge (Permanently), and then select OK.

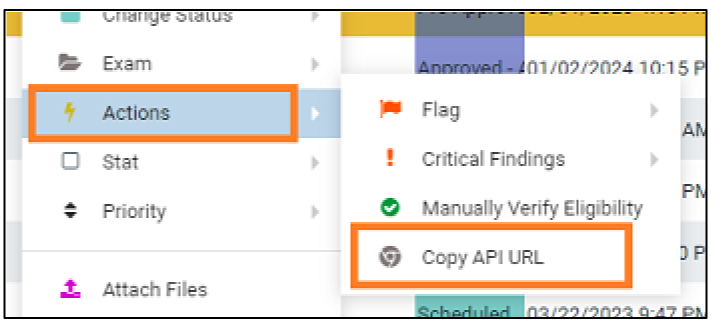
2. To purge all deleted studies at once, on the PACS Actions menu, select Purge All Deleted.

Copy the API URL

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

Procedure

1. Worklist > right-click a study > Actions > Copy API URL.



Result: A pop-up window appears with the API URL.

2. Press Ctrl + C to copy, and then select OK.

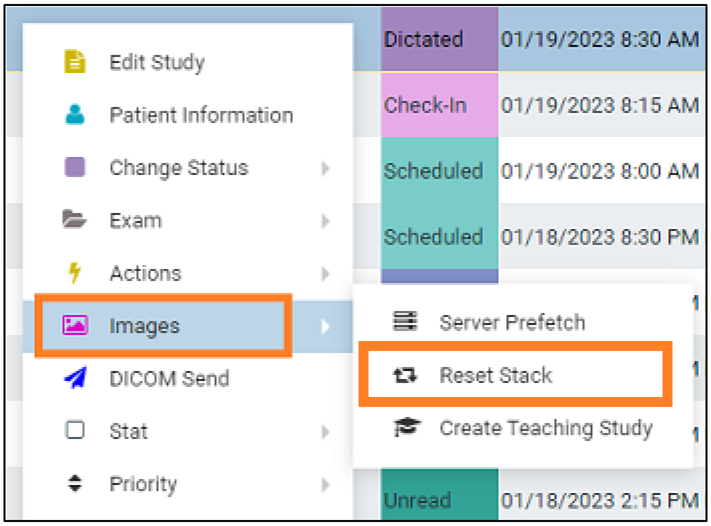
Reset a stack

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.

Procedure

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.



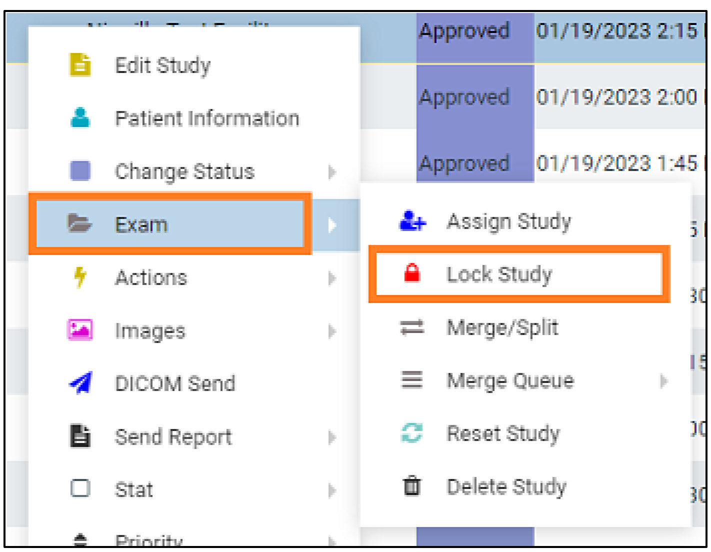
3. In the confirmation dialog, select YES.

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.

Procedure

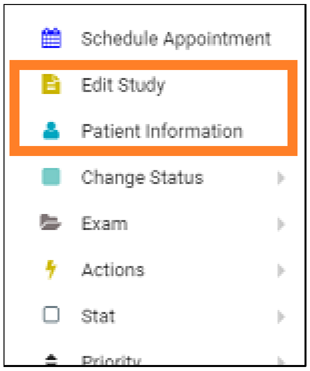
1. Worklist > right-click a study > Exam > Lock Study.



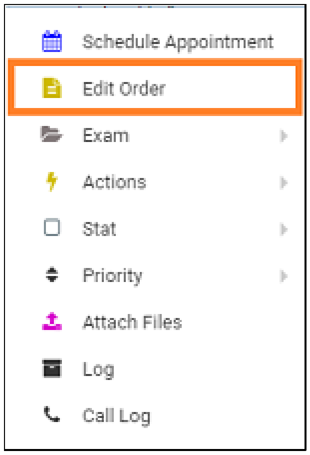
2. To unlock a locked study, on the study shortcut menu, hover over Exam > Unlock Study.

Edit or view 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.



Study shortcut menu



Order shortcut menu

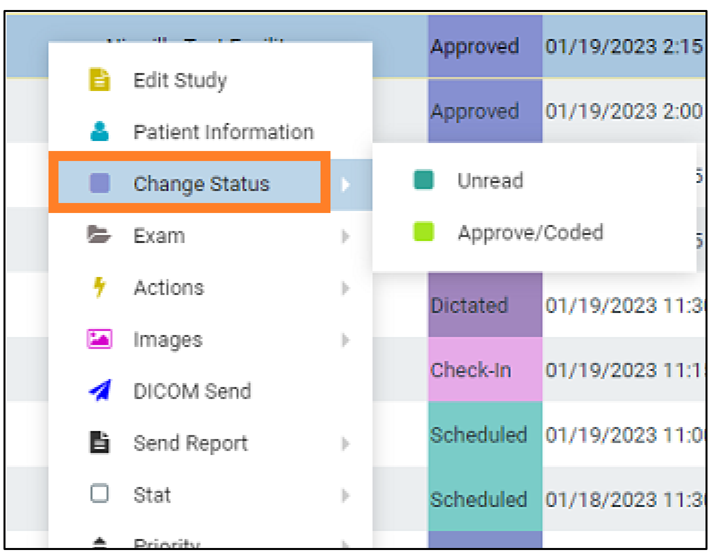
See also:

[Edit study screen]

Change the study status

You can assign or change the status (such as Approved or Transcribed) of a study in the worklist. Procedure

1. [Worklist] > right-click a study > Change Status, and then select a status.



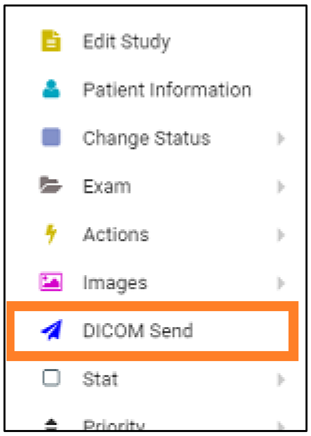
DICOM-send studies, series, or images

You can DICOM-send studies, series, or images 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 an approved report via Opal.

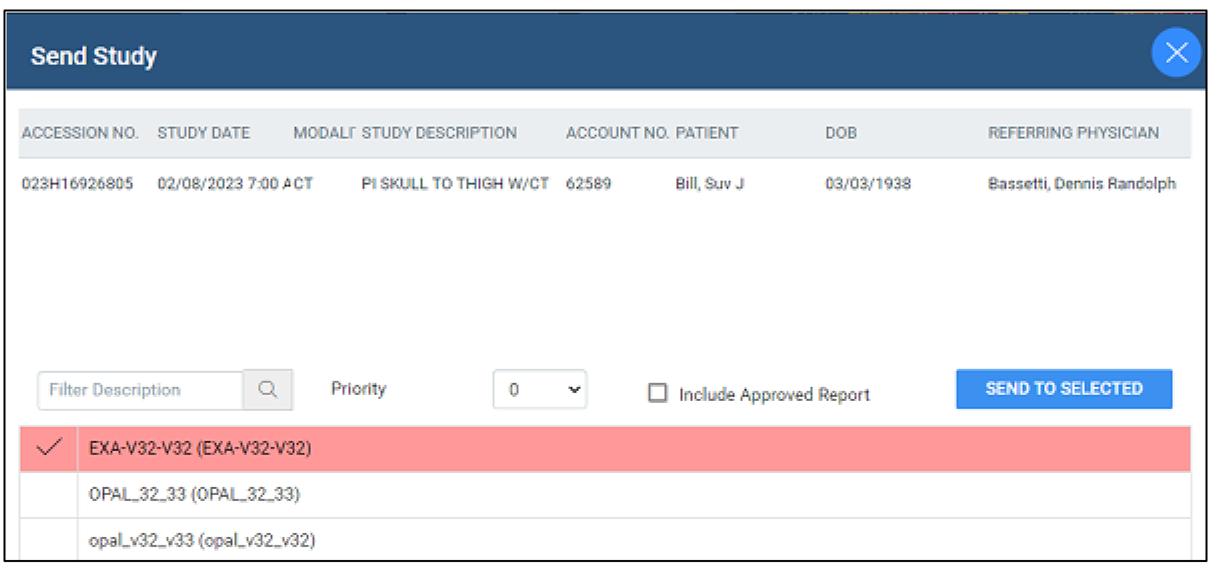
Prerequisite: Configure send destinations (see Configure application entities).

Send studies

1. Worklist > right-click a DICOM study > DICOM Send.



2. 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.



3. In the Priority dropdown list, select a priority.

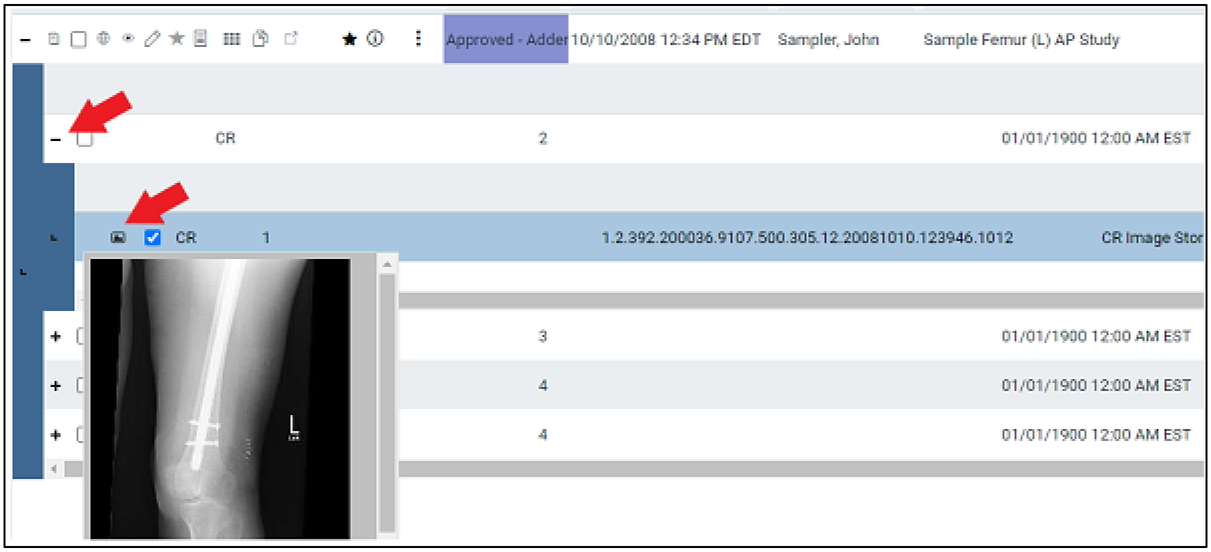
4. Select destinations in the list, and then select SEND TO SELECTED.

   Optional: To send any attached approved reports, select the Include Approved Report checkbox.

5. Optional. To manage in-process send jobs, see Manage jobs in the transfer and SR queues.

Send series or images

1. In User Settings, clear the Show Priors checkbox.
2. On the worklist, find images or series to send by expanding the study row nodes and image preview buttons.



3. Select the checkboxes of the images or series to send.
4. Right-click and select DICOM Send.
5. In the Send Study dialog, in the Priority dropdown list, select a priority.
6. Select the send destinations in the list, and then select SEND TO SELECTED.
7. Optional: To send any attached approved reports, select the Include Approved Report checkbox.
8. Optional. To manage in-process send jobs, see Manage jobs in the transfer and SR queues.

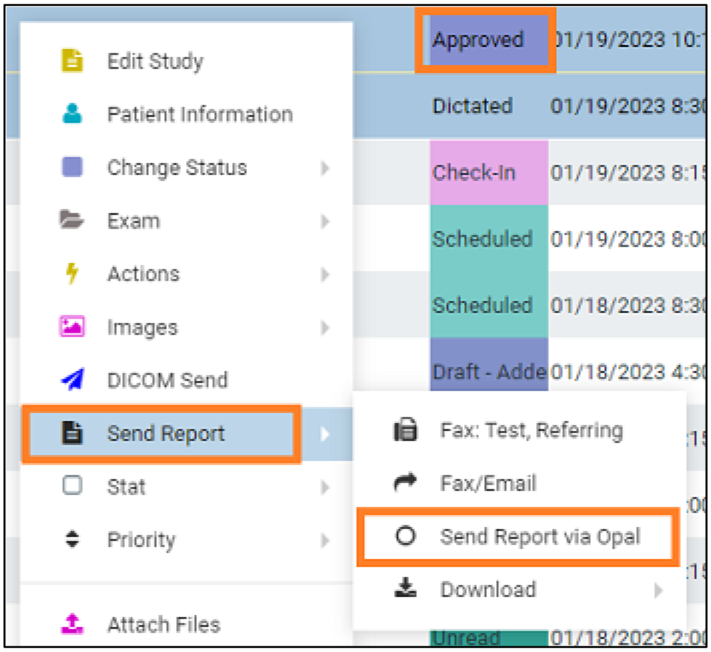
Send an approved report via Opal

You can send approved reports of DICOM studies to another Opal or Exa platform system. Use this method rather than DICOM-sending if you want to include the report status (such as Approved or Transcribed).

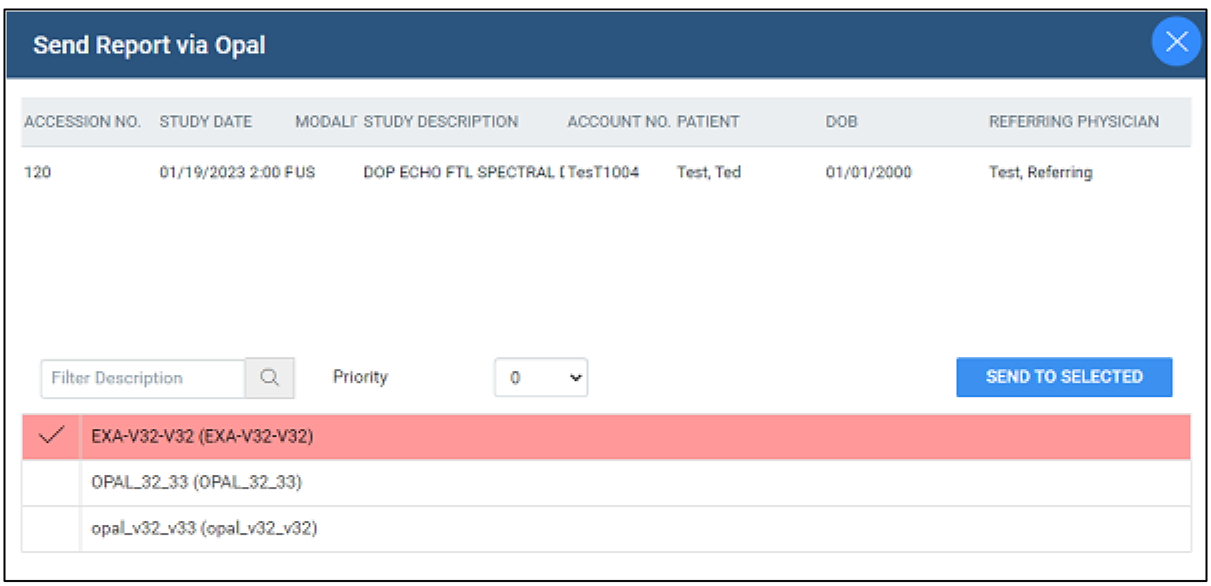
Prerequisites:

- Configure the referring physician on the sending server (your Symmetry PACS server) and receiving server. You may need to contact the receiving facility to confirm.
- Install OPAL tools.

Procedure

1. Worklist > right-click an approved study > Send Report > Send Report via Opal.
2. 

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.



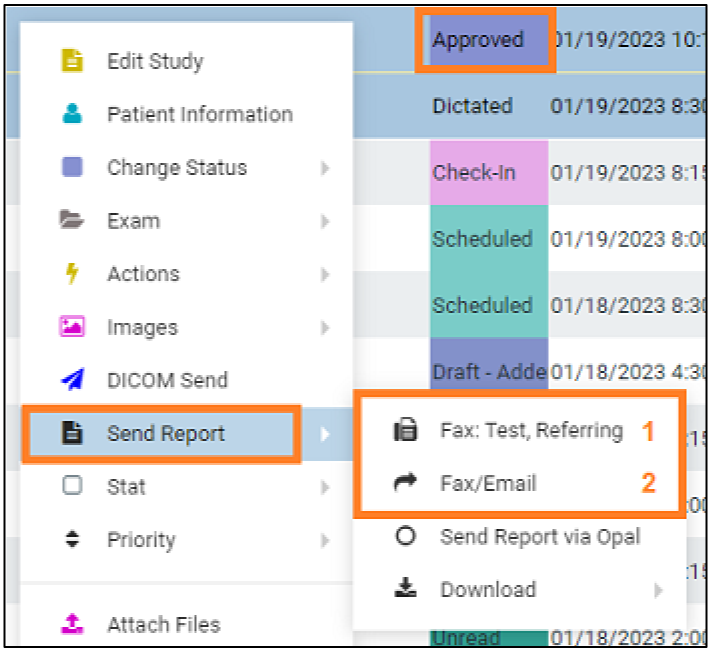
4. In the Priority dropdown list, select a priority.
5. Select send destinations in the list.
6. Select SEND TO SELECTED, or SEND TO ALL.

Send an approved report in a fax or email

You can send approved reports of DICOM studies in a fax or email.

Procedure

1. Worklist > right-click an approved study > Send Report.

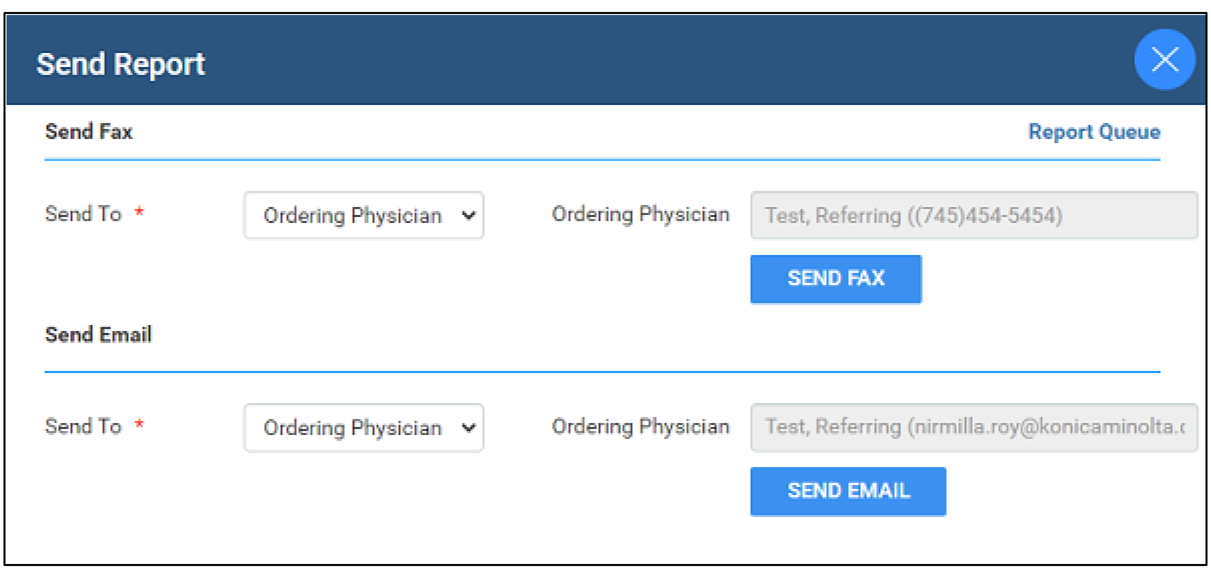


To fax to the default recipient (1), select it.

Result: The report is sent to the fax queue.

2. To send to selected recipients (2), select Fax/Email.

3. In the Send Report dialog, select recipients and then select the SEND FAX and/or SEND EMAIL button.



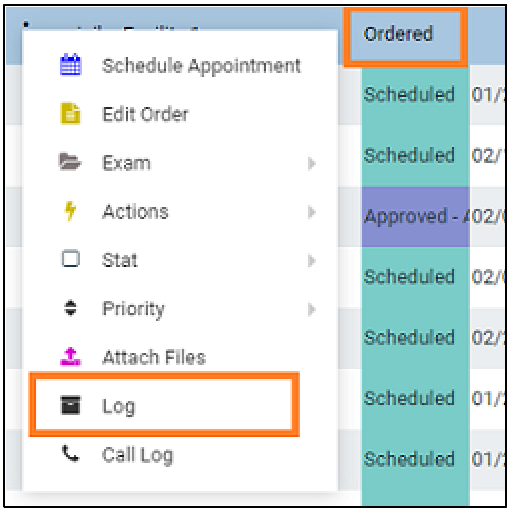
4. Optional. Repeat the previous step to send to additional recipients.

View and export audit log entries

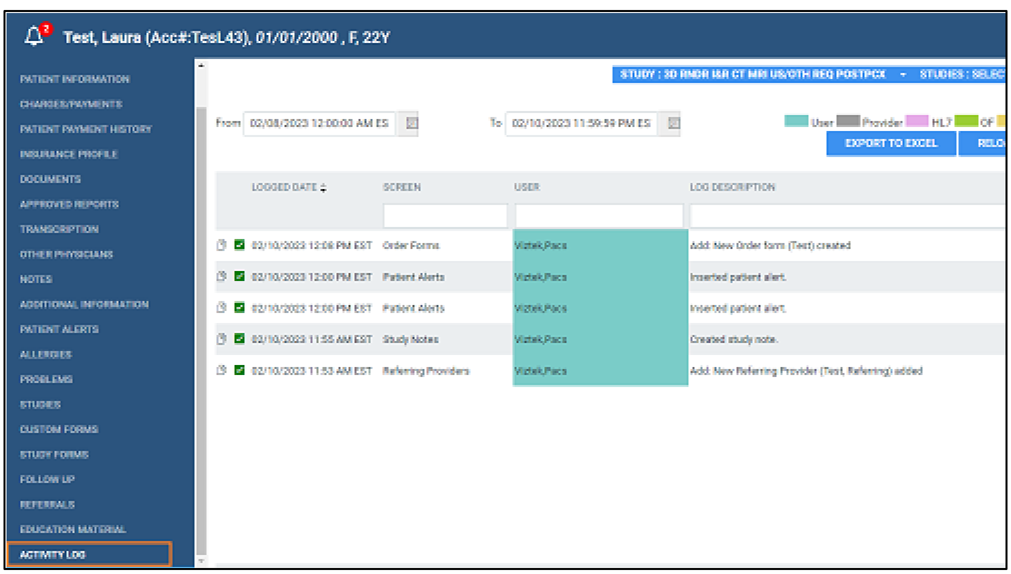
You can view audit log entries, and export them to an XLS file.

Procedure

1. [Worklist](#) > right-click an order or study > 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.

See also:

View activity logs

About linking patients

Two ways to handle duplicate patient records are linking and merging.

To *link 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 Add alternate account numbers to a patient chart.

To merge patient charts generally means to move studies, series, and images between patients.

Note: Linking patients is different from Linked Reporting.

See also:

Use alternate account numbers
Merge or split studies

Link patients

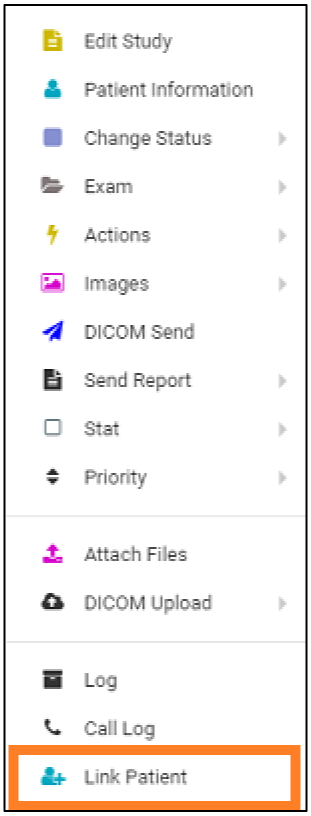
If a patient has multiple records, each with different account numbers (or MRNs or PIDs), you can link them from the worklist (see About linking patients).

Caution: Linking an external patient record to an internal one results in deleting the external record.

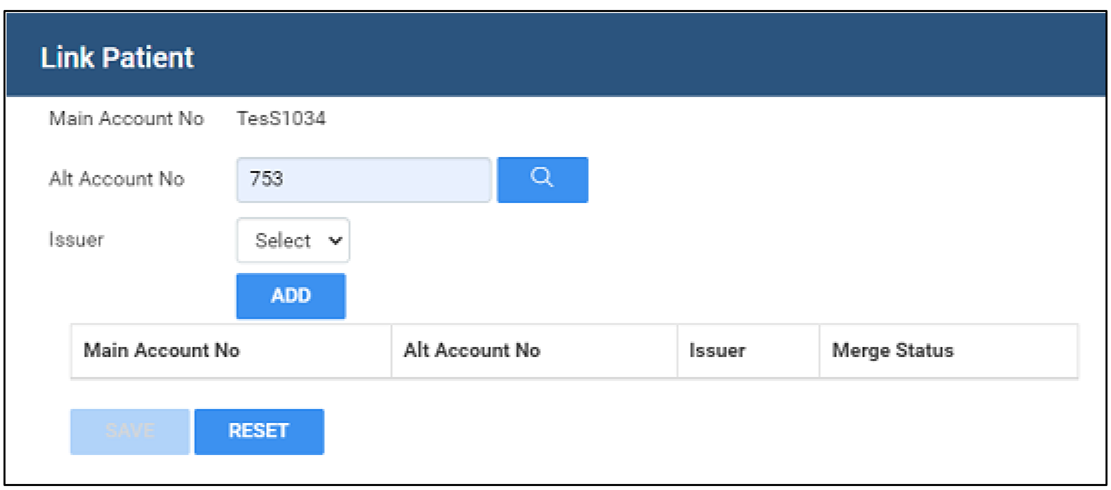
Prerequisite: Configure alternate account number functionality.

Procedure

1. Worklist > right-click an order or study > Link Patient.



2. In the Link Patient dialog, in the Alt Account No search box, enter 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.

Attach (upload, scan) non-DICOM documents

In various parts of the program you can *attach*, *upload*, and *scan* non-DICOM documents. All of these result in adding files to the DOCUMENTS section of the patient chart and the Edit Study screen, but differ slightly in procedure and scope.

Scan – Scan paper documents and add to a patients or studies.

Upload – Select existing document and add to patients or studies.

Attach – Open a screen from which you can upload or scan documents.

Prerequisite: Install Exa Scans

Procedure

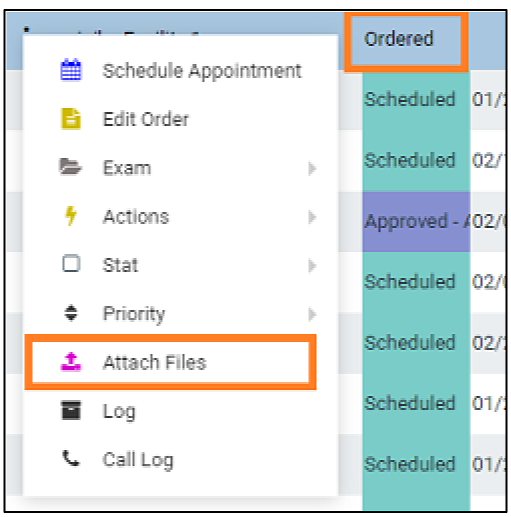
1. Choose one of the following:

From the worklist

- Worklist > right-click an order or study > Attach Files.
- Worklist > Edit Study screen > DOCUMENTS.

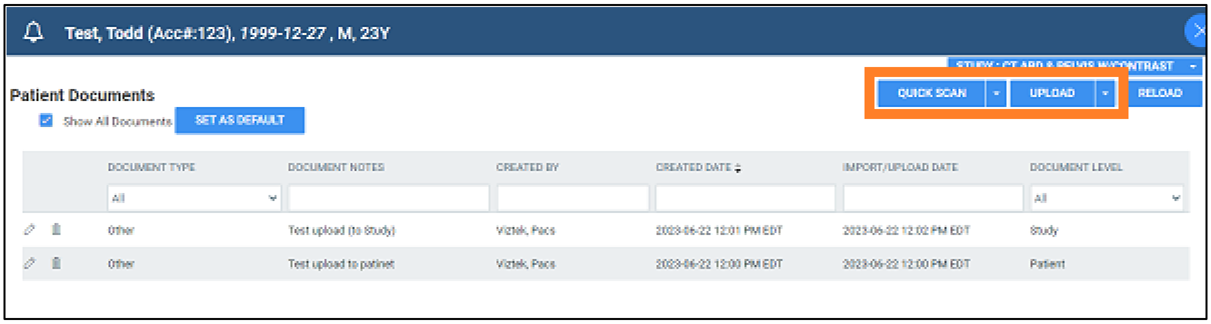
From the schedule book

- SCHEDULE > right-click an appointment block > Attach Files.

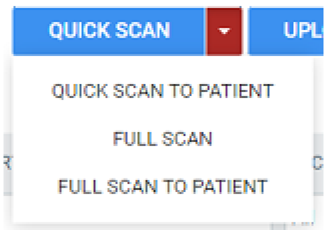


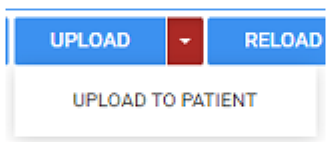
Examle: Using the worklist study row shortcut menu

Result: The Patient Documents screen appears:



2. In the upper-right, select one of the following options.

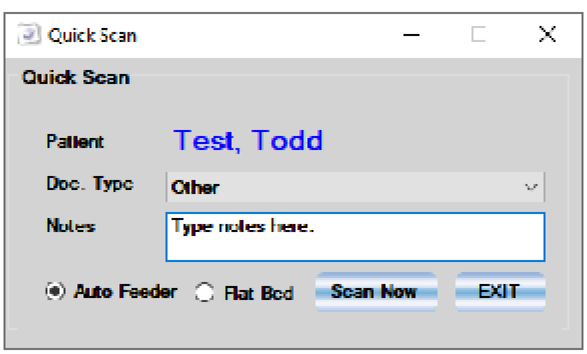




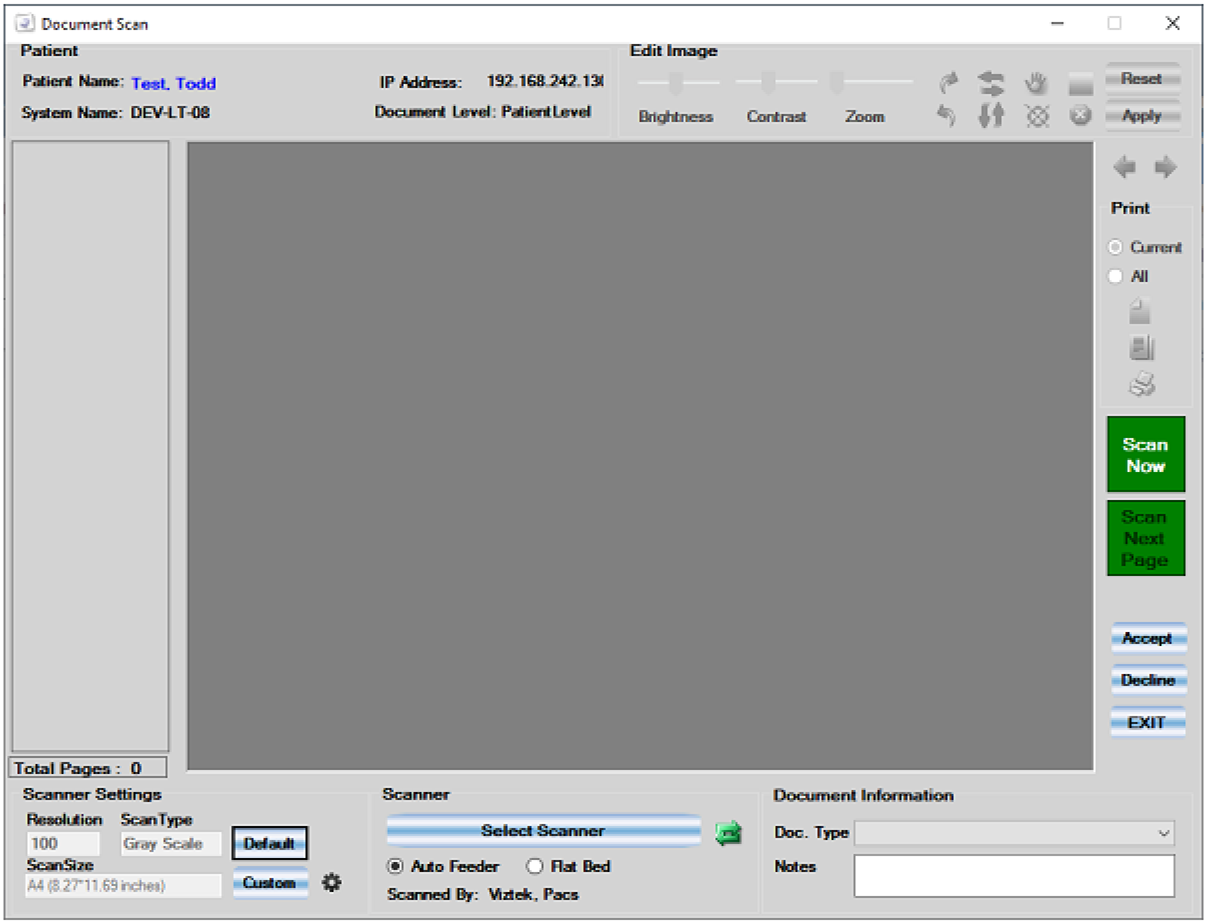
Setting	Process	Attach Document To
QUICK SCAN	Scan document with basic options	Study
QUICK SCAN TO PATIENT	Scan document with basic options	Patient
FULL SCAN	Scan document with full options	Study
FULL SCAN TO PATIENT	Scan document with full options	Patient
UPLOAD	Upload document	Study
UPLOAD TO PATIENT	Upload document	Patient

3. Based on your choice above:

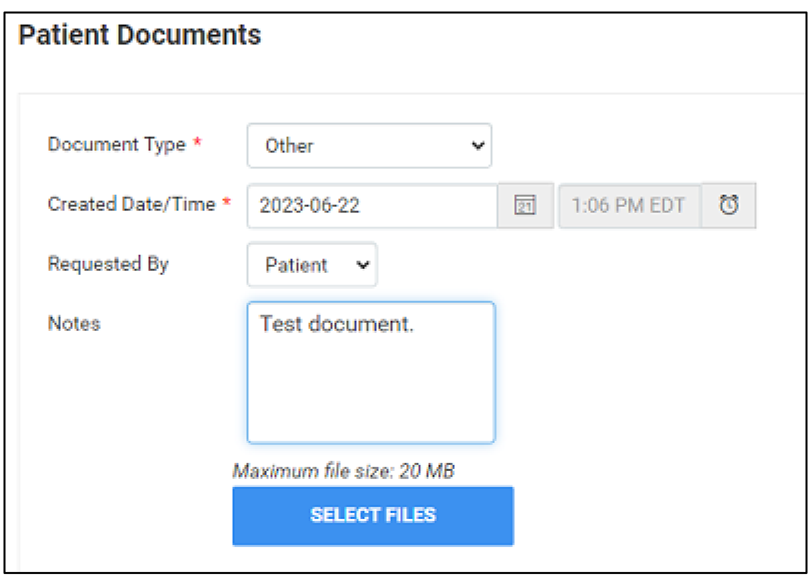
- For Quick (basic) scanning, select a document type, type notes, and then select Scan Now.



- For Full scanning, use the Document Scan screen to edit the image as needed, and then select Scan Now.



- For Uploading, select options, use SELECT FILES to browse for and select files to upload, and then select SAVE.



See also:

Attach (upload, scan) DICOM documents
Require document review

Attach (upload, scan) DICOM documents

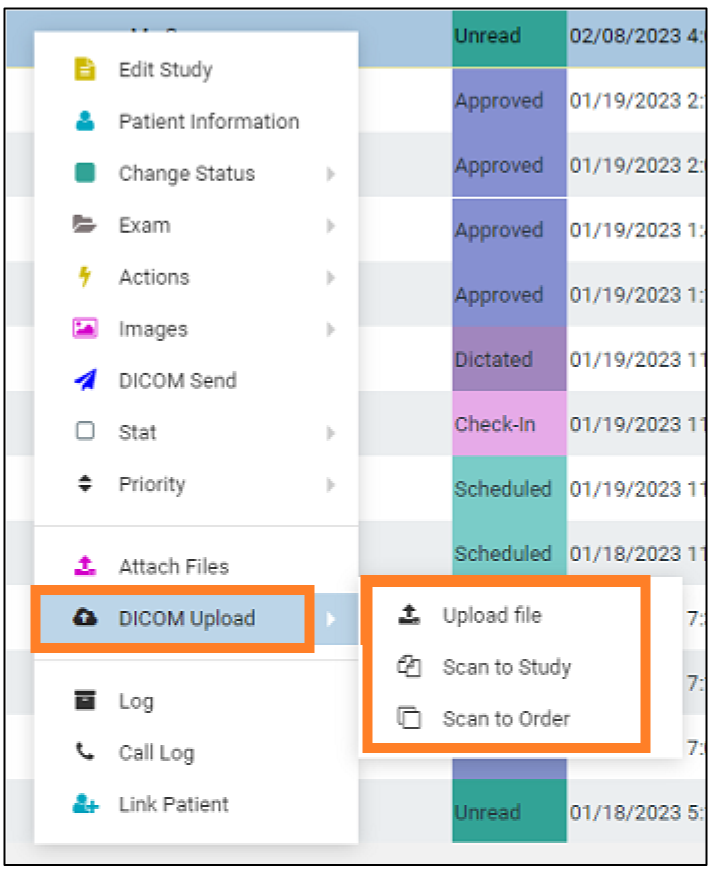
You can upload or scan files to DICOM format and add them to an order or study. Documents added in this way are available as secondary capture images in the Exa PACS/RIS viewer.

Prerequisite (scanning only): Install Exa Scans

Procedure

1. Choose one of the following:

- Worklist > right-click a DICOM study > DICOM Upload > Upload File.
- Worklist > right-click a DICOM study > DICOM Upload > Scan to Study.
- Worklist > right-click a DICOM study > DICOM Upload > Scan to Order.

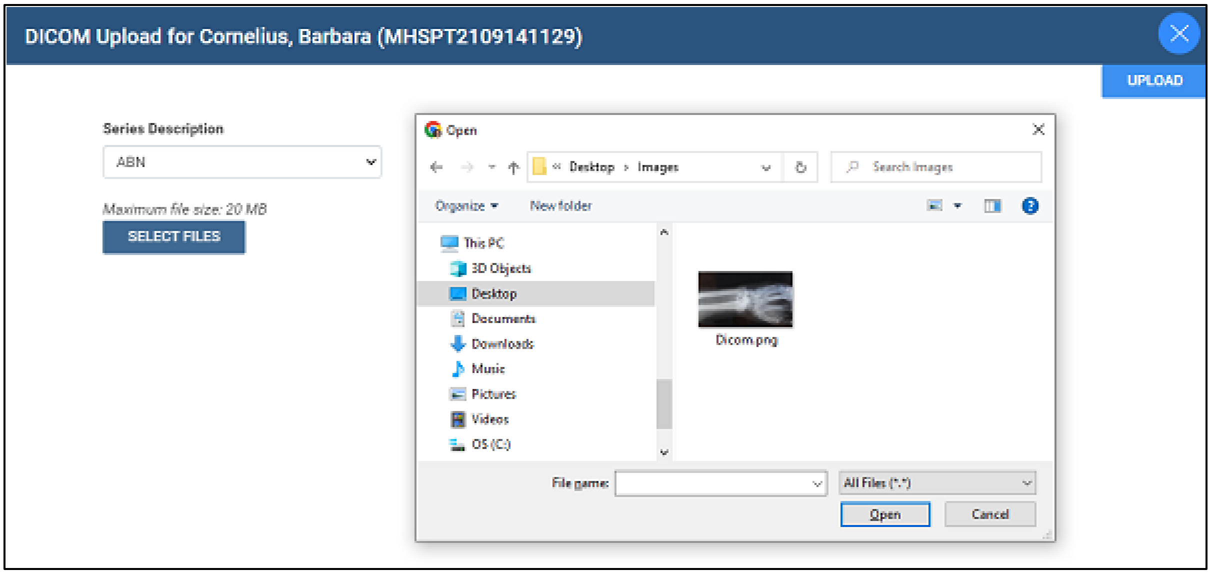


Setting	Process	Attach Document To
Upload file	Upload document, convert to DICOM	Patient
Scan to Study	Scan document, convert to DICOM	Study

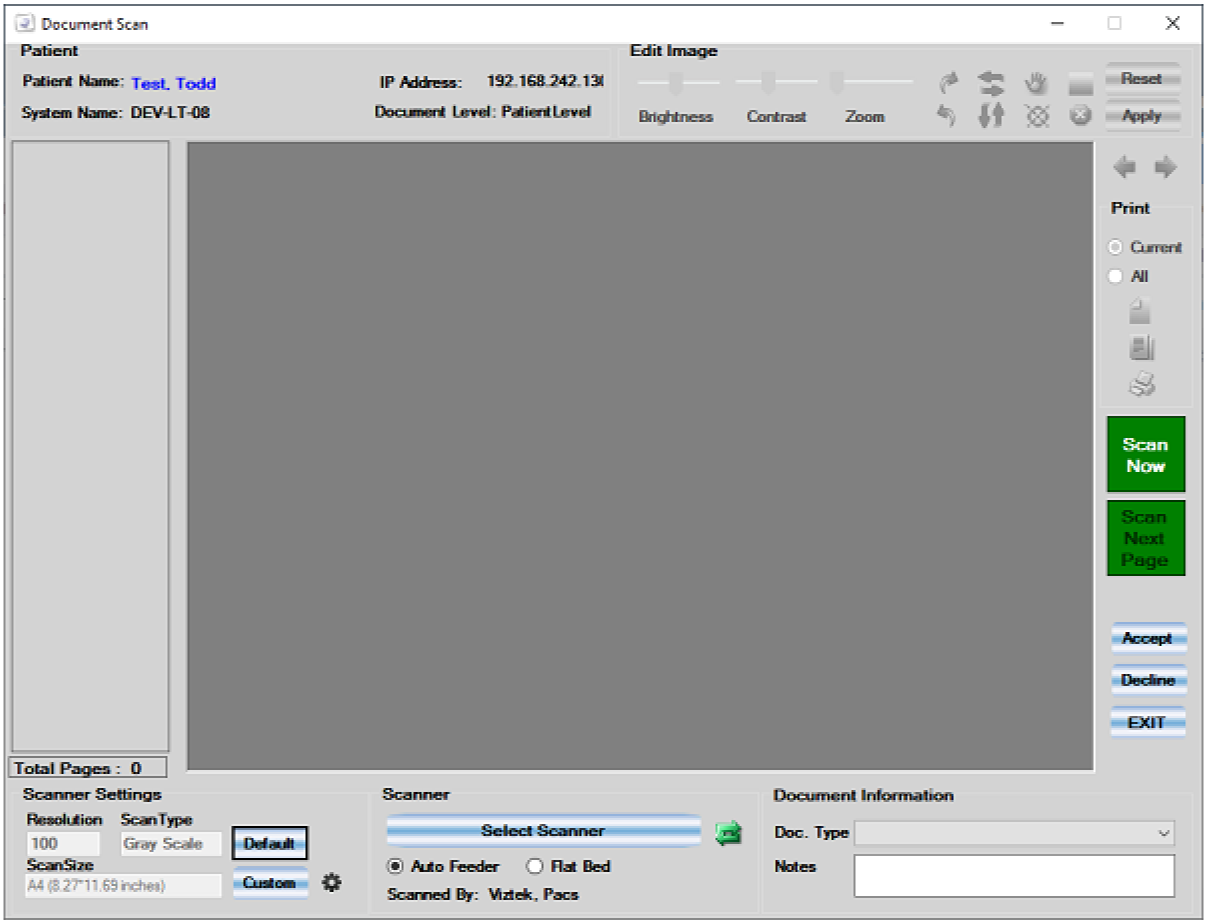
Setting	Process	Attach Document To
Scan to Order	Scan document, convert to DICOM	Order

2. Based on your choice above:

- For Uploading, select a series description, use SELECT FILES to browse for and select files to upload, and then select UPLOAD.



- Use the Document Scan screen to edit the image as needed, and then select Scan Now.



See also:

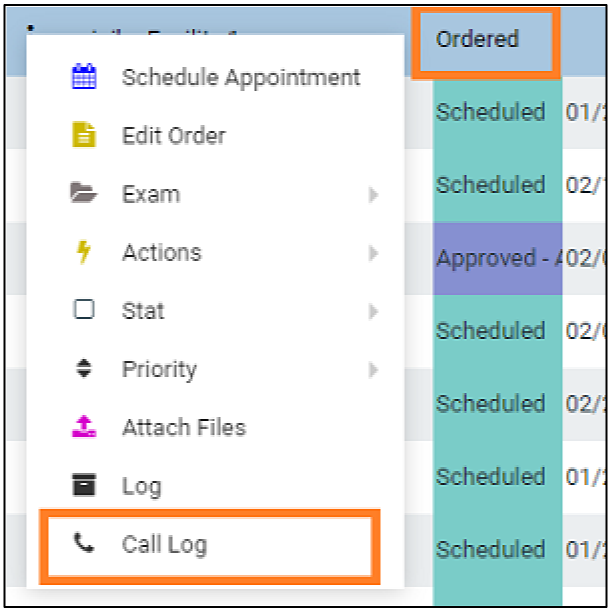
[Attach (upload, scan) non-DICOM documents]()
[Require document review]()

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.

Procedure

1. [Worklist]() > right-click a study or order > Call Log.



2. The Notes tab of the patient chart opens. See [Update the patient call log](#).

Edit Study screen

In the Edit Study screen (or *study chart*) you can view and edit most information about an order or study. For a list of topics in this chapter, see Topics on the Edit Study screen.

Open the Edit Study screen

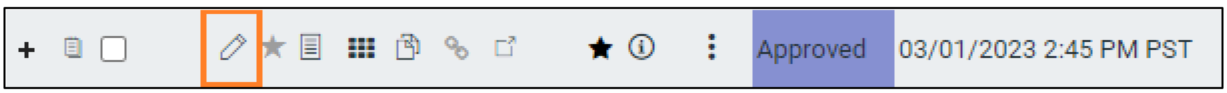
To open the Edit Study screen, follow the procedure below.

Caution:

- 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.
- For recommended security, please turn off Chrome autofill. A password and/or patient information is configured or used on this page.

Procedure

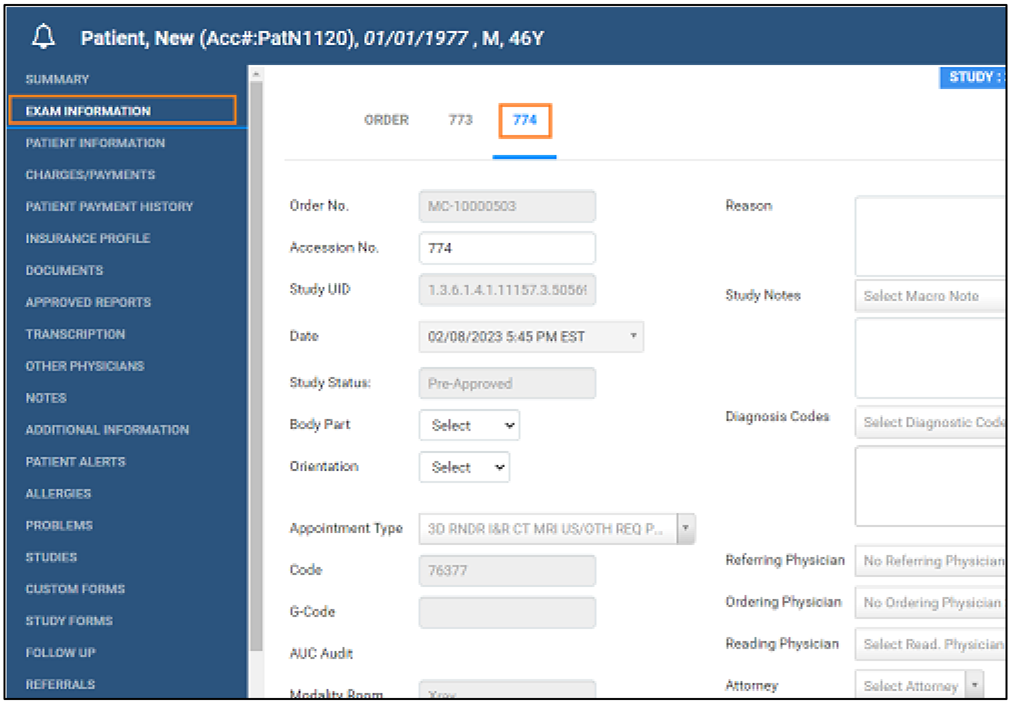
- On the Worklist ALL STUDIES tab, double-click study row or select Edit Study .



...OR

- On the Worklist PRE ORDERS tab, double-click an order row or select Edit Order .

Result: The Edit Study screen opens to the EXAM INFORMATION screen, with the most recent study sub-tab selected.



Topics on the Edit Study screen

This chapter (Edit Study screen) contains the following topics (not all topics may be available depending on version and region).

View patient alerts
View a summary of an order
Edit order information
Edit study information

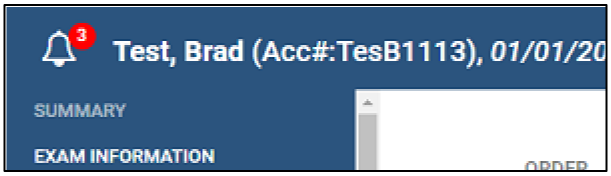
Edit basic patient demographics
Add or edit a patient’s portal account
View or add patient documents from Edit Study
View approved reports
Open the transcription screen
Manage other physicians
Enter notes and reasons for study
Update the patient call log
Enter employment and transfer-related information
Assign or remove patient alerts
View activity logs

View patient alerts

You can quickly check whether the patient of a study has any alerts that might affect billing, scheduling, exam preparation, or other factors.

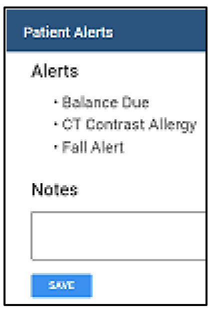
Procedure

1. Go to Worklist > Edit Study screen, and then select the alert button.



The number of alerts appears in red

Result: The Patient Alerts dialog box appears.



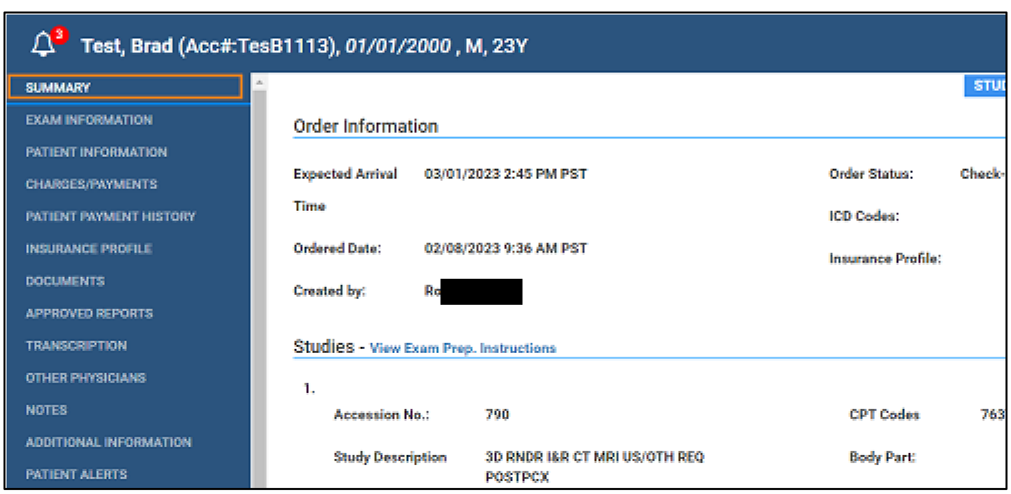
2. Optional: Enter notes and click SAVE.

View a summary of an order

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

Procedure

1. Go to Worklist > Edit Study screen, and then select SUMMARY.



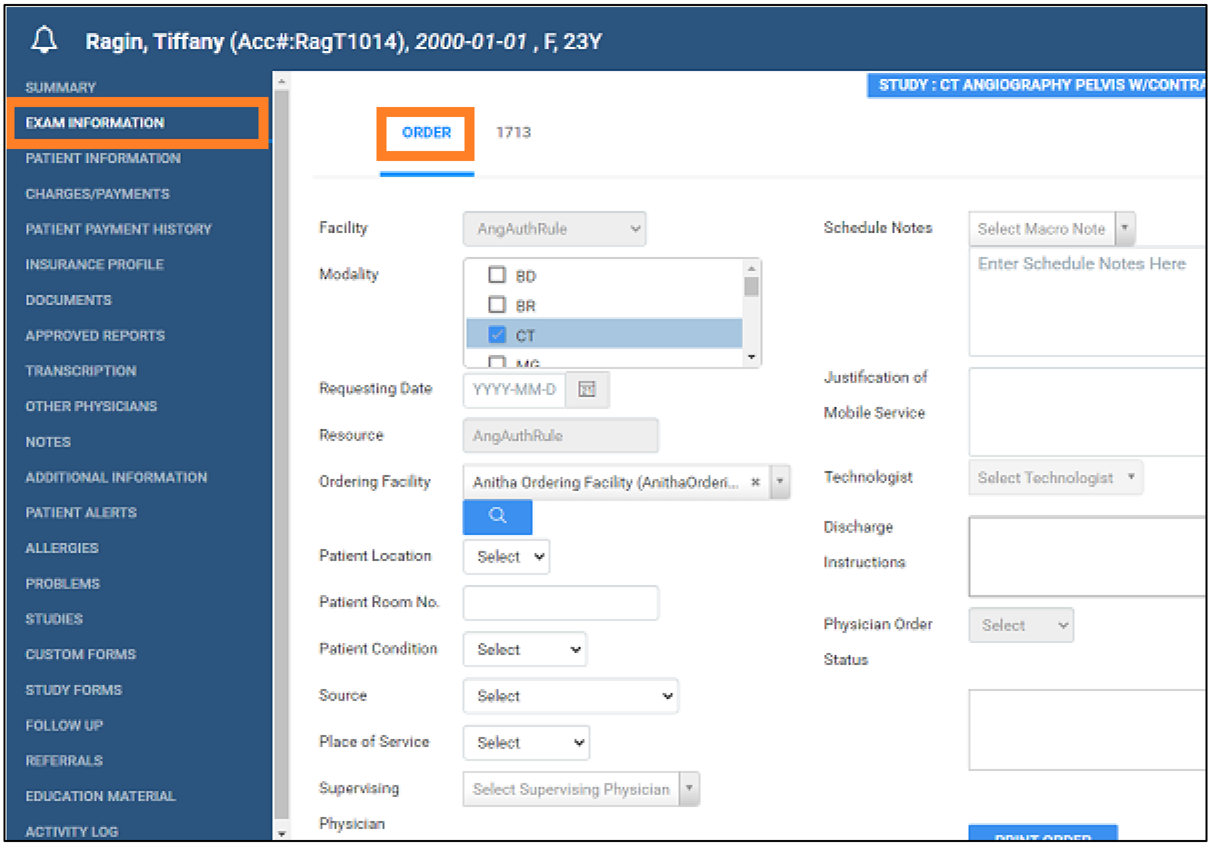
Result: The order summary appears in the right pane.

Edit order information

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

Procedure

1. Go to Worklist > Edit Study screen > EXAM INFORMATION, and then select the ORDER sub-tab.



Result: The Edit Order screen appears.

2. 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).
Requesting Date	The date requested for the order. Users with rights can edit this date.
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 facility location, select Set as Home Address.
Patient Location	Select the current location of the patient.

Setting	Description
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. Unavailable if both Mobile Billing and Mobile Rad are in use.
Discharge Instructions	Type any discharge instructions.
Physician Order Status	Status from the Physician portal. If the order was signed, the physician's signature appears in the box below the Physician Order Status dropdown list.
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 preconfigured disclaimer on the printed order 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.

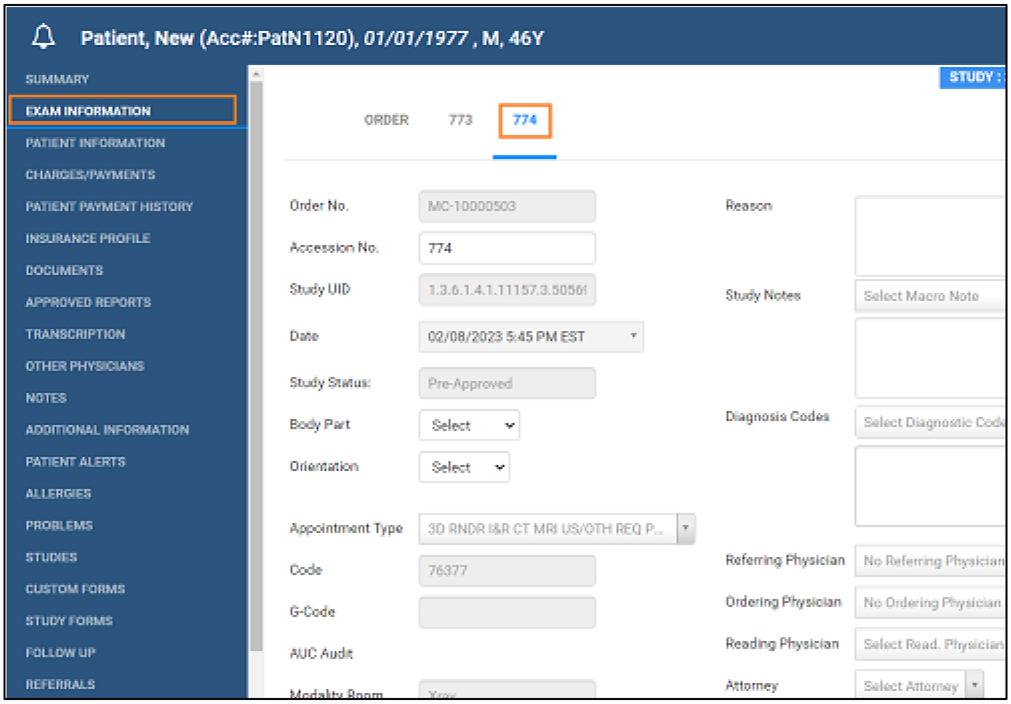
3. If DICOM settings are not available to edit, at the bottom of the screen, select DICOM STUDY, and then make changes to DICOM settings as needed.
4. To edit or add CPT codes, at the bottom of the screen, select the edit or add button, enter changes, and then select SAVE.
5. Select SAVE.

Edit study information

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

Procedure

1. Go to Worklist > Edit Study screen > EXAM INFORMATION, and then select a study sub-tab.



An order containing studies with accession numbers 773 and 774

2. 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. If available, you can select the provider button to view provider details.
Ordering Physician	Select the physician who ordered the study. If left blank, Symmetry PACS automatically enters the referring physician. If available, you can select the provider button to view provider details.

Setting	Description
Reading Physician	Select the radiologist or other physician who will read the study. If available, you can select the provider button to view provider details.
Attorney	Select the attorney for the patient. This attorney is given access to the study through Attorney Portal. If available, you can select the provider button to view provider details.
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.

3. 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.

4. To edit or add CPT codes, at the bottom of the screen, select the edit or add button, enter changes, and then select SAVE.

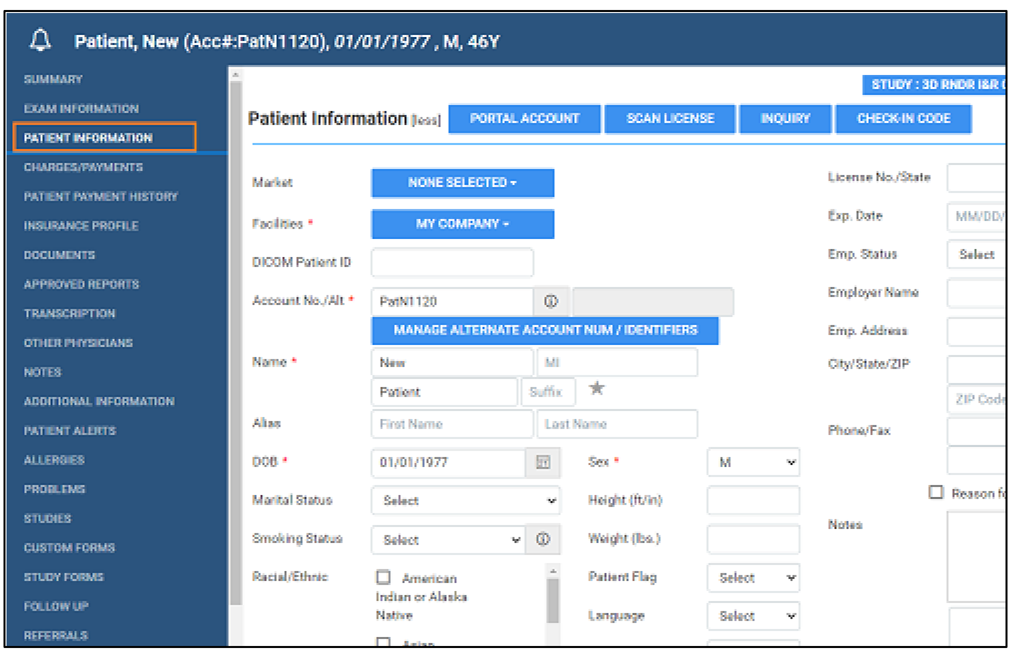
5. Select SAVE.

Edit basic patient demographics

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

Procedure

1. Go to Worklist > Edit Study screen > PATIENT INFORMATION.



2. Make changes, and then select SAVE.

See also:

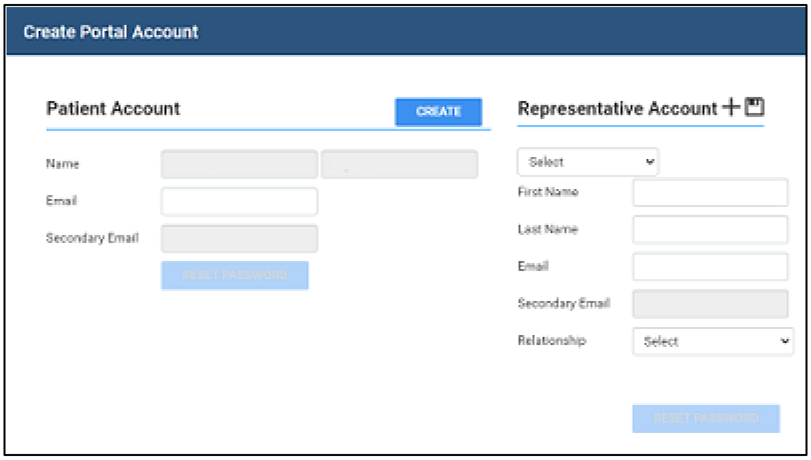
Create and modify a patient chart

Add or edit a patient's portal account

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

Procedure

1. Go to Worklist > Edit Study screen > PATIENT INFORMATION > PORTAL ACCOUNT.



Create a patient account

1. In the Create Portal Account dialog, under Patient Account, type the patient's email address, and then click CREATE.

   Result: An email is sent to the patient to verify and finalize their patient portal account.

2. Click SAVE.

Create a representative account

- Under Representative Account, fill in the options and click the save button.

  Result: A email is sent to the representative to verify and finalize their patient portal account.

Assign a representative account

If you created more than one representative, you can select which one to assign to the current patient.

- Under Representative Account, select the account in the dropdown list and then click the save button.

Edit a representative account

1. Under Representative Account, select the account in the dropdown list.

2. Change information as needed, and then click the plus + button.

Reset passwords

After an account is verified, you can reset the password.

> Caution: A password is configured or used on this page. For recommended security, turn off Chrome autofill.

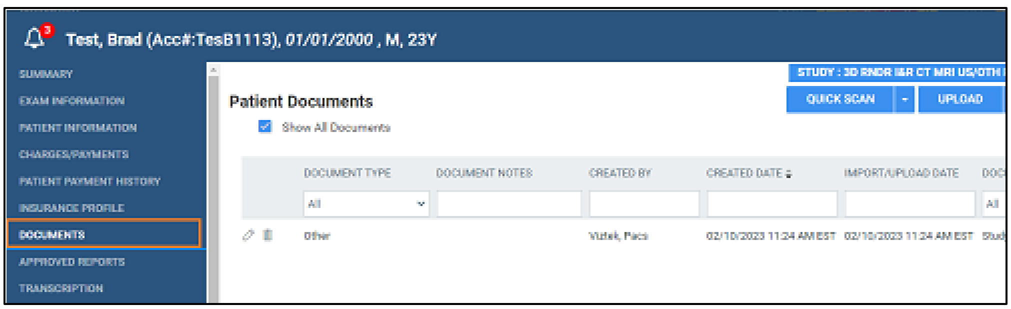
1. Under Patient Account or Representative Account, click RESET PASSWORD.
2. Type a new password, and click the corresponding Save button.

View or add patient documents from Edit Study

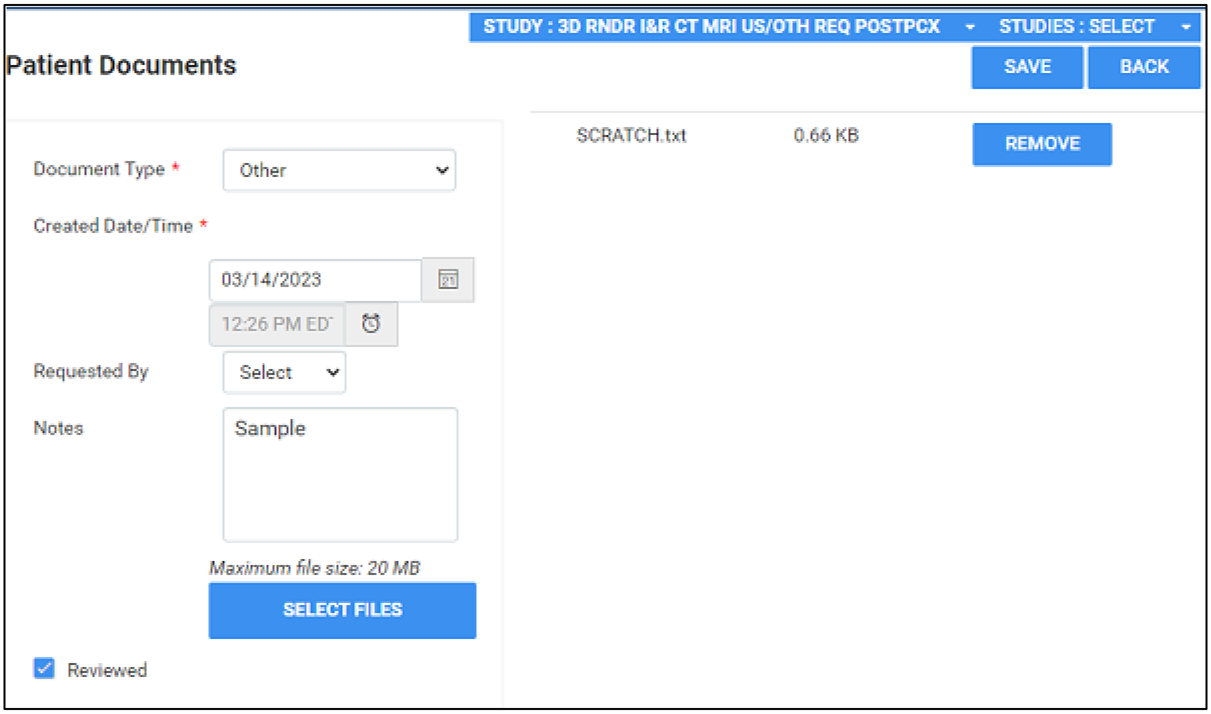
You can view all documents attached to a patient record and their metadata, and add new documents.

Procedure

1. Go to Worklist > Edit Study screen > DOCUMENTS.



2. To view a document in the list, double-click it.
3. To review a document, open a document in the list and select the Reviewed check box (see Require document review).
4. To add a document by scanning, place the document in the scanner, and do one of the following.
   - To scan one page without scanning options, select QUICK SCAN.
   - To scan with scanning options, select the QUICK SCAN arrow button, and in the shortcut menu, select a scan type.
5. To upload the document to RIS, select UPLOAD. To add document to the patient chart, select the arrow button for and select Patient Document.



- Enter metadata for the document.
- Select SELECT FILES, browse for and select a file, and then select Open.

6. Select SAVE.

See also:

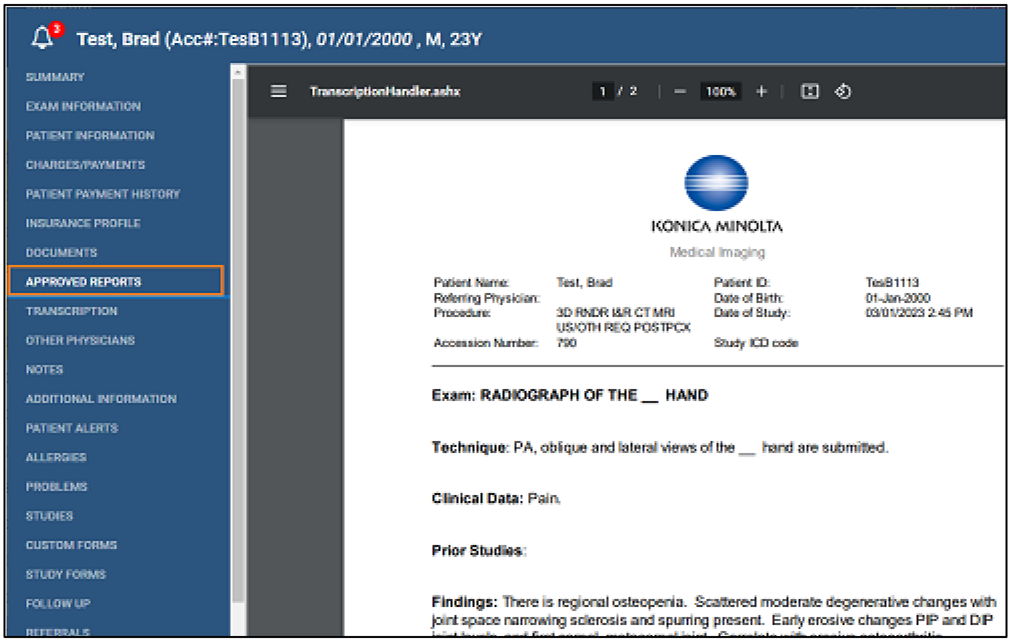
Attach (upload, scan) non-DICOM documents
Attach (upload, scan) DICOM documents

View approved reports

Procedure

1. Go to Worklist > Edit Study screen > APPROVED REPORTS to open a window and display the report.

   Result: If an approved report is available, it opens (may take time).

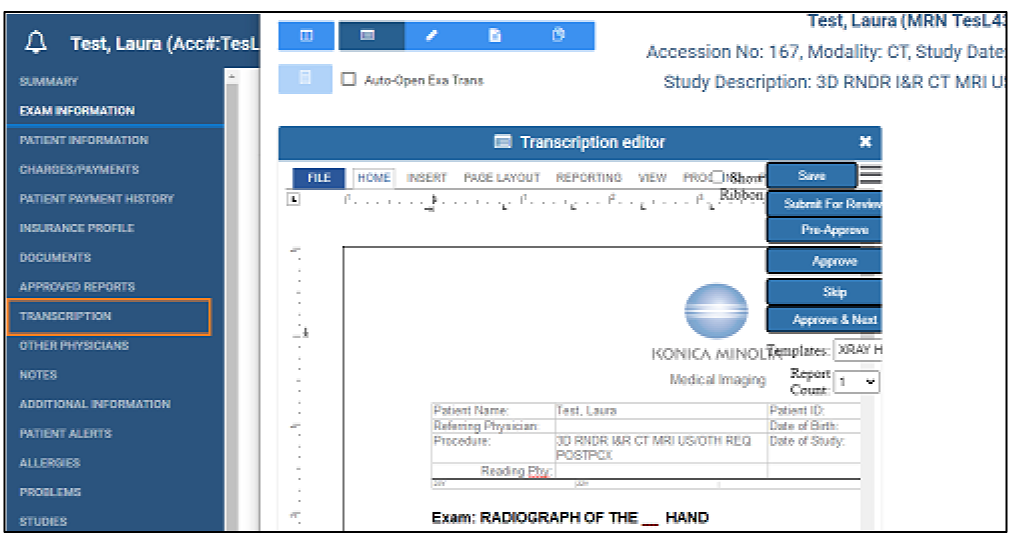


Open the transcription screen

Often you open transcription from the worklist, but you can also open the transcription multipanel from the Edit Study screen.

Procedure

1. Go to Worklist > Edit Study screen > 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

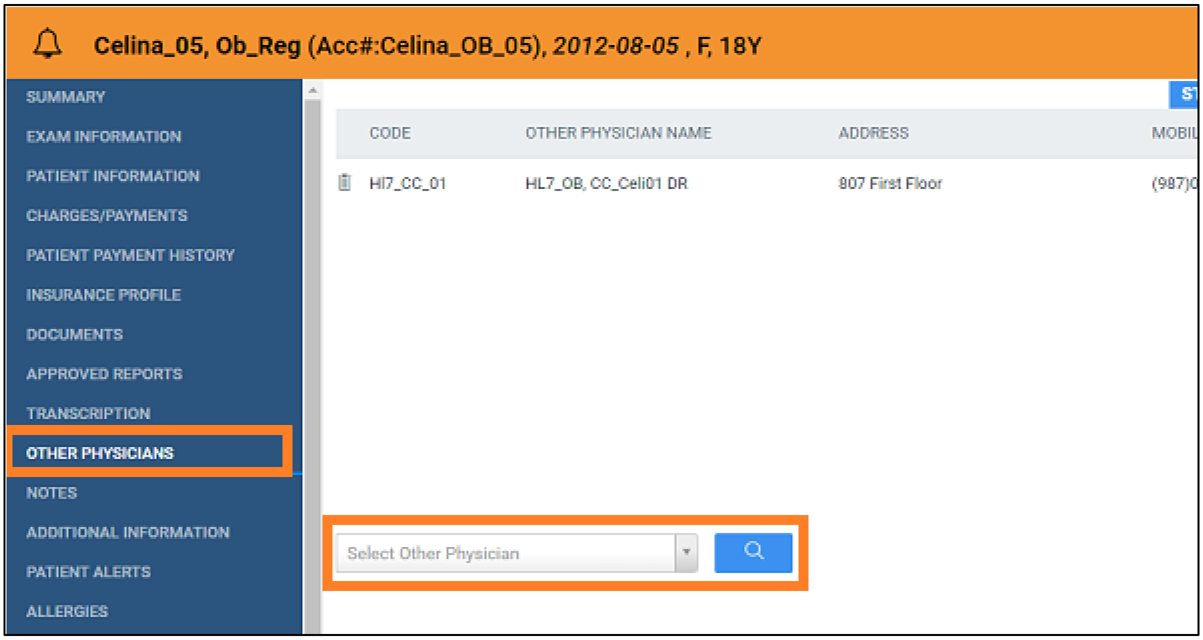
Dictation and transcription with Exa Voice and Exa Trans

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.

Procedure

1. Go to Worklist > Edit Study screen > OTHER PHYSICIANS.



2. Optional. To add a physician, in the Select Other Physician dropdown list, select a physician.

3. Optional. To remove a physician, select the trash  button.

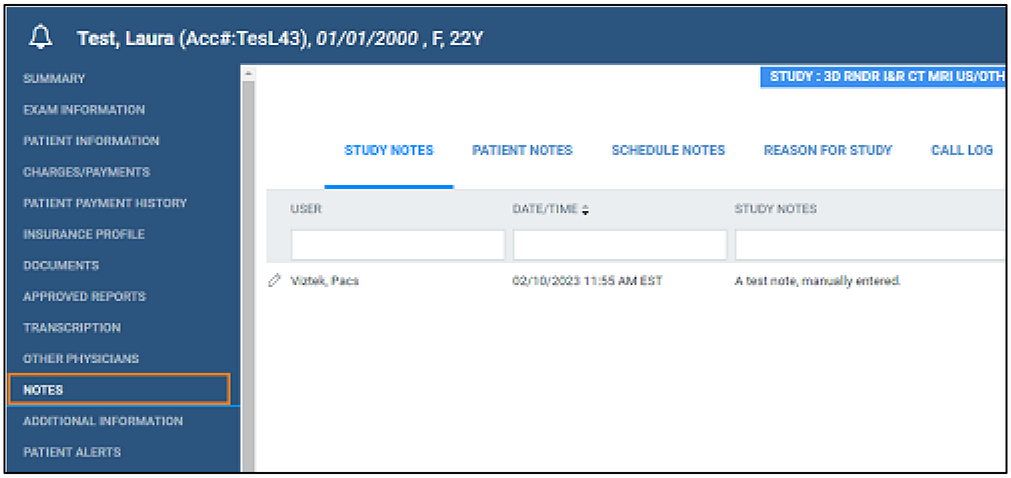
Enter notes and reasons for study

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.

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

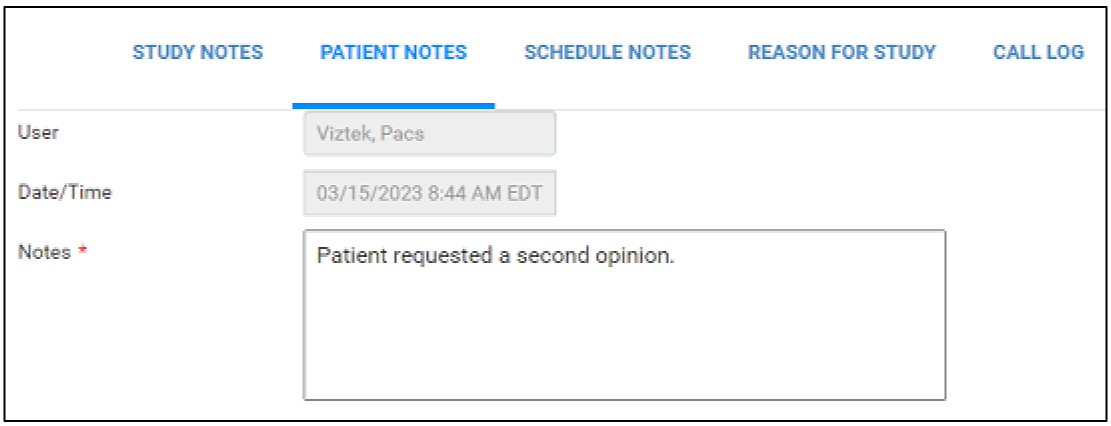
Procedure

1. Go to Worklist > Edit Study screen > NOTES.

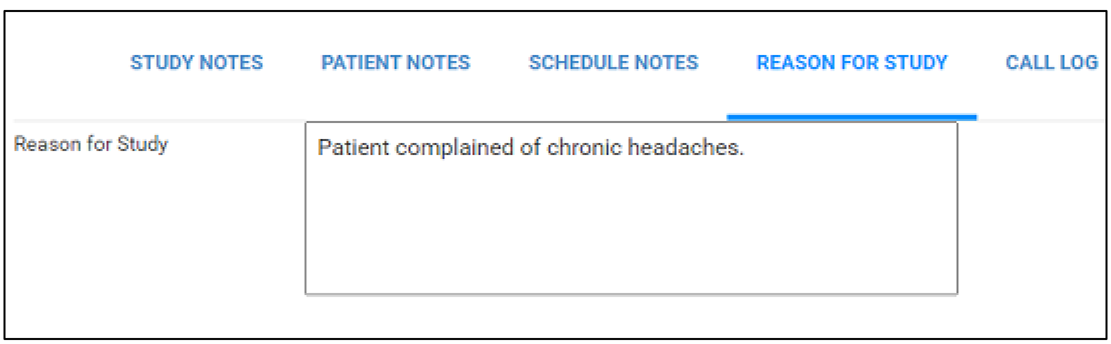


2. Select the PATIENT NOTES, STUDY NOTES, or SCHEDULE NOTES sub-tab.

3. Select ADD, type notes, and then select SAVE.



4. Select the REASON FOR STUDY tab.



5. Type reasons in the box, and then select SAVE.

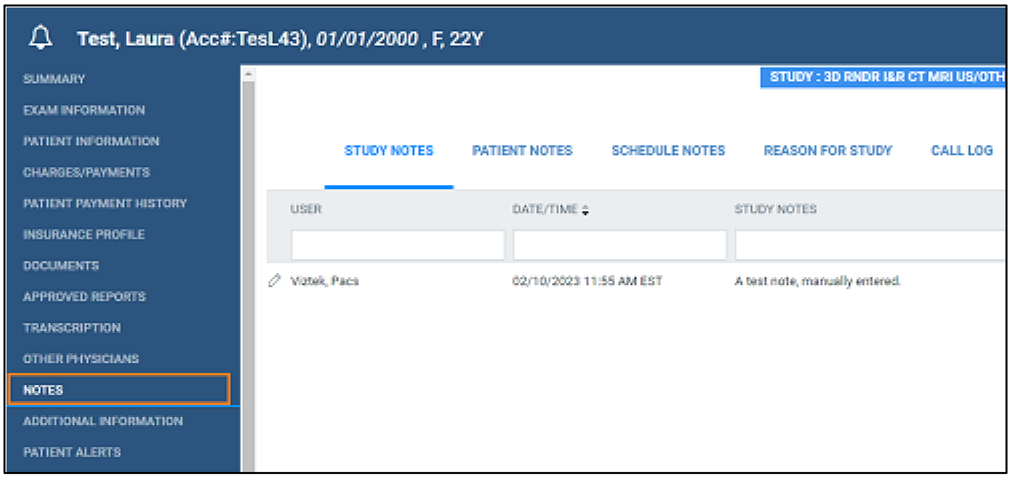
Update the patient call log

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:

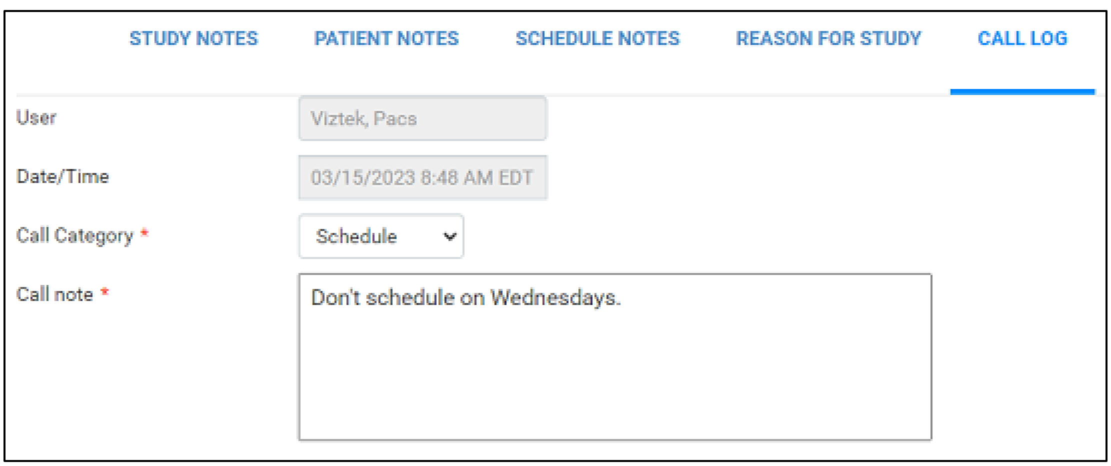
Prerequisite: Add call categories (see App settings).

Procedure

1. Go to Worklist > Edit Study screen > NOTES.



2. On the CALL LOG sub-tab, select ADD.



3. In the Call Category dropdown list, select a call category.

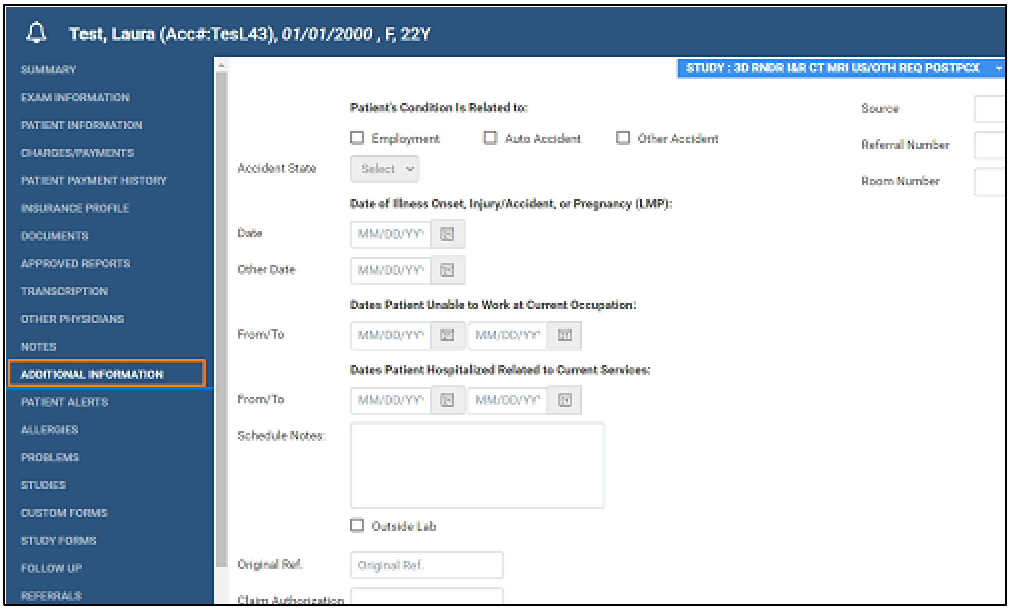
4. In the Call Note box, type notes, and then select SAVE.

Enter employment and transfer-related information

You can enter various information on whether a patient's 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.

Procedure

1. Go to Worklist > Edit Study screen > ADDITIONAL INFORMATION.



2. Enter the information as needed and then select SAVE.

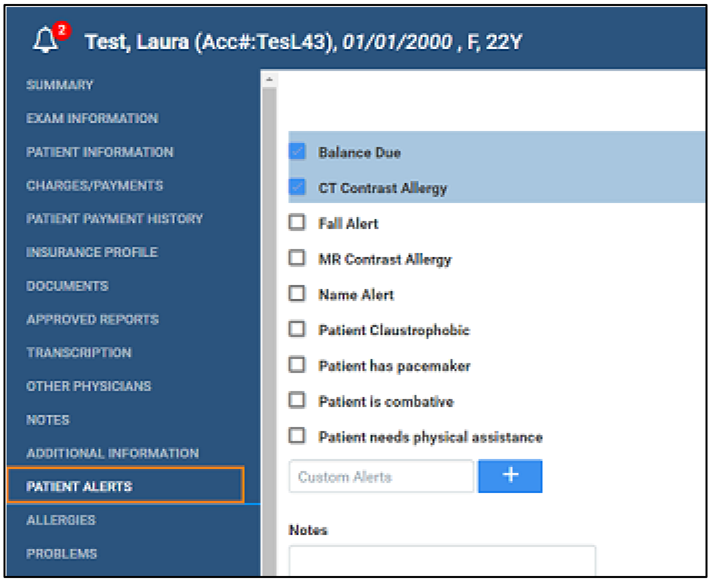
Assign or remove patient alerts

Patient alerts are important notices to staff regarding a patient. You can assign or remove alerts for a patient.

Caution: Failure to add a needed patient alert could result in incorrect treatment or diagnosis.

Procedure

1. Go to Worklist > Edit Study screen > PATIENT ALERTS.



2. Select or clear the checkboxes corresponding to the alerts that you want to assign or remove.

3. Optional. To create a new alert, type it in the Custom Alerts box and then select the plus + button.

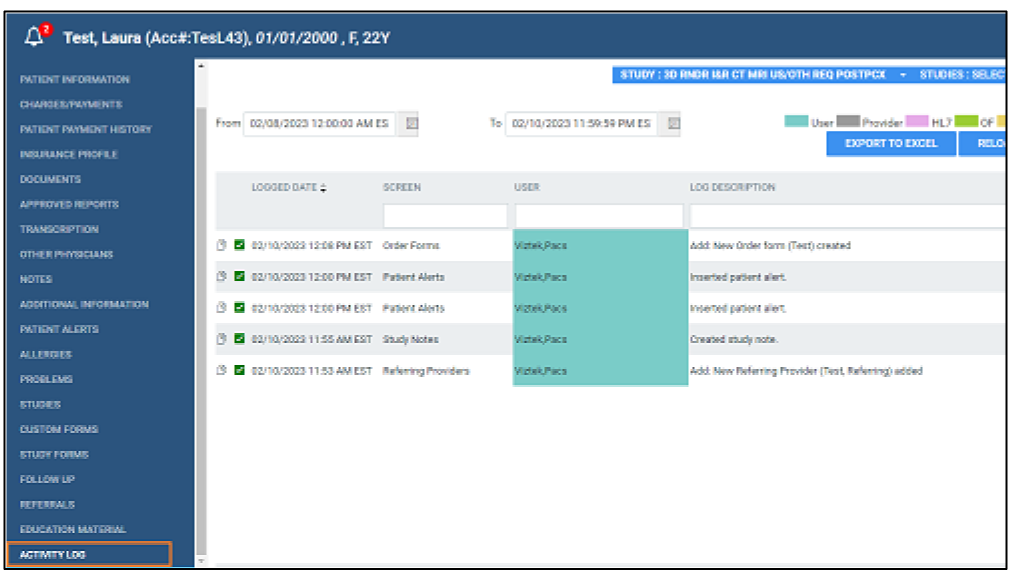
4. Select SAVE.

View activity logs

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

Procedure

1. Go to [Worklist](#) > [Edit Study screen](#) > ACTIVITY LOG.



2. Change the range of dates to filter the activity that you want to view.

3. To view details of an entry, double-click the entry.
4. Optional. To export the longs, select EXPORT TO EXCEL.

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. If no conflicts are found, the studies are automatically moved to the worklist (this is knows as the "QC-to-Live" process). If conflicts are found, the studies remain on the QC tab for you to reconcile.

The following topics in this section describe how to use the QC tab and reconcile these conflicts.

Prepare the QC tab
Reconcile conflicts by matching to a RIS order
Reconcile conflicts by manually editing demographics
Reconcile conflicts by creating an order
Move QC studies to the All Studies tab

See also:

Understanding receiver rules

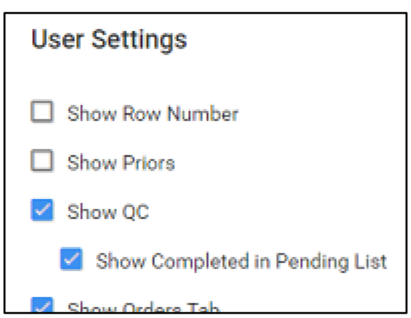
Prepare the QC tab

When received studies fail to match receiver rules or studies in the database, they appear on the QC tab of the worklist. To find conflicts needing reconciliation more easily, you can sort studies in the QC tab of the worklist by their QC status.

Prerequisite: Obtain QC user rights.

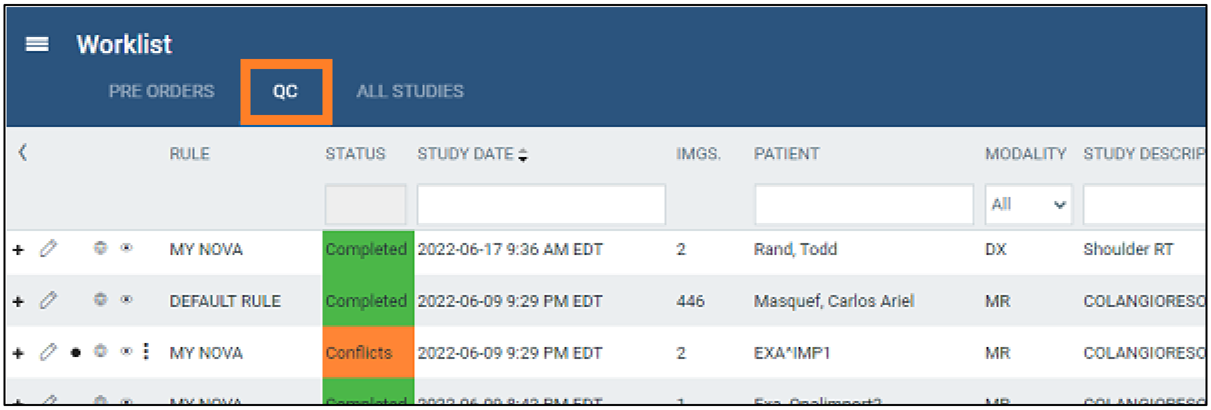
Procedure

1. Go to Worklist > Settings > User Settings.
2. Under User Settings, select Show QC.



3. To show exams in *Completed* status, select Show Completed in Pending List.

   To show exams in *Conflict* status only, clear the checkbox.
4. Select SAVE.
5. On the worklist, select the QC tab.



6. On the search bar, click inside the STATUS box.
7. Select a status (such as “Conflicts”) and select APPLY FILTER.

See also:

[Reconcile conflicts by matching to a RIS order](#)
[Reconcile conflicts by manually editing demographics](#)
[Reconcile conflicts by creating an order](#)
[Move QC studies to the All Studies tab](#)

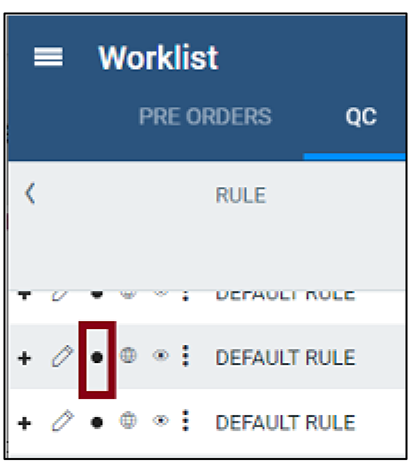
Reconcile conflicts by matching to a RIS order

When received studies fail to match receiver rules or studies in the database, they appear on the QC tab of the worklist. To reconcile conflicts, start by trying to match the conflicting study to a RIS order.

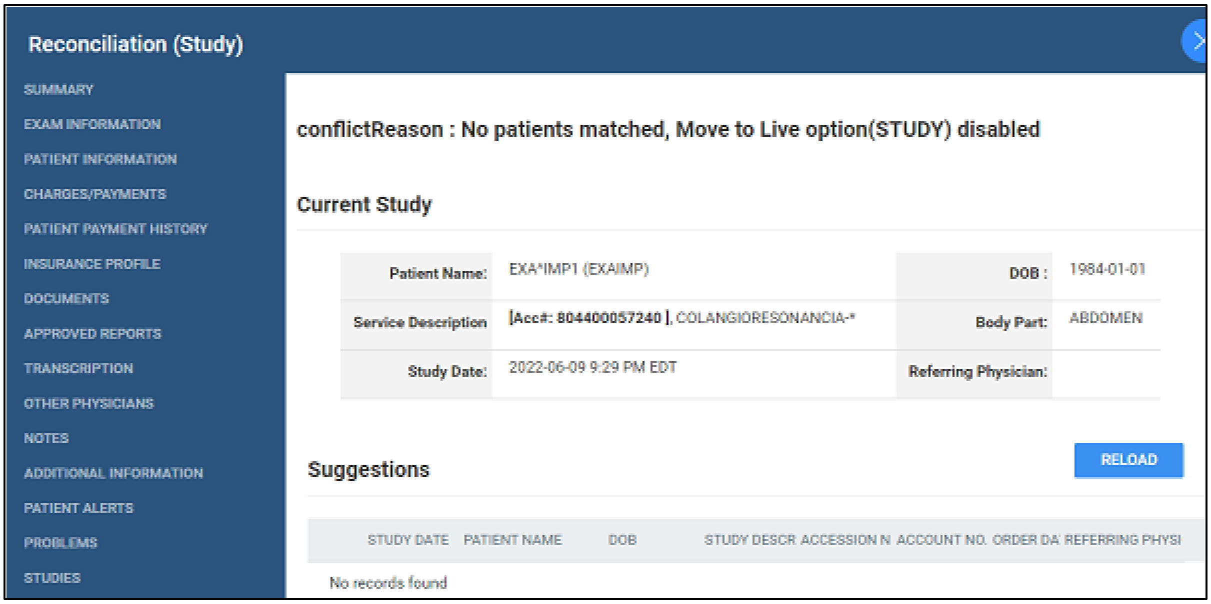
Prerequisite: [Prepare the QC tab](#).

Procedure

1. On the worklist QC tab, find a study whose status is Conflicts, and select the "reconciliation dot."

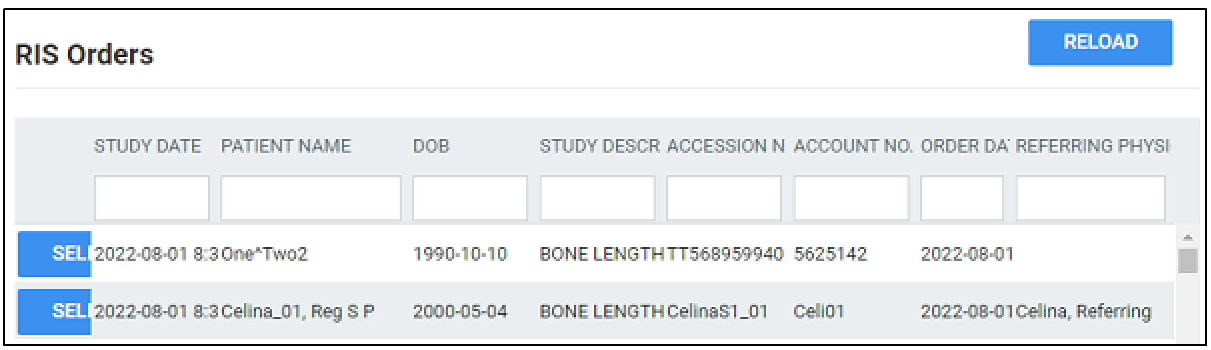


2. In the Reconcile dialog, under Suggestions, if an order in the list matches the Current Study, select its SELECT button, and then select OK. If no suggestion matches, skip to the next step.



3. Under RIS Orders, search for more potential matches by typing criteria in the search boxes. If a match is found, select its SELECT button and continue as above.

4. Hint: Find patients in your EHR or other sources for possible matches.



5. On the QC tab, right-click the study and select Reprocess.

6. Confirm that the study no longer has a status of Conflicts.

See also:

[Reconcile conflicts by manually editing demographics](#)
[Reconcile conflicts by creating an order](#)
[Move QC studies to the All Studies tab](#)

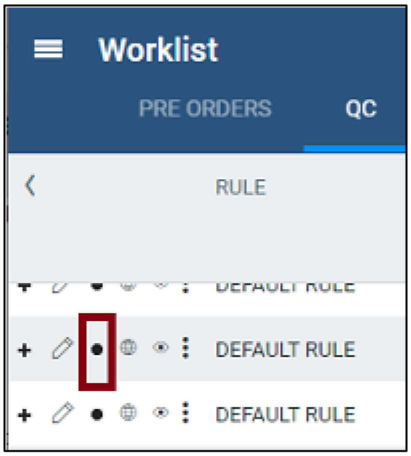
Reconcile conflicts by manually editing demographics

When received studies fail to match receiver rules or studies in the database, they appear on the QC tab of the worklist. If the conflict reason on screen is Multiple matches/Account# conflicts for patients, you can edit the demographics of the conflicting study to match a patient in the Exa PACS/RIS database, or vice versa (edit a patient in the database to match the conflicting study).

Prerequisite: [Prepare the QC tab](#).

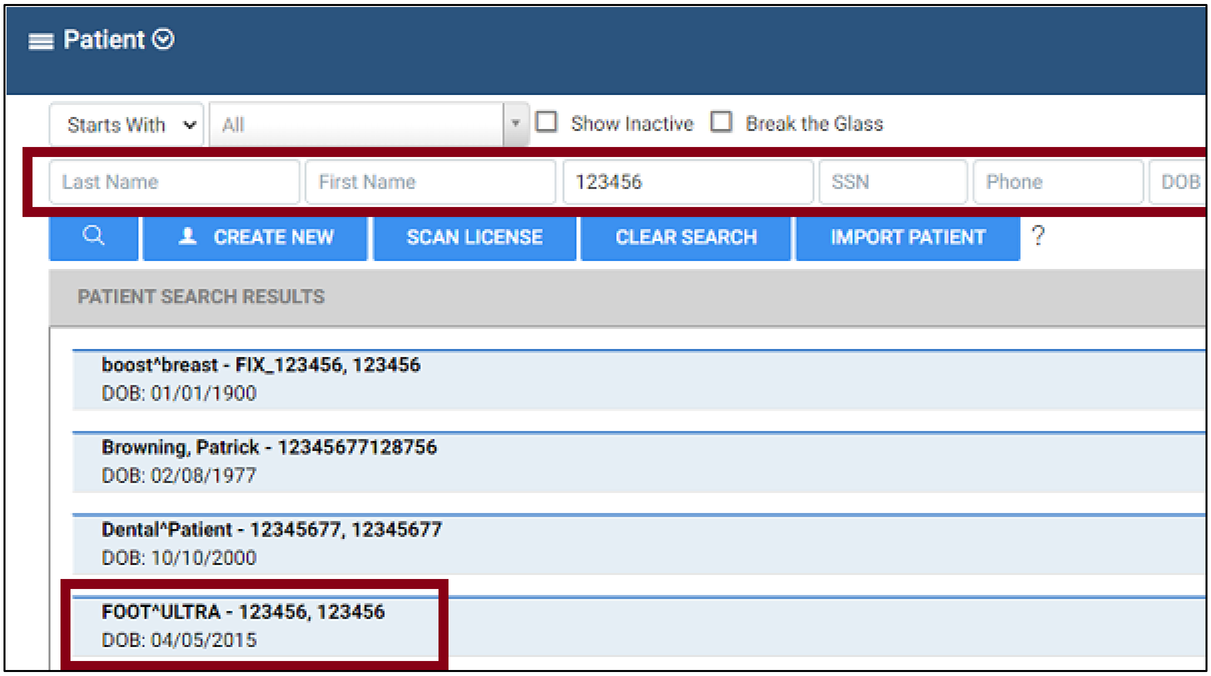
Procedure

1. On the worklist QC tab, find a study whose status is Conflicts, and select the "reconciliation dot."



2. In Chrome, open another instance of Exa PACS/RIS, and on the burger  menu, select PATIENT.
3. Search for a patient chart that is likely to be the match for the conflicting study.

   Hint: Find patients in your EHR or other sources for possible matches.



In the example, the MRN matches multiple studies -- select the correct one

4. Open the likely matching chart, edit demographics as necessary, and then select SAVE.
5. On the QC tab, right-click the study and select Reprocess.
6. Confirm that the study no longer has a status of Conflicts.

See also:

[Reconcile conflicts by matching to a RIS order]
[Reconcile conflicts by creating an order]
[Move QC studies to the All Studies tab]

Reconcile conflicts by creating an order

When received studies fail to match receiver rules or studies in the database, they appear on the QC tab of the worklist. 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: Prepare the QC tab.

Procedure

1. On the worklist QC tab, find a study whose status is Conflicts.

   Write down the key information from the study that you would need to create an order (patient demographics, MRN, study information, etc.).

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. On the QC tab, right-click the study and select Reprocess.
6. Confirm that the study no longer has a status of Conflicts.

See also:

[Reconcile conflicts by matching to a RIS order](#)
[Reconcile conflicts by manually editing demographics](#)
[Move QC studies to the All Studies tab](#)

Move QC studies to the All Studies tab

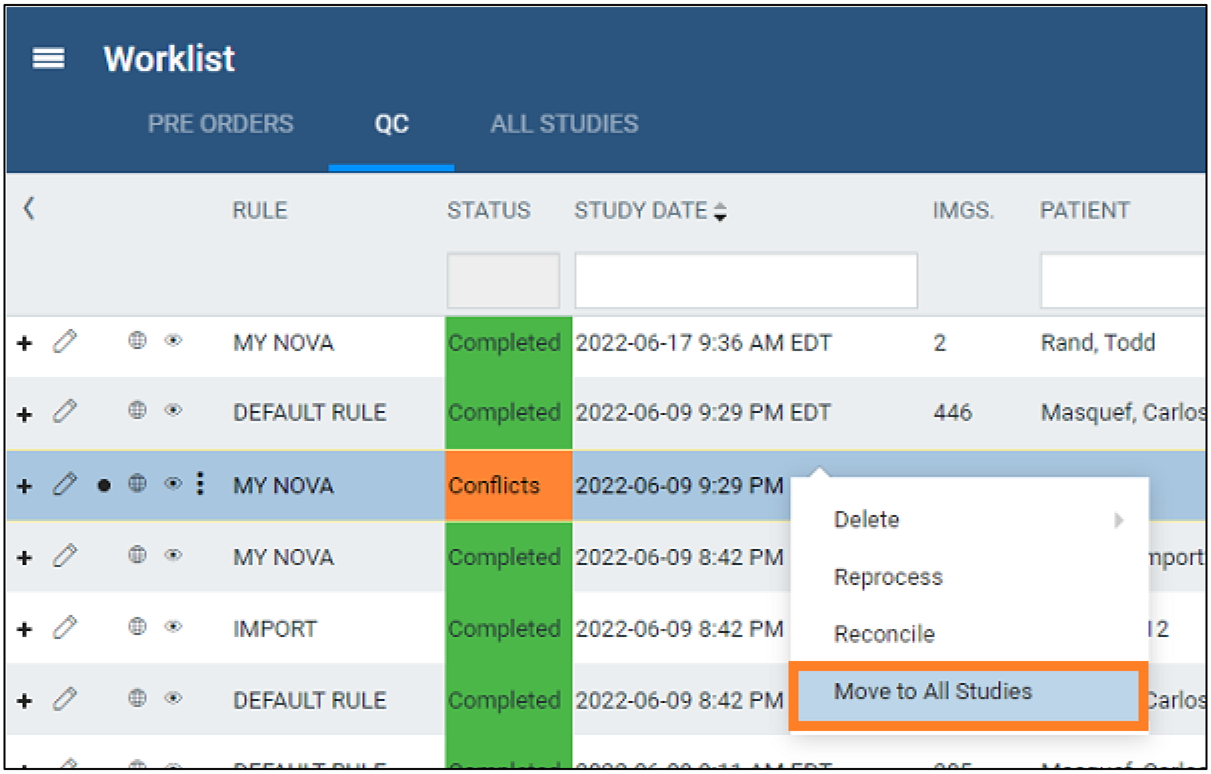
If you want to use a study in the QC tab even though it is not reconciled, you can manually move it to the All Studies tab.

> Prerequisite: [Prepare the QC tab](#).

Procedure

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.

   > Note: If Move to All Studies does not appear in the shortcut menu, try selecting Reprocess first.



See also:

[Reconcile conflicts by matching to a RIS order](#)
[Reconcile conflicts by manually editing demographics](#)
[Reconcile conflicts by creating an order](#)

Work with dictation and transcription

Exa PACS/RIS offers three main solutions for dictation and transcription.

- Dictation and transcription with Exa Voice and Exa Trans
- Dictation and transcription with Exa Trans and Dragon
- Exa Dictation and transcription with Web Trans (comes standard)

Dictation and transcription with Exa Voice and Exa Trans

If you purchased Exa Voice with Exa Trans, you can dictate and transcribe simultaneously. Exa Voice is a "zero footprint" solution for higher performance.

If you did not purchase Exa Voice, you can use Dictation and transcription with Web Trans to dictate findings and transcribe them manually, and use the features of the multipanel for transcription related tasks.

This section contains the following topics.

Turn on Exa Voice and Exa Trans
Dictate and transcribe a study
Edit and approve transcriptions
Add a dictation or transcription addendum
Manage transcription templates
Configure substitutions
Configure vocabulary
Customize Exa Trans
Use voice commands
Change text to uppercase

See also:

Assign keyboard shortcuts for Exa Trans
Dictation and transcription with Exa Trans and Dragon

Turn on Exa Voice and Exa Trans

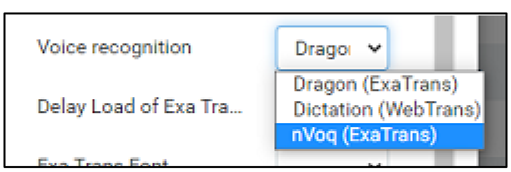
You must turn on Exa Voice and Exa Trans before using them.

Prerequisites:

- An administrator must create an Exa Voice account for each user.
- Install Exa Trans.

Procedure

1. Go to Worklist > Settings > 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.

Next: Dictate and transcribe a study
Parent: Dictation and transcription with Exa Voice and Exa Trans

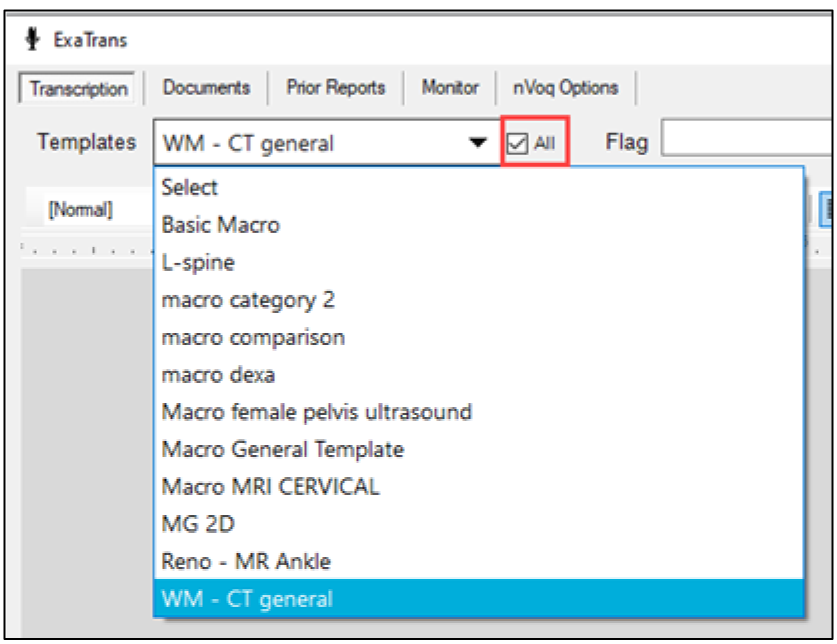
Dictate and transcribe a study

With Exa Voice and Exa Trans you can 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 Exa Voice. After the 30 seconds, dictation "stops," and the connection closes. To dictate multiple studies at once, see About Linked Reporting.

Prerequisite: Add a transcription template.

Procedure

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.
   - You can "call in" (open) a template by speaking a macro keyword if it appears in the template list.
   - Select All to show all templates, or clear to show only templates applicable to the current study.



3. Press the button on the microphone, and then begin dictating. Press the button again to pause/stop.

Notes:

- Depending on configuration, you may need to hold the microphone button down continuously to record.

- You can also select the dictation button in the bottom-right corner of the screen to start recording, and to pause.
- You can use voice commands and buttons to move between fields (until approval).

4. Optional. To view the hypothesis text during dictation, select the Show Hypothesis link.
5. Select Save.

Next: Edit and approve transcriptions
Previous: Turn on Exa Voice and Exa Trans
Parent: Dictation and transcription with Exa Voice and Exa Trans

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).

Procedure

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.

Next: Add a dictation or transcription addendum
Previous: Dictate and transcribe a study
Parent: Dictation and transcription with Exa Voice and Exa Trans

Add a dictation or transcription addendum

You cannot edit transcriptions after approval, but physicians and transcriptionists can add addendums in order to correct mistakes or insert new information.

Procedure

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.

   The status of the dictation reverts 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.

The status of the dictation reverts from Approved to Transcribed.

Previous: Edit and approve transcriptions
Parent: Dictation and transcription with Exa Voice and Exa Trans

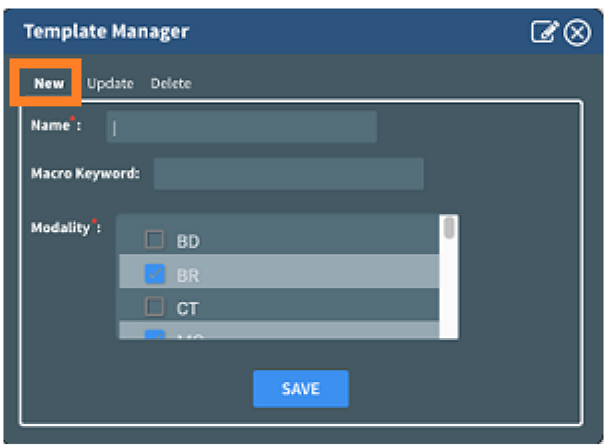
Manage transcription templates

In Exa Trans, you start dictation by selecting a transcription template that you prepare in advance as described in Add a transcription template. This topic introduces the Template Manager, which you can use to manage your transcription templates.

Prerequisites: Obtain the Transcription Template user right.

Procedure

1. In the worklist, find an unread study and select its transcription button.
2. In Exa Trans, in the upper-right corner, select the transcription template manager button.
3. In the Template Manager dialog, on the New tab, you can create a new private template based on the current template.



Setting	Description
[pencil button]	Select to open the transcription template configuration screen.
Name	Type a name for the new template.
Macro Keyword	Type a macro keyword that can be voice-recognized to call in (open) the template.
Modality	Select modalities to which to apply the template.

4. Select SAVE.
5. Optional: On the Update and Delete tabs, select active non-global templates and then edit or delete them.

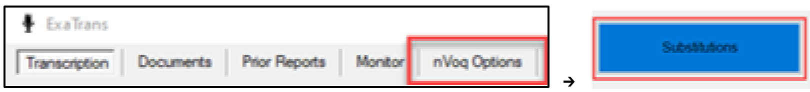
See also:
Dictation and transcription with Exa Voice and Exa Trans

Configure substitutions

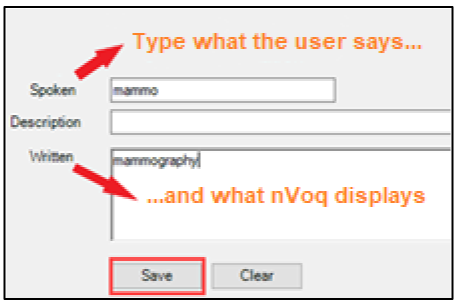
You can add substitutions (voice macros) to Exa Voice so that you can speak something short to type something long. With the example substitution below, when you say "mammo" Exa Voice types "mammography."

Procedure

1. In the worklist, find an unread study and select its transcription button.
2. In Exa Trans, on the nVoq Options tab, select Substitutions.



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.

See also:

[Dictation and transcription with Exa Voice and Exa Trans]

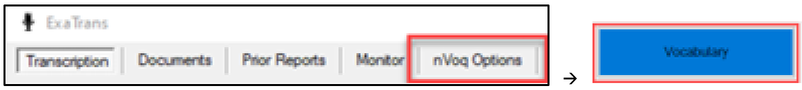
Configure vocabulary

You can add words and phrases to nVoq's vocabulary so that it can recognize proper names of people, places, product names, and uncommon words.

Prerequisite: Turn on Exa Trans and nVoq.

Procedure

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. Optional: In the Sounds Like box, type pronunciation.

   Note: Usually leave this blank. Try adding pronunciation if Exa Voice frequently fails to recognize the word or phrase.

6. Select Save.

See also:

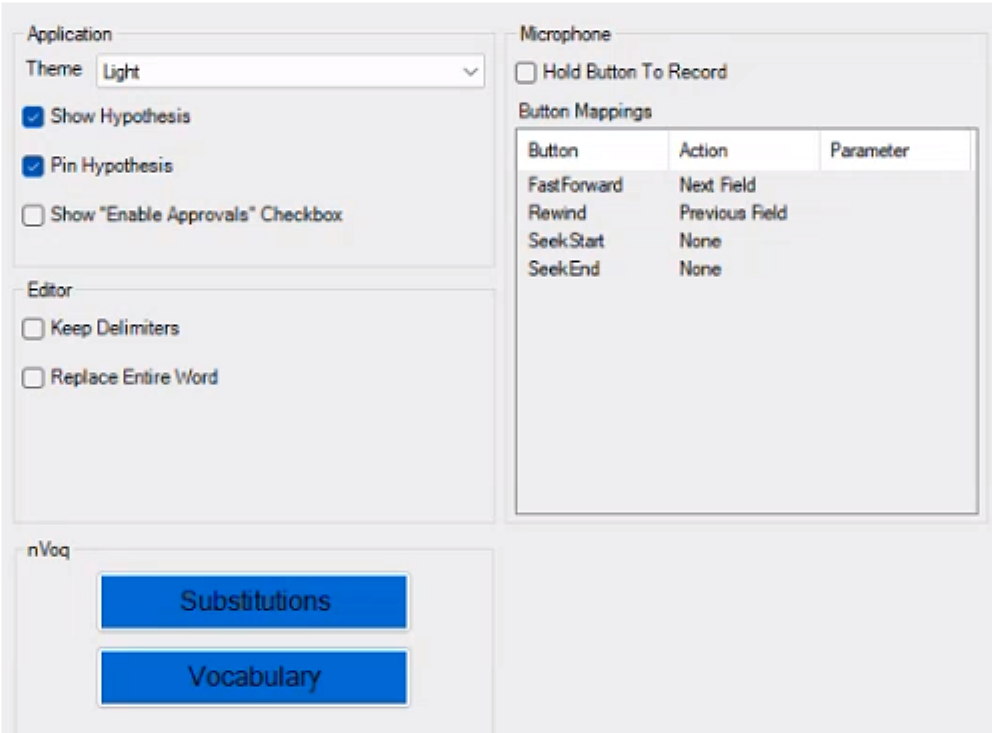
Dictation and transcription with Exa Voice and Exa Trans

Customize Exa Trans

If supported by your version you can modify Exa Trans settings in the Options tab, or by editing the configuration file.

Edit settings in the Options tab

In Exa Trans, select the Options tab, and then modify the following settings.



Command	Description
Theme	Select Light or Dark.
Show Hypothesis	Show hypothesis text as you dictate.
Pin Hypothesis	Pin the hypothesis text to the left.
Show "Enable Approvals" Checkbox	Show the checkbox.
Keep Delimiters	When replacing variables with text, leaves the brackets (or other delimiting characters).
Replace Entire Word	Even if only a part of a word is selected, dictated text overwrites the entire word.
Hold Button to Record	Select: Hold down the button during recording. Clear: Press the button once to record, again to stop.
Button Mappings	Configure buttons for SpeechMikes and PowerMics.
nVoq	Available if using nVoq. See Configure substitutions and Configure vocabulary.

Edit the configuration file

If supported in your version, you can directly open and edit Exa Trans settings for nVoq.

1. In a text editor, open [drive]:/Viztek/Exa/trans/bin/KMHA.exaTrans.WinApp.exe.Config.
2. Edit the following lines as needed.

Setting	Line	Value
Show/hide hypothesis text	<add key="ViewHypothesisText" value="1" />	0 = Hide 1 = Show

Setting	Line	Value
Pin hypothesis text	<add key="PinHypothesisText" value="1" />	0 = Unpin (text moves with the cursor) 1 = Pin (pins text to the left side of the Exa Trans window)
Mic button triggers Approve	<add key="ApproveOnMic" value="Off" />	Off = Mic buttons do not trigger Approve and Approve & Next On = Mic buttons trigger Approve and Approve & Next
Light or dark theme	<add key="Theme" value="Dark" />	Dark = Darker user interface Light = Lighter user interface
Recording timeout	<add key="PauseRecordingTimeout" value="30" />	Setting range: 0-30 0 = Recording stops immediately without entering Paused state 30 = Recording stops 30 seconds after entering the Paused state

See also:

Dictation and transcription with Exa Voice and Exa Trans

Use voice commands

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

Command	Description
[voice macro keyword]	Runs the preconfigured 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."
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.
Next line New line	Adds a line after the current line
Letter Capital	Capitalizes the current letter
Caps	Capitalizes the first letter of the current word
Caps on Caps off	Turns capitalization off the first letter of all words ON and OFF
All caps	Capitalizes all letters in the current word
All caps on All caps off	Turns capitalization of all letters of all words ON and OFF

Command	Description
Lowercase Overwrite	Sets the first dictated word in lowercase
Numeral one period One period	Creates a numbered list and capitalizes the first letter of each list item
Number next Next number	Creates a numbered list, capitalizes the first letter of each list item, and adds a new line before each item
Letter next Next letter	Creates a lettered list, capitalizes the first letter of each list item, and adds a new line before each list item.
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).
Punctuation	
Period	.
Comma	,
Colon	:
Semicolon	;
Hyphen Dash Minus sign	-
Question mark	?
Exclamation mark Exclamation point	!
Open paren Open parenthesis	(
Close paren Close parenthesis	)
Open brace Open curly brace	{
Close brace Close curly brace	}
Open bracket Open square bracket	[
Close bracket Close square bracket	]
Less than sign	<

Command	Description
Open angle bracket	
Greater than sign Close angle bracket	>
Hash sign Number sign Pound sign	#
At sign	@
Asterisk Asterisk sign	*
Ampersand And sign	&
Tilde sign	~
Forward slash Slash	/
Back slash	\
Double slash	//
Quote Open quote Open double quote Start quote	“
Unquote Close quote Close double quote End quote	”
Open single quote	‘
Close single quote	’
Apostrophe	'
Apostrophe S	's
Percent sign	%
Ellipsis	…
Dollar sign	$
Equal sign	=
Plus sign	+
Multiplication sign	*

Command	Description
Division sign	÷
Plus or minus sign	±
Underscore sign	_
Vertical bar	|
One quarter sign	¼
One half sign	½
Three quarters sign	¾
Dates and Times	
March seventeen two thousand twenty-three March seventeen twenty twenty-three	March 17, 2023
Three seventeen twenty twenty-three Three slash seventeen slash twenty twenty-three	3/17/2023
Three dash seventeen dash twenty twenty-three	3-17-2023
Two p m	2 p.m.
Two thirty a m	2:30 a.m.
Between two p m and five p m	Between 2 p.m. and 5 p.m.
Zero eight hundred hours Oh eight hundred hours	0800 hours
Zero zero twenty two hours Zero zero two two hours	0022 hours
Numbers, dollars, and cents	
One hundred	100
one hundred twenty	120
Three hundred fifty two	352
Point five Zero point five	0.5
Seventy five dollars and fifty cents	$75.50
Roman fifteen (1-19 available only)	XV

See also:

[Dictation and transcription with Exa Voice and Exa Trans]

Change text to uppercase

In Exa Trans, you can change selected text from all lowercase, or mixed uppercase-lowercase, to all uppercase.

Procedure

1. In the Exa Trans template, select text to change.
2. In the upper-right corner of the screen, select the Case A button.

   Result: The text changes to all uppercase.

   Example: tHis IS sample TEXT → THIS IS SAMPLE TEXT

See also:

Dictation and transcription with Exa Voice and Exa Trans

Dictation and transcription with Exa Trans and Dragon

If you purchased Exa Trans with Dragon, you can dictate and transcribe simultaneously. For higher performance, consider Exa Voice (Exa Trans with nVoq). Otherwise, you can use Dictation and transcription with Web Trans to dictate findings and transcribe them manually, and use the features of the Exa Panel for transcription related tasks.

Note: Often, *Transcriptionists* use Exa Dictation with Web Trans, whereas *Radiologists* use Exa Trans with Exa Voice or Dragon.

This section contains the following topics.

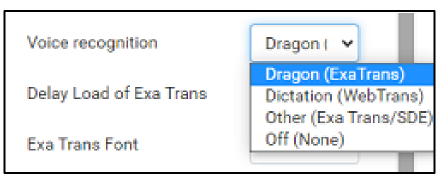
Turn on Exa Trans and Dragon

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

Prerequisite: Install Exa Trans.

Procedure

1. Go to Worklist > Settings > User Settings.
2. On the right side, under Voice recognition, select Dragon.



3. Select SAVE.

Next: Dictate and transcribe a study
Parent: Dictation and transcription with Exa Trans and Dragon

Dictate and transcribe a study

With the integrated Dragon speech-to-text application, you can use Exa Trans to dictate and transcribe findings simultaneously.

Procedure

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.

Next: Edit and approve transcriptions
Previous: Turn on Exa Trans and Dragon
Parent: Dictation and transcription with Exa Trans and Dragon

Edit and approve transcriptions

In Exa Trans with Dragon, 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.

Procedure

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.

Next: Add a dictation or transcription addendum
Previous: Dictate and transcribe a study
Parent: Dictation and transcription with Exa Trans and Dragon

Add a dictation or transcription addendum

In Exa Trans with Dragon, approved 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.

Procedure

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. If not using Dragon, select Addendum Submit for Review.

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

Previous: Edit and approve transcriptions
Parent: Dictation and transcription with Exa Trans and Dragon

About using Exa Trans and Web Trans

Exa Trans and Web Trans (with the multipanel) are designed to work in sync. Exact behavior depends on various rights, actions, and settings, as in the following examples.

Action/Condition	Effect
Close Exa Trans	Also closes Web Trans
Web Trans rights assigned	Web Trans 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 Web Trans enabled within Auto Open Orders	Exa Trans and Web Trans 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 Web Trans not enabled in Auto Open Orders	Only Exa Trans opens when a study opens (but you can still manually open Web Trans).
Set Exa Trans or Web Trans to open on a specified monitor	Manually opening Exa Trans or Web Trans opens it in the specified monitor.
Web Trans set to auto open in Auto Open Orders, but not Exa Trans	Web Trans auto opens when the viewer is opened, in the specified monitor, if so configured.
User selects the Exa Trans or Web Trans button on the worklist	Exa Trans or Web Trans 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.

Action/Condition	Effect
Exa Trans Skip	Study stays in Unread status, viewer and Exa Trans open with the next available study
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 Web Trans Esign & Approve	Exa Trans closes, Web Trans minimizes or closes
Exa Trans and Web Trans Approve & Next	Study status changes to Approve, viewer, Exa Trans, and Web Trans open with the next available study
Exa Trans and Web Trans Not Approve	Study status changes to Not Approved, viewer, Exa Trans, and Web Trans minimize or close.
Exa Trans and Web Trans Skip	Study status remains Unread, the viewer, Exa Trans, and Web Trans open the next available patient or study.
Exa Trans and Web Trans Save	Viewer, Exa Trans, and Web Trans remain open. If the user closes the viewer, Exa Trans and Web Trans also close.
Exa Trans and Web Trans Pre Approve	Study status changes to Pre-Approved, viewer and Web Trans close.

Next: Edit and approve transcriptions
Previous: Turn on Exa Trans and Dragon
Parent: Dictation and transcription with Exa Trans and Dragon

Exa Dictation and transcription with Web Trans

As the entry-level dictation and transcription solution in Exa PACS/RIS, radiologists can dictate findings in Exa Dictation, and the transcriptionist can transcribe them in Web Trans. Web Trans features "the multipanel," a centralized screen for managing transcriptions and other assets. For more advanced solutions, see Dictation and transcription with Exa Trans and Dragon and Dictation and transcription with Exa Voice and Exa Trans.

This section contains the following topics.

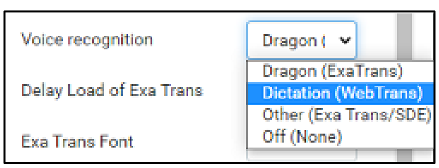
Turn on Exa Dictation and Web Trans

To get started, configure Voice Recognition as follows.

Prerequisite: The dictating radiologist and transcriptionist must both Install Exa Dictation on their workstations.

Procedure

1. Go to Worklist > Settings > User Settings.
2. On the right side of the screen, under Voice recognition, select the following:



- Transcriptionist: Dictation (WebTrans)
- Radiologist: If you will be signing off on reports, select Dictation (WebTrans). Otherwise, select Off (None).

3. Select SAVE.

Next: Dictate a study
Parent: Exa Dictation and transcription with Web Trans

Dictate a study

In Exa Dictation, radiologists can record dictation without simultaneous transcription by using the dictation toolbar .

Prerequisite: Add a transcription template

Procedure

1. In the worklist, double-click an unread study to open it in the viewer.
2. When prompted, select to open Exa Dictation or Web Trans.
3. Select a template from the dropdown list, or use a voice macro to open it.
4. On the dictation toolbar, select the record button, and then dictate your findings.
5. Use Pause during dictation if needed, and when finished, select the Stop button.
6. 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.

7. 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 Configure autosave options).

Next: Edit and approve transcriptions in Web Trans
Previous: Turn on Exa Dictation and Web Trans
Parent: Exa Dictation and transcription with Web Trans

Edit and approve transcriptions in Web Trans

The Web Trans 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).

Procedure

1. On the worklist, in the relevant study row, select the multipanel button.
2. In the Web Trans multipanel, on the toolbar, select one or more of the following buttons:

1	Open or close all panels
2	Open or close the Transcription panel.
3	Open or close the Notes panel
4	Open or close the Documents panel
5	Open or close the Prior Reports panel

Note: You can drag panels within the Web Trans screen to reposition them.

3. In the Transcription panel, review the transcription, make any needed changes, and then select Save.
4. Select Approve or Approve & Next.
5. In the Providers dialog, select the approving provider and select Approve.

Next: Enter notes in Web Trans
Previous: Dictate a study
Parent: Exa Dictation and transcription with Web Trans

Enter notes in Web Trans

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

Procedure

1. In the multipanel, open the Notes panel, and select the STUDY NOTES or REASON FOR STUDY tab.
2. If entering a study note, select a study date.
3. Type notes in the space provided, and then select SAVE.

Next: Manage documents in Web Trans
Previous: Edit and approve transcriptions in Web Trans
Parent: Exa Dictation and transcription with Web Trans

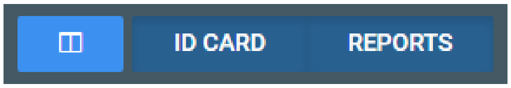
Manage documents in Web Trans

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

Procedure

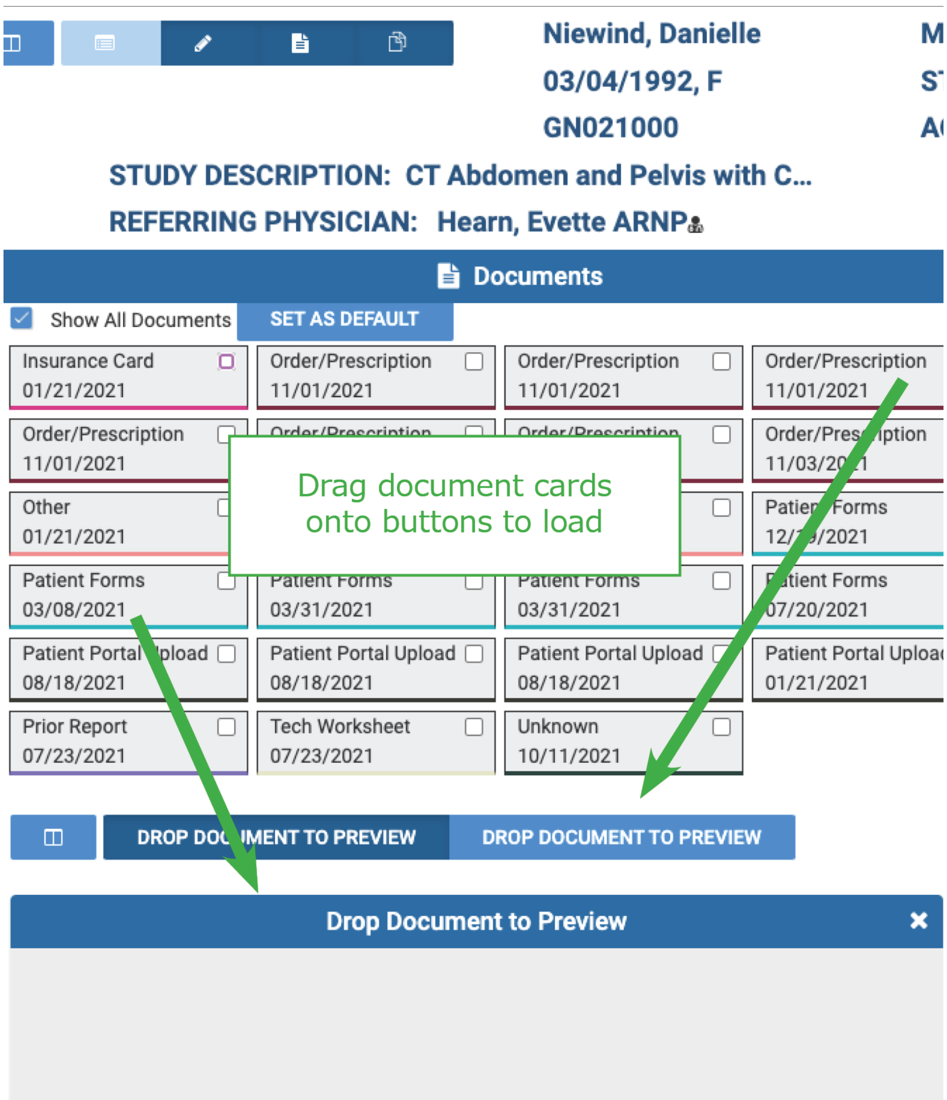
1. On the worklist, in the relevant study row, select the multipanel button.

2. In the Documents panel, select the document buttons to show or hide currently open documents in viewing frames.



> Note: 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.



Next: Manage prior reports in Web Trans

Previous: Enter notes in Web Trans

Parent: Exa Dictation and transcription with Web Trans

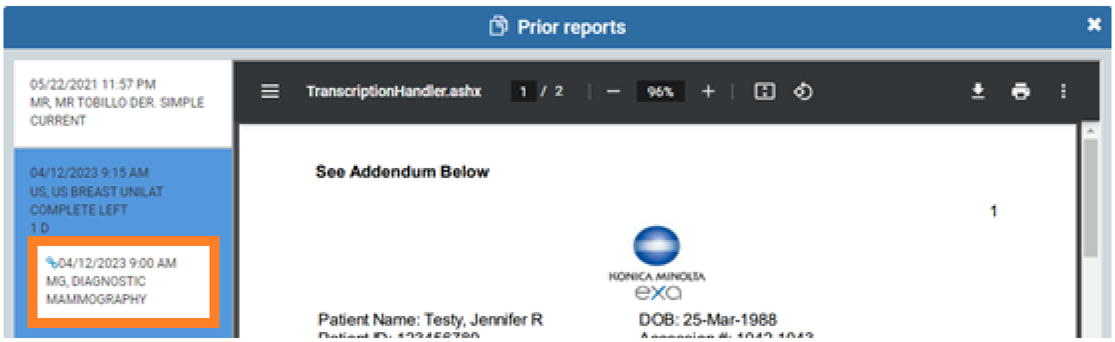
Manage prior reports in Web Trans

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

Procedure

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.

   If the report is linked, the link symbol appears in the block.



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.

Previous: Manage documents in Web Trans
Parent: Exa Dictation and transcription with Web Trans

Work with the Symmetry PACS viewer

This chapter contains the following sections (not all sections may be available depending on version and region).

Standard viewing tasks
Configure integration with third-party apps
Lines, curves, shapes, and text
Markers
Measurements
Spine labels
3D
Shutters
Other annotation tasks
Change elements in the viewer
Scaling images
Linking images
Moving and jumping to images
Use MPR tools
Work with PET fusion studies
Gather information from images

See also:

Work with Display Management

Standard viewing tasks

This section contains the following topics (not all topics may be available depending on version and region).

Open a study in a viewer
View priors and prior reports
About viewing CAD findings
View studies with CAD findings
Send an image from the viewer
DICOM-print a study
Delete images and series

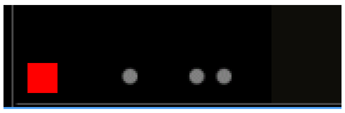
Open a study in a viewer

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

- Select the  button to open the Symmetry PACS viewer.

- Select the button to open the Exa Client viewer.
- 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 Symmetry PACS viewer, you can open priors from a list or 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:

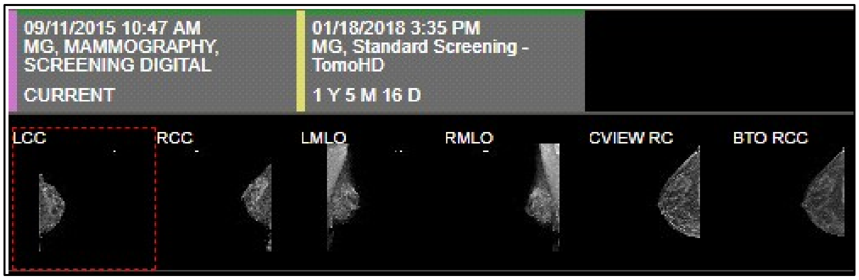
R’ The report is the main report.

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.

Open 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:

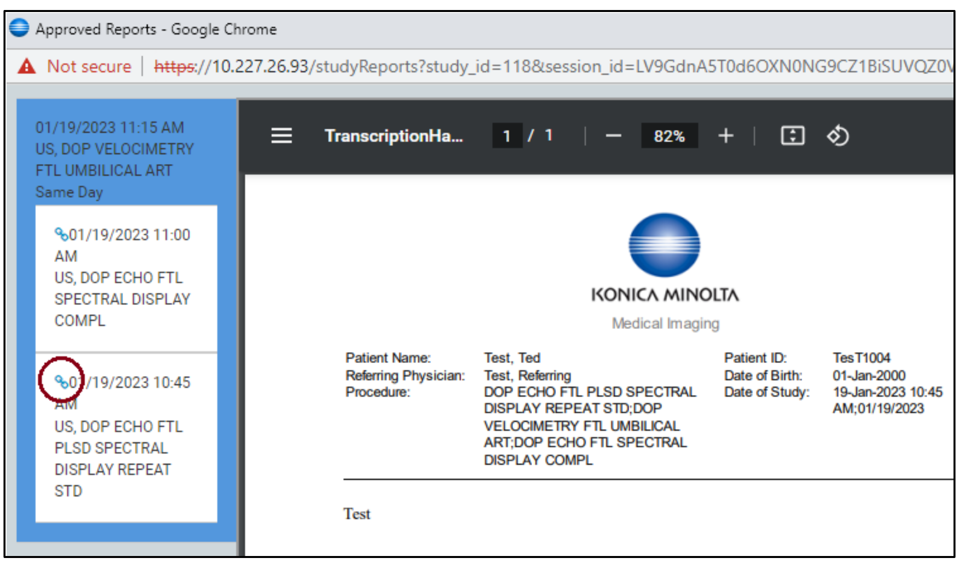
- Hover over a study to display its details.
- Select a study to open the thumbnail bar.
- Double-click a thumbnail to open its image or series.
- If a report is included, select its symbol to view.

Open a prior report

1. On the viewer toolbar, select the Prior Reports 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

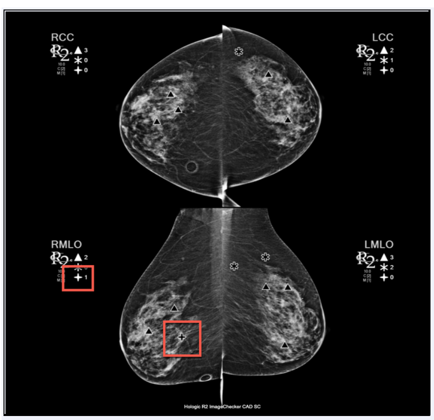
The Symmetry PACS viewer automatically displays image markers contained in SR data from supported manufacturers such as iCAD, DiA, Hologic (Malc findings, see below), and CureMetrix (such as the CureMetrix mammography calcification and density markings). To control which markings to display, select options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

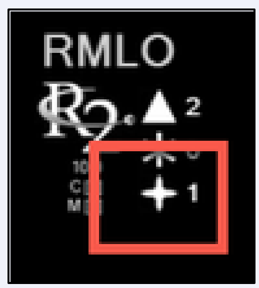
Symmetry PACS uses tracking IDs in the SR data to ensure that when you click a 2D/synthesized image annotation it jumps correctly to the corresponding 3D/BTO image. Additionally:

- 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.

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 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.

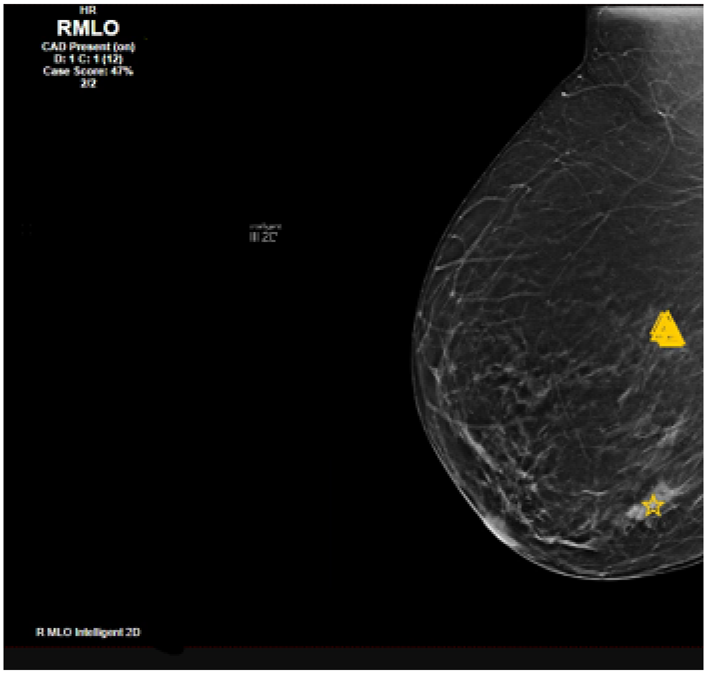




The M**alc “compass” marking and count**

Hologic Intelligent View

Hologic 3D CAD mammography software features a synthesized "Intelligent View," which is acquired at a higher resolution than their C-View. To identify Hologic Intelligent View images, "i2D" is added to the image header, such as i2D LXCC. For example, the header of the image below in Symmetry PACS would appear as i2D RMLO.



See also:

[Configure annotation colors](#)
[View studies with CAD findings](#)

View studies with CAD findings

The Symmetry PACS viewer supports 2D CAD findings for mammography and 3D tomographic series. Findings are displayed as overlays. To view CAD findings:

Prerequisite (Exa PACS/RIS only): Configure mammography (especially SR CAD options).

Procedure

1. [Open a study](#) containing CAD findings in the 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 moved 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

Send an image from the viewer

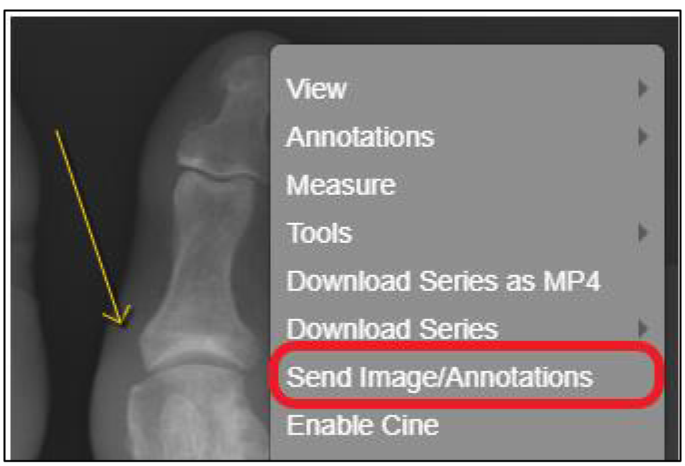
You can send the current image in the viewer to an application entity. If the image includes annotations, those annotations are included with the image according to the method you specify in the Send Annotations as setting (see Configure application entities).

Procedure

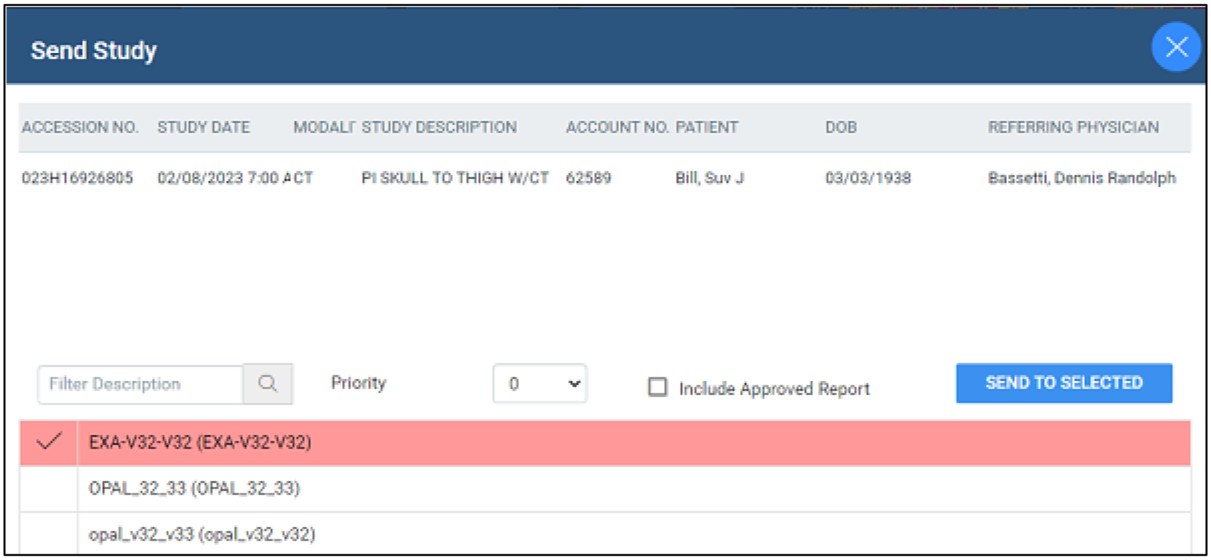
1. Optional: To send an annotated image back to its original AE, select Viewer Settings > General > Auto Send Annotated Images on Close.
2. Open a study in a viewer.
3. Optional: Add annotations.

   Note: ROI annotations are automatically sent as inclusive.

4. Right-click the image and select Send Image/Annotation.



5. In the Send Study dialog, in the bottom pane, select one or more AEs.



6. Select SEND TO SELECTED or SEND TO ALL.

See also:

[DICOM-send studies, series, or images](#)

DICOM-print a study

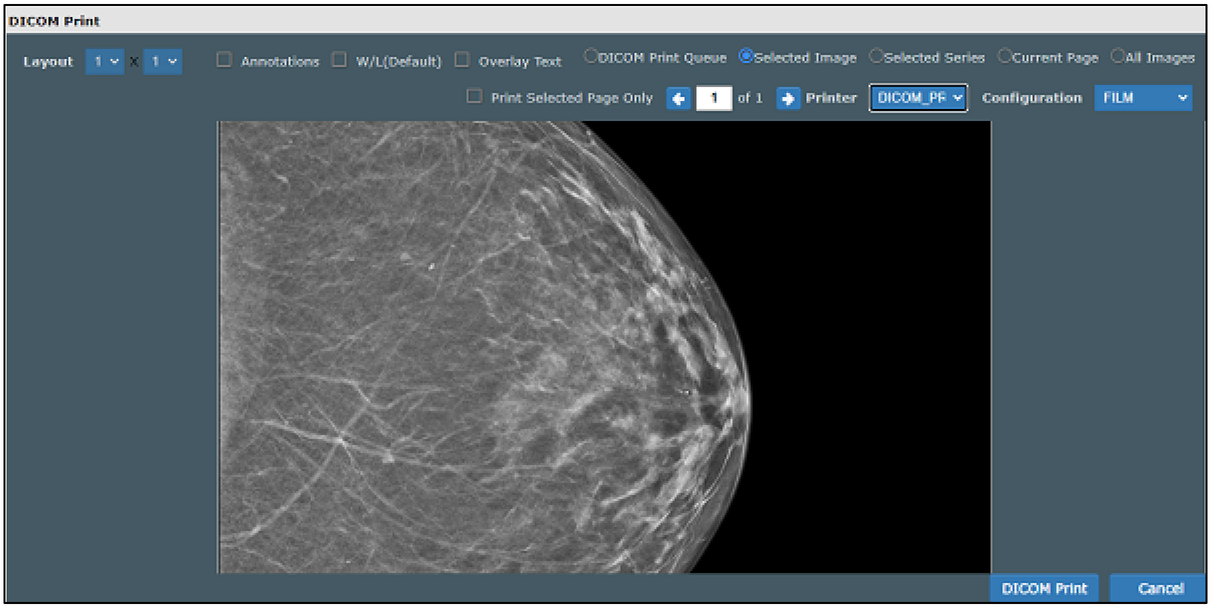
You can print the currently viewed image to a preconfigured DICOM printer. The current image prints, including any displayed annotations and overlays. See also Print images to a standard printer. You can also add selected images and series to the DICOM print queue, and print them later from the queue. This can be useful for large studies (see later in this topic).

Note: You cannot print multiframe MR/CT or MG tomography images, or US echocardio series.

Prerequisite: Add DICOM Print to the image shortcut menu.

DICOM-print the current image or series

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
DICOM Print Queue	Select to print the current contents of the DICOM print queue.
Selected Image Selected Series Current Page Key Images All Images	Select to print selected image, selected series, current page of images, key images, or all images.
Layout	Select Selected Series above, and then adjust the frame layout. The layout you select applies to the current and subsequent pages, and you can change layouts on any page.
Annotations	Select to include annotations, or clear to exclude.
W/L (Default)	Select to print the image with its original window/level settings. Clear to select the current window/level setting.
Overlay Text	Select to include the DICOM overlay (as per-image detail), or clear to exclude.
Print Selected Page Only	If viewing a series, select to print only the current page.
Prev / Next	Select to move through pages of the print preview.
Printer	Select a printer (selected earlier in this procedure).
Configuration	Select a printer configuration for the target print medium. To add or edit configurations, see Configure a DICOM printer.

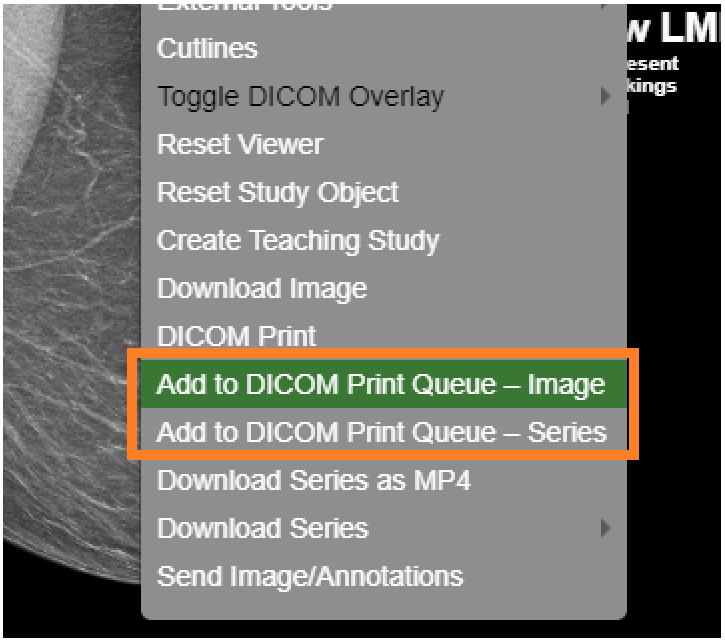
4. Select DICOM Print.

Use the DICOM print queue

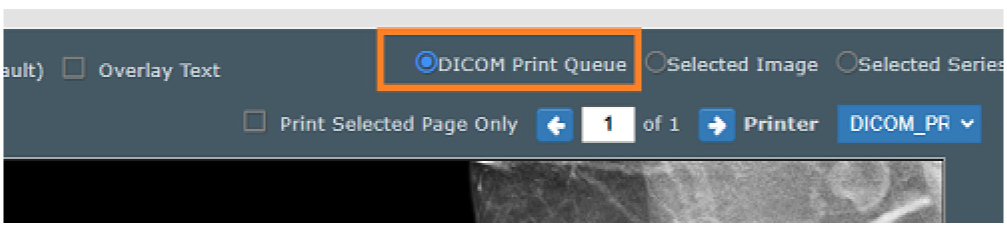
You can add images and series to the DICOM print queue, and then print everything in the queue at once.

1. On an image shortcut menu, select Add to DICOM Print Queue - Image or Add to DICOM Print Queue - Series.

   Note: You can assign toolbar keyboard shortcuts for these commands.



2. On an image shortcut menu, select DICOM Print, and then in the DICOM Print preview, select the DICOM Print Queue option.



3. Select other options as needed, and then select DICOM Print.

Delete images and series

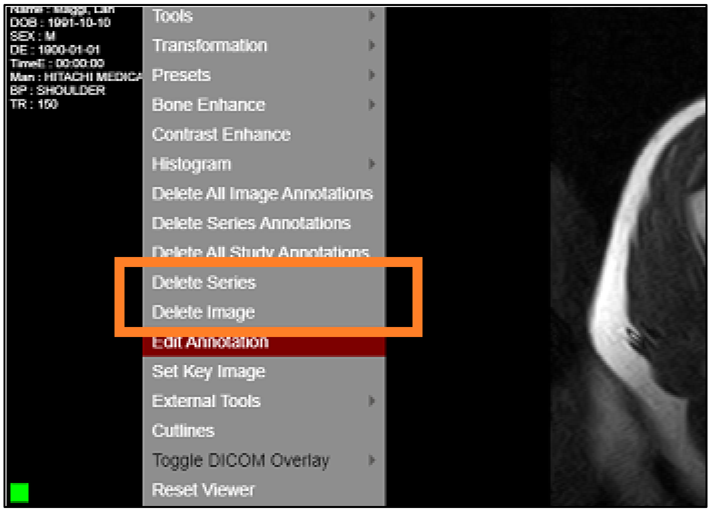
You can delete images and series from unread studies. When you delete a series, only images in the current stack and cell are deleted (even if a series is split across multiple cells). You cannot delete MPR-generated images.

Prerequisite:

- Obtain the Study Delete right from your administrator.
- Add the Delete Series and/or Delete Images commands to the shortcut menu (see Add or remove tools from the image shortcut menu).

Procedure

1. In the Symmetry PACS viewer, right-click an image or series.



2. In the shortcut menu, select Delete Image or Delete Series.

Configure integration with third-party apps

The following topics in this section describe integration with third-party apps. With the Exa platform, refer to topics in which you can integrate third-party apps such as PenRad, OrthoView, and various RIS solutions.

Configure opening of a third-party program

Configure opening of a third-party program

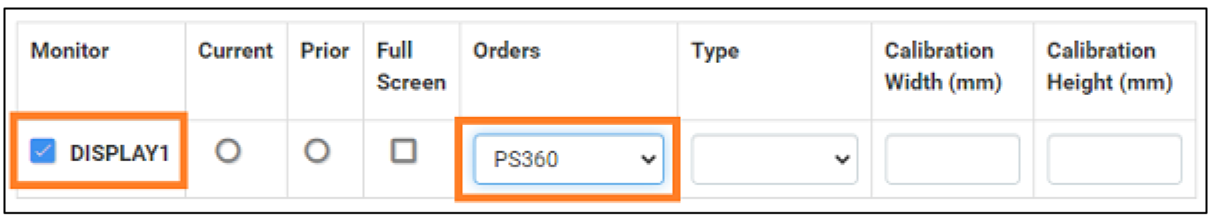
You can configure Symmetry PACS to open third-party programs such as Ikonopedia, PowerScribe 360, and MModal.

Prerequisites:

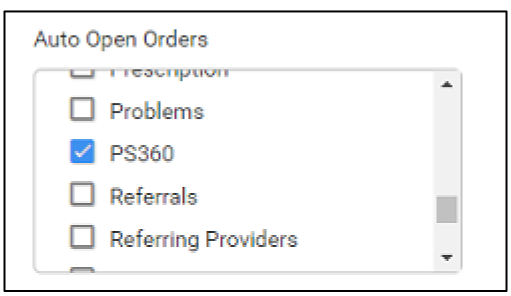
- Install Exa Launcher
- Add a trusted IP or URL

Procedure

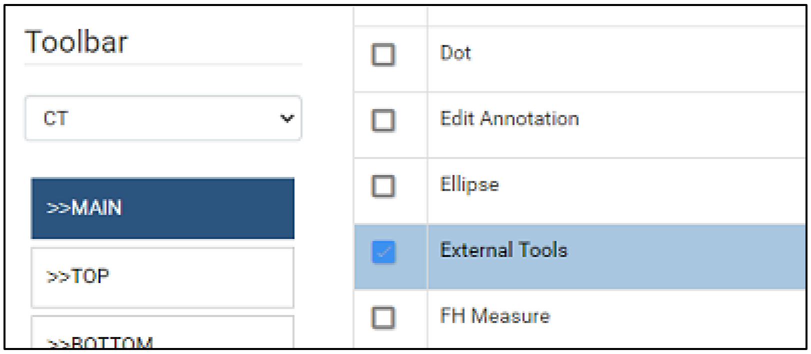
1. Go to Viewer Settings > GENERAL.
2. Under Display Settings, in the table of monitors, on the row corresponding to the monitor on which to open the third-party application, select the row's DISPLAY checkbox.



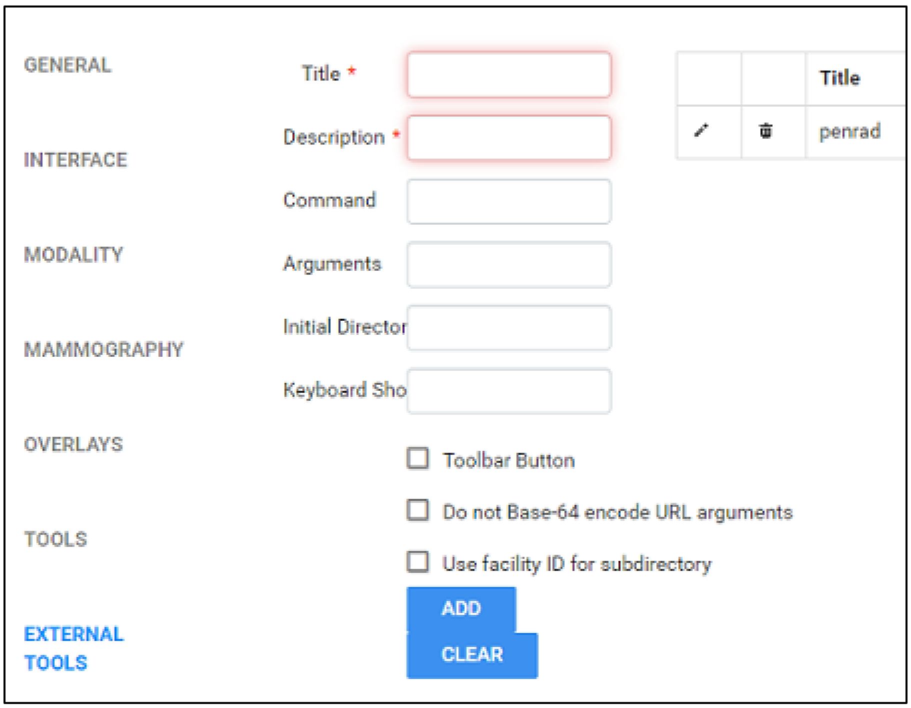
3. In the row's Orders dropdown list, select the application (such as PS360 or MModal).
4. In the left pane, select INTERFACE.
5. Under Other Toolbar, in the Auto Open Orders group, select the application (such as PS360 or MModal).



6. In the left pane, select TOOLS.
7. Under Toolbar, select MAIN, and then in the right pane, select the External Tools checkbox.



8. In the left pane, select EXTERNAL TOOLS.



9. Enter the settings in the following table, and then select ADD.

Setting	Description
Title	Type a title for the program.
Description	Type a description of the program.
Command	Type the command to run when you select the toolbar button (such as the path to the executable, or a URL).
Arguments	Type arguments to pass to the command at runtime. Symmetry PACS supports the following arguments: {{account_no}} (patient ID) {{id}} (study ID) {{accession_no}} {{facility_id}} {{username}}

Setting	Description
	{{user_id}} {{patientName}} {{patientDOB}} {{patientSex}} {{studyDescription}} {{series_uid}} {{image_uid}} To base-64 encode the URL, surround the arguments with the $$ marker. For example: exal://launch/q=$$patient_id={{account_no}}&accession_no={{accession_no}} &cmd=powerscribe&study_id={{id}}$$
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 not 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.

Prerequisite: Add the relevant toolbar tools.

Procedure

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.

Prerequisite: Add the relevant toolbar tools.

Procedure

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.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the viewer toolbar, select the curve tool.
2. Click the image at least three times 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.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the viewer toolbar, select the text T 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](#)
[Add a vertical or horizontal line](#)
[Add a left or right marker](#)

Add a dot

You can add a dot marker to an image.

Prerequisite: [Add the relevant toolbar tools](#).

Procedure

1. On the viewer toolbar, select the dot tool.
2. Click the image to place the dot.

Add a vertical or horizontal line

You can add a vertical or horizontal line to an image.

Prerequisite: [Add the relevant toolbar tools](#).

Procedure

1. On the viewer toolbar, select the vertical or horizontal line tool.
2. To add the line, click 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.

Prerequisite: [Add the relevant toolbar tools](#).

Procedure

1. On the viewer toolbar, select the left or right marker tool.

2. To add the marker, click the image.
3. Drag the marker to reposition it.

Measurements

You can take various linear and angular measurements on 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
Measure a Cobb angle
Measure an HO angle
Measure a radial angle or length
Measure an elliptical or freehand ROI
Measure a length
Measure and compare two lengths
Take a freehand measurement
Find a center point
Draw a circle and measure its radius

Measure an angle

You can measure an angle on an image.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the viewer toolbar, select the angle tool.
2. Click the image three times to place a vertex and two endpoints.
3. Move the pointer to position the angle measurement, and then click to finish.

Measure a Cobb angle

You can measure a Cobb angle on an image.

Prerequisite: Add the relevant toolbar tools.

Procedure

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 click 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.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the viewer toolbar, select the HO angle tool.
2. Click the image to place a starting point.
3. Click to place the end point.

Measure a radial angle or length

You can measure a radial angle or length on an image.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the viewer toolbar, select the radial angle or radial length tool.
2. Click 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.

Prerequisite: Add the relevant toolbar tools.

Procedure

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.

Prerequisite: Add the relevant toolbar tools.

Procedure

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.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the viewer toolbar, select the M compare tool.
2. Click the image three times 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).

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the image shortcut menu, select Annotations > Measures > FH Measure.
2. Click the image three times to place a vertex and two endpoints.
3. Move the pointer to position the circle measurements, and then click to finish.

Find a center point

You can find the center between two reference points.

Prerequisite: Add the relevant tools to the image shortcut menu.

Procedure

1. On the image shortcut menu, select Annotations > Measures > Center Point.
2. Click the image twice 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).

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the viewer toolbar, select the circle  tool.
2. Click the image twice to place two loci.
3. Move the pointer to adjust the circle, and then click 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 vertebrae in ascending or descending order.

Prerequisite: Add the relevant toolbar tools.

Procedure

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. Click the first vertebra to add the first label, and then click 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.

Prerequisite: Add the relevant toolbar tools.

Procedure

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. Click the first vertebra to add the first label, and then click on the second vertebra, and so on.

Add 3D spine labels

You can add 3D spine labels in ascending or descending order.

Prerequisite: Add the relevant toolbar tools.

Procedure

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. Click a vertebra twice 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.

Prerequisite: Add the relevant toolbar tools.

Procedure

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, click a starting vertebra.
3. Add labels.

3D labels

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.

Prerequisite: Add the relevant toolbar tools.

Procedure

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.

Prerequisite: Add the relevant tools to the image shortcut menu.

Procedure

1. On the image shortcut menu, select Annotations > 3D Point.
2. Click 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.

Prerequisite: Add the relevant tools to the image shortcut menu.

Procedure

1. On the image shortcut menu, select Annotations > 3D Ray.
2. Click 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.

Prerequisite: Add the relevant tools to the image shortcut menu.

Procedure

1. On the image shortcut menu, select Annotations > 3D ROI.
2. Click the image twice 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.

Prerequisite: Add the relevant tools to the image shortcut menu.

Procedure

1. On the image shortcut menu, select Annotations > 3D Measure.
2. Click the image twice 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.

Prerequisite: Add the relevant tools to the image shortcut menu.

Procedure

1. On the image shortcut menu, select Annotations > 3D Angle.
2. Click the image three times 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](#)

[Add a freehand shutter](#)

Add a rectangular or elliptical shutter

You can add a rectangular or elliptical shutter to “crop” unwanted areas of an image.

Prerequisite: Add the relevant tools to the image shortcut menu.

Procedure

1. On the image shortcut menu, select Annotations > Shutters > Shutter Box or Shutter Ellipse.
2. Click the image twice 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.

Prerequisite: Add the relevant tools to the image shortcut menu.

Procedure

1. On the image shortcut menu, select Annotations > Shutters > Freehand Shutter.
2. Drag on the image to draw the shutter.

Other annotation tasks

The following topics introduce additional annotation features.

Add an AR annotation

You can plot points to represent angular rotation.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the viewer toolbar, select the AR tool.
2. Click the image six times 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.

Prerequisite: Add the relevant toolbar tools.

- To save the current annotations, on the toolbar, select the save annotations button.
- To delete all annotations, on the toolbar, select the delete all annotations button.
- To delete all annotations for the current series, on the image shortcut menu, select Delete Series Anno.
- To delete all annotations for the current study, on the image shortcut menu, select Delete Study Anno.

Annotate series

You can add the same annotation in the same location to all images in a series. This feature is not available with 3D annotations. Any subsequent edits you make to annotations added in this way only apply to the image you edit, not the entire series.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. In the Exa PACS/RIS viewer, open a series.
2. On the toolbar, select the Annotate Series AS tool.
3. Select another annotation tool (for example, the Ellipse tool).
4. Add the annotation to the current image (for example, draw an ellipse).

   Result: The annotation (such as an ellipse) appears on all images in the series.

Annotate tagged images

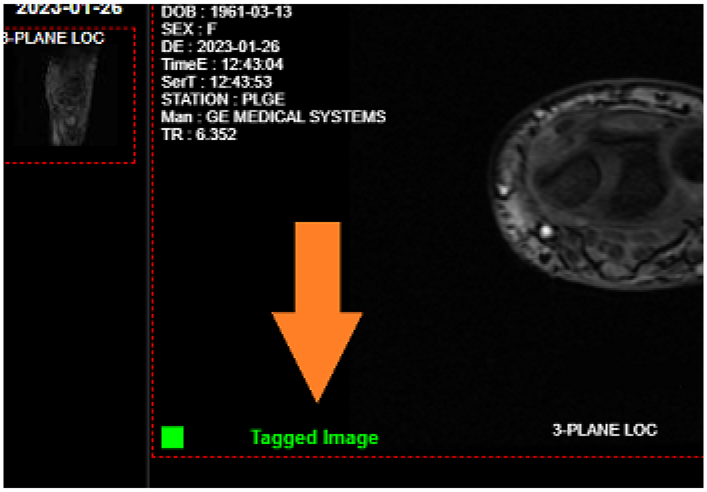
To annotate all images in a series, see Annotate series. If you want to annotate multiple—but not all—images in a series, use the procedure below to *tag* (select) them and then annotate only the tagged images. Any subsequent edits you make to annotations added in this way only apply to the image you edit, not the entire series. This feature is not available with 3D annotations.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. Open series or multiple images in the Exa PACS/RIS viewer.
2. On the viewer toolbar, select the Tag Images TI tool.
3. Click on an image to tag it.

   Result: The image is tagged for annotation.



4. Repeat for all images you want to annotate.
5. On the toolbar, select the Annotate Tagged Images ATI tool.
6. Select another annotation tool (for example, the Ellipse tool).
7. Add the annotation to one of the tagged images (for example, draw an ellipse).

   Result: The annotation (such as an ellipse) appears on all tagged images, and the images are no longer tagged.

   Note: These multi-image annotations are not "linked," so you can edit annotations in one image without modifying the corresponding annotations in other images.

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.

Prerequisite: Add the relevant toolbar tools.

- On the viewer toolbar, select the reset viewer button.

Change elements in the viewer

The following topics are contained in this section.

Show or hide overlays

You can turn overlays on or off. This includes PR (GSPS) DICOM objects from Intelerad, which are supported as overlays. Also, to avoid obscuring anatomy in MG studies, turning off overlays also hides other MG-related information such as quick history, laterality, and CAD and stack information.

Prerequisite: Add the relevant toolbar tools.

- On the viewer toolbar, select the Overlays or Toggle DICOM Overlay button to turn overlays on or off.

See also:

Configure overlays

Show or hide annotations

You can turn annotations on or off.

Prerequisite: Add the relevant toolbar tools.

Procedure

- On the viewer toolbar, select the toggle annotations button to turn annotations on or off.

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.

Prerequisite: Add the relevant toolbar tools.

- 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.

Prerequisite: Add the relevant toolbar tools.

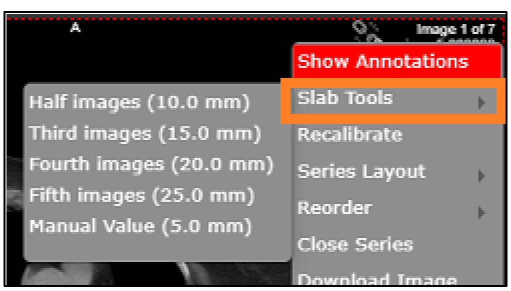
- On the viewer toolbar, select the cutlines button.

Split series by slab thickness

You can use slab tools to split series by image thickness.

Procedure

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.



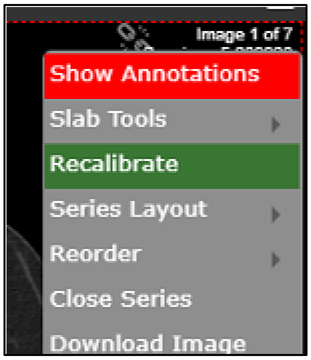
Recalibrate the scale

You can manually recalibrate the scale measurement, which is shown on the caliper of the current series.

Procedure

1. In the upper-right corner of a frame, right-click the menu icon.

2. In the shortcut menu, select Recalibrate.



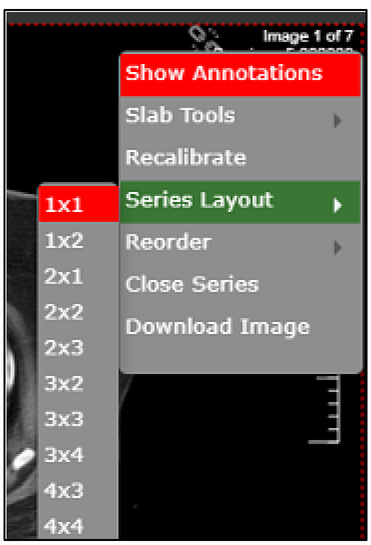
3. In the dialog, type a new value (mm) for the scale, and then select OK.

Change the series layout

You can change the number of series panels displayed in the viewer.

Procedure

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.

Procedure

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.

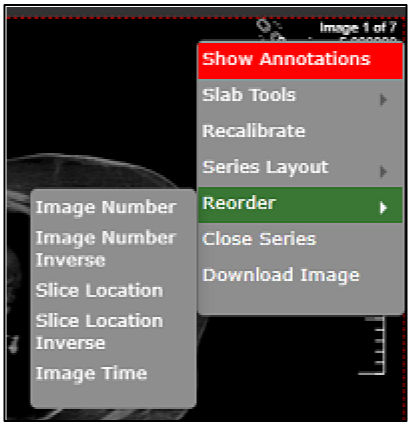


Image Number – Arranges the images by number in ascending order.

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

The following topics are contained in this section.

How the viewer chooses the initial window/level

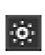
There are many sources of window/level settings. When the viewer displays an image, it chooses the window/level settings from the first available of the following sources, in order.

- 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

Adjust the window/level

You can manually adjust the window/level.

Prerequisite: Add the relevant toolbar tools.

- 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.

Prerequisite: Add the relevant tools to the image shortcut menu.

- On the image shortcut menu, select Presets, and then select a preset.

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.

Prerequisite: Add the relevant toolbar tools.

- On the viewer toolbar, select the auto window/level button.

Apply CLAHE enhancement

You can apply CLAHE to enhance local contrast.

Prerequisite: Add the relevant toolbar tools.

- 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.

Prerequisite: Add the relevant toolbar tools.

Procedure

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.

Prerequisite: [Add the relevant toolbar tools](#).

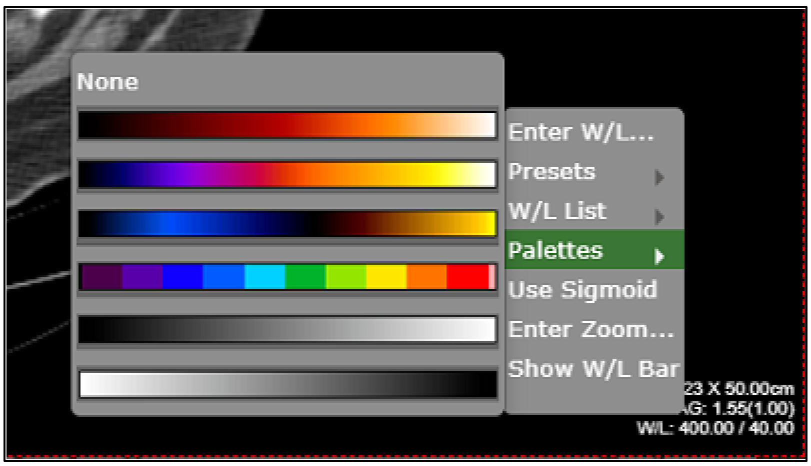
- On the viewer toolbar, select the invert colors button.

Add color to images

You can add color to images.

Procedure

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

The following topics are contained in this section.

Zoom images

You can zoom in on (enlarge) or out of (reduce) images for optimum viewing. There are several ways to zoom:

Prerequisite: Add the relevant toolbar tools.

- 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 (< >).

> Note: Available for image data only. If Skin Line is turned ON, when using quad zoom for mammography images, the zoom factor is based on the skin line to ensure that anatomy gets maximal placement within the cells.

Display one to one

If you zoomed an image you can restore it to its original DICOM size. This is essentially “life size.”

Prerequisite: Add the relevant toolbar tools.

- On the viewer toolbar, select the one to one button.

Display images in their actual size

You can display images in their original size.

Prerequisite: Add the relevant toolbar tools.

- 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.

Prerequisite: [Add the relevant toolbar tools](#).

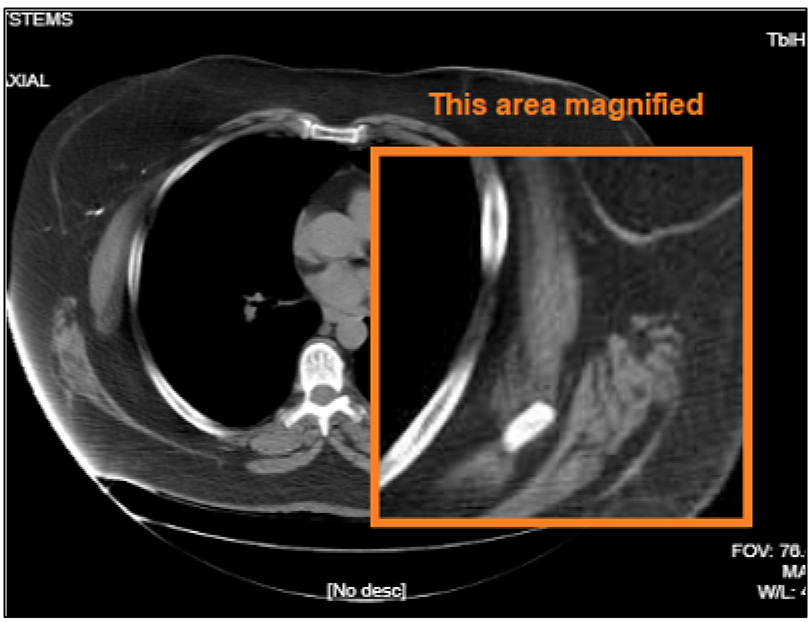
- On the viewer toolbar, select the fit to window button.

Use the magnifying glass

You can use the magnifying glass tool to zoom an area of the current image.

Prerequisite: [Add the relevant toolbar tools](#).

- 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. Refer to the following topics.

[Auto link images](#)
[Manually link images](#)
[Use the context tool](#)
[Reset linked 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.

Prerequisite: [Add the relevant toolbar tools](#).

- 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 move through a recent image and a corresponding prior, side-by-side.

Prerequisite: [Add the relevant toolbar tools](#).

- 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.

Prerequisite: [Add the relevant toolbar tools](#).

- 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

The following topics are contained in this section.

Pan images

You can pan an image to view any portions that extend beyond the visible frame.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. On the viewer toolbar, select the pan tool.
2. Drag the image in any direction.

Move or span through images

You can move or span through images in a series. *Spanning* means to move rapidly with minimal hand or wheel motion.

To adjust the span sensitivity, see Configure the toolbar.

- To move: 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.

Prerequisite: Add the relevant tools to the image shortcut menu.

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.

Prerequisite: [Add the relevant toolbar tools](#).

Procedure

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.

Note: You can also press the space bar to play and pause.

Use key images

You can specify key images in a series that you can jump to at any time. You can add key image thumbnails on reports.

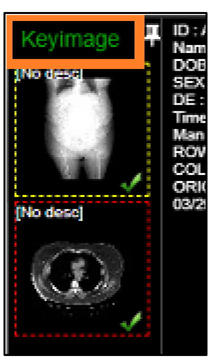
Prerequisite: [Add the relevant tools to the image shortcut menu](#).

Specify a key image

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

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 to open the key image.

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:

Procedure

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.

Prerequisite: Add the relevant toolbar tools.

Procedure

1. Open two or more series.
2. On the viewer toolbar, select the Triangulation button.
3. 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. Refer to the following topics.

Perform simple MPR
Perform standard MPR
Handle MPR images
Save an MPR series

Perform simple MPR

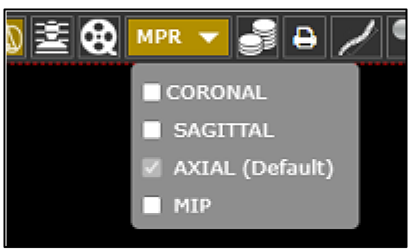
You can perform simple MPR to generate a single alternate planar view from the base view.

Prerequisites:

- If performing MPR on a fusion study, wait until both series are fully pre-fetched.
- Add the MPR tool.

Procedure

1. Open a series, and then double-click an image to view it full screen.
2. Select the arrow on the right side of the MPR  button.



3. In the button shortcut menu, select a plane.
4. The viewer performs MPR and displays the new plane.

Perform standard MPR

You can perform standard MPR to generate three additional planar views of the base image.

Prerequisites:

- If performing MPR on a fusion study, wait until both series are fully pre-fetched.
- Add the MPR tool.

- Open a series, and then select the 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.

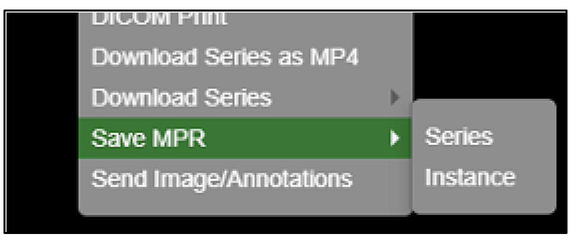
- To move through MPR images, drag the blue region bars. You can also drag the endpoints to adjust the viewing angle.
- To move both region bars at the same time, on the toolbar, select the context tool, and then drag on the base image.
- To change the slice thickness, double-click the thickness value, 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

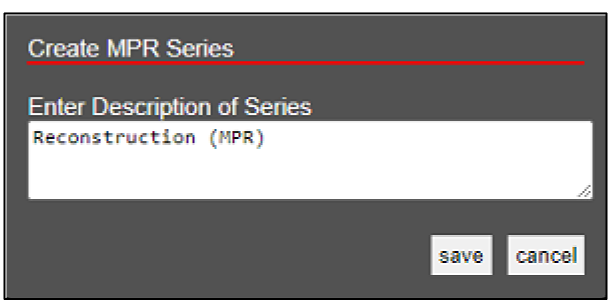
After you perform MPR, you can save the resultant images and series for later viewing.

Procedure

1. [Perform simple MPR] or [Perform standard 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.

Work with PET fusion studies

The following topics are contained in this section.

Turn PET fusion display on and off
Color and blend PET fusion source studies

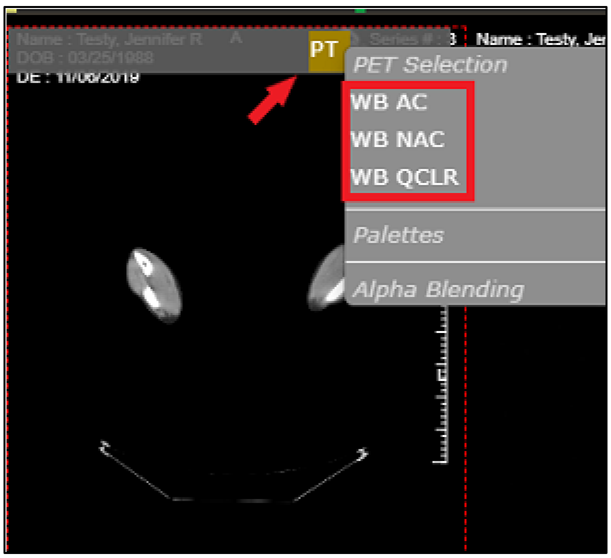
Turn PET fusion display on and off

If a PET study was fused with another study such as a CT scan, you can turn display of the fused study on or off.

Procedure

1. To turn on fusion display, hover over the top of an image to display the image's top shortcut menu, and then select PT.

2. In the PT button shortcut menu, under PET selection, select a source study.



"Fused" appears in the lower-left part of the image to indicate the display state.

3. To turn off fusion display, in the PT button shortcut menu, select Remove current PET.

See also:

Color and blend PET fusion source studies

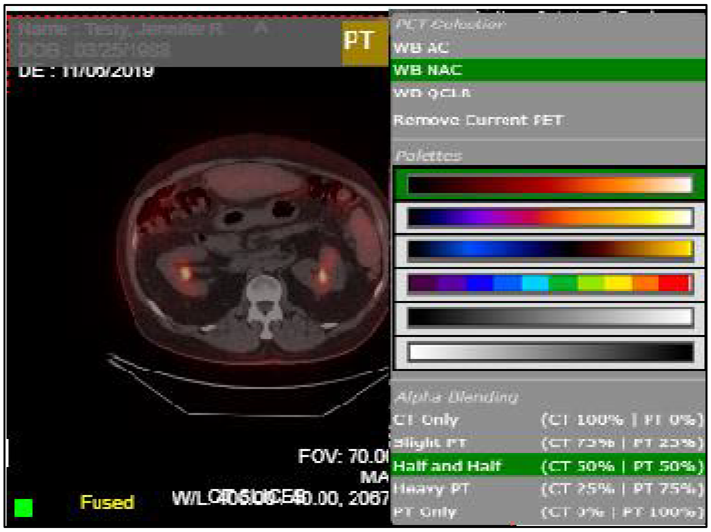
Color and blend PET fusion source studies

You can add color to source studies in a PET fusion study, and control alpha blending of the two studies. Specifying a color in one image applies the color to all images in the series.

Prerequisite: Turn PET fusion display on.

Procedure

1. In the PT button shortcut menu, under PET selection, select the source study to color.



2. In the PT button shortcut menu, under Palettes, select a color.

3. In the PT button shortcut menu, under Alpha Blending, select a blending option.

Gather information from images

The following topics are contained in this section.

View pixel values in Hounsfield units

You can view the value of a selected pixel in Hounsfield units.

Prerequisite: Add the relevant toolbar tools.

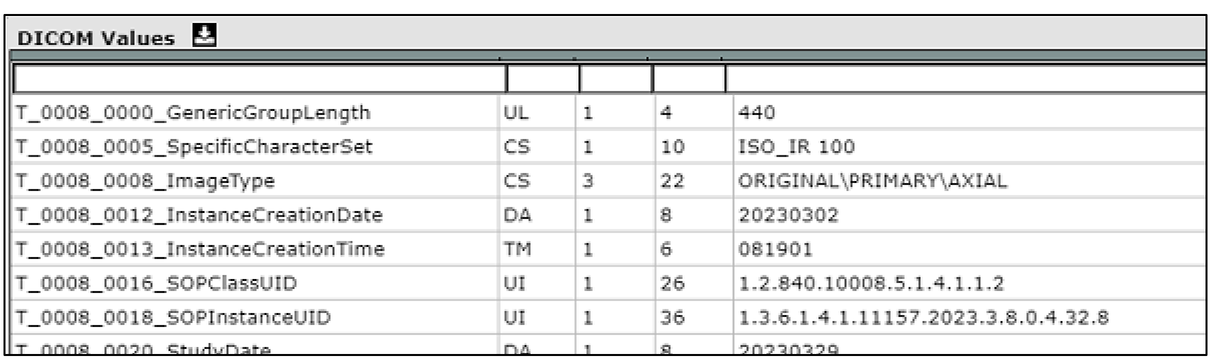
- On the viewer toolbar, select the Hounsfield units tool, and then select and hold the mouse button on the pixel of interest.

Display DICOM values

You can display the DICOM tag values associated with the current image by doing one of the following.

Prerequisite: Add the relevant toolbar tools.

- On the viewer toolbar, select the DICOM values button.
- On an image shortcut menu, select View > DICOM Values.



DICOM Values

T_0008_0000_GenericGroupLength	UL	1	4	440
T_0008_0005_SpecificCharacterSet	CS	1	10	ISO_IR 100
T_0008_0008_ImageType	CS	3	22	ORIGINAL\PRIMARY\AXIAL
T_0008_0012_InstanceCreationDate	DA	1	8	20230302
T_0008_0013_InstanceCreationTime	TM	1	6	081901
T_0008_0016_SOPClassUID	UI	1	26	1.2.840.10008.5.1.4.1.1.2
T_0008_0018_SOPInstanceUID	UI	1	36	1.3.6.1.4.1.11157.2023.3.8.0.4.32.8
T_0008_0020_StudyDate	DA	1	8	20230329

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.

Prerequisite: Add the relevant tools to the image shortcut menu.

Procedure

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.

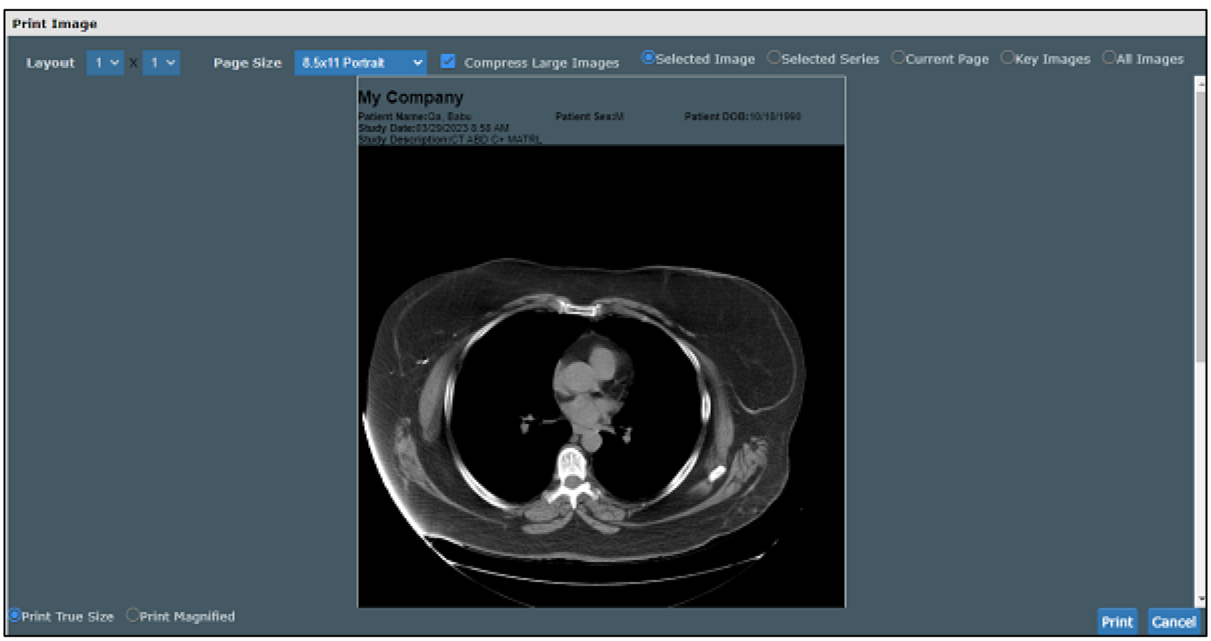
Print images to a standard printer

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. See also DICOM-print a study.

Prerequisite: Add the relevant toolbar tools.

Procedure

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.

Key Images – Select to print key images from the current series.

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.

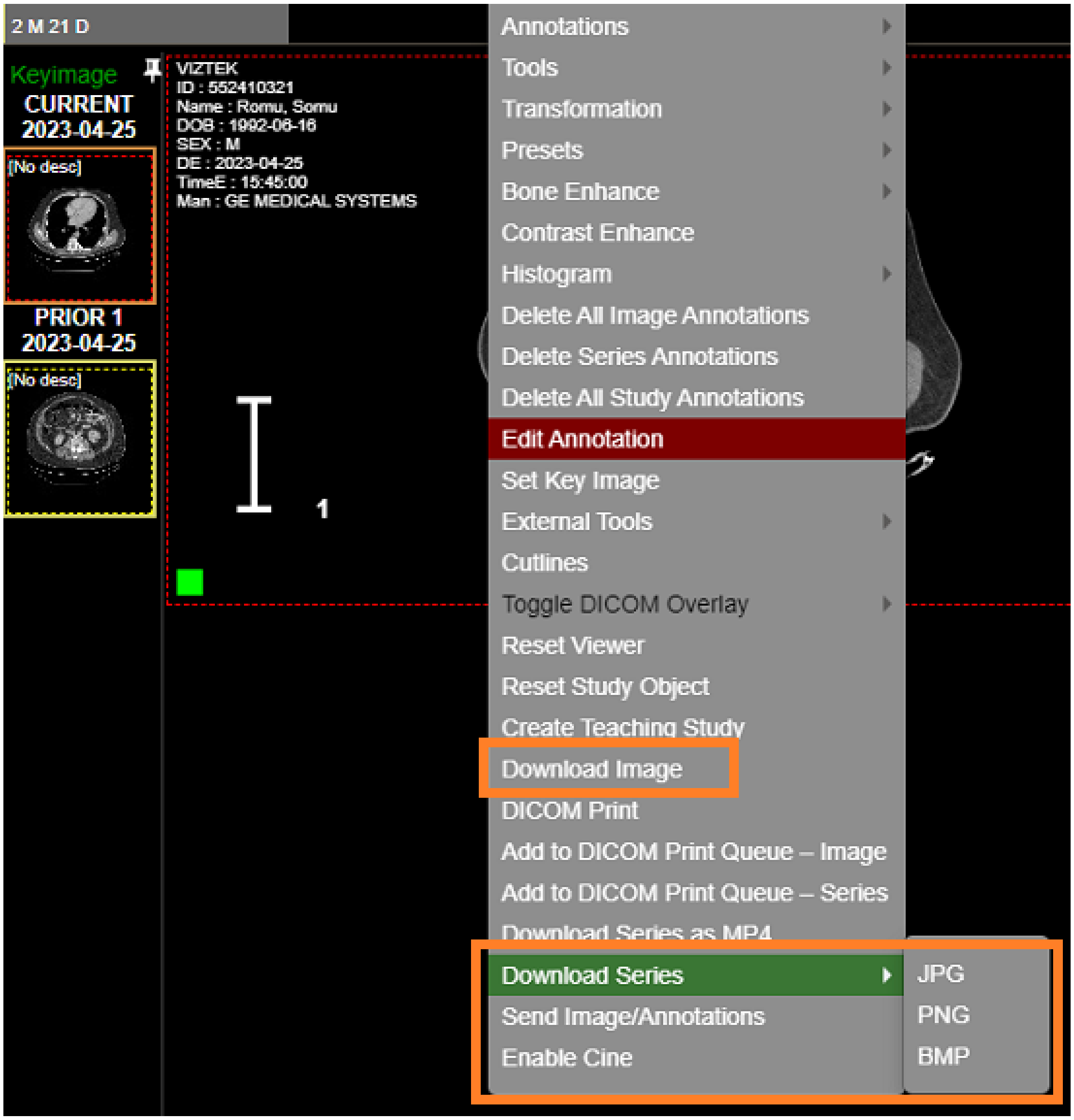
Prerequisites: Configure opening of a third-party program

- 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.

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.

This chapter contains the following sections.

Setup and basics
Create a DM
Use DM groups
More example DMs

Setup and basics

This section contains the following topics.

Configure viewer settings for DMs
Use the DM toolbar
Display images with a DM
Use DM Manager

Configure viewer settings for DMs

Before working with DMs, configure the settings described in the following sections in this manual.

Configure modality-specific viewing options
Set up connected displays

Next, configure viewer settings as follows.

Procedure

1. Go to Viewer Settings > 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.

Use the DM toolbar

The DM toolbar gives you quick access to DM related functions.

Show the DM toolbar

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.

Use the DM toolbar

In the example in the figure below, the toolbar contains tools on the left, and DMs (DM and mg_DM) on the right. "DIAGNOSTIC MAMMO" is the name of a user-created DM group. Use the toolbar as follows.

- [Top button]: If available, select a DM group to display the group's DMs on the right.
- 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 Update deletes all settings of the current DM.

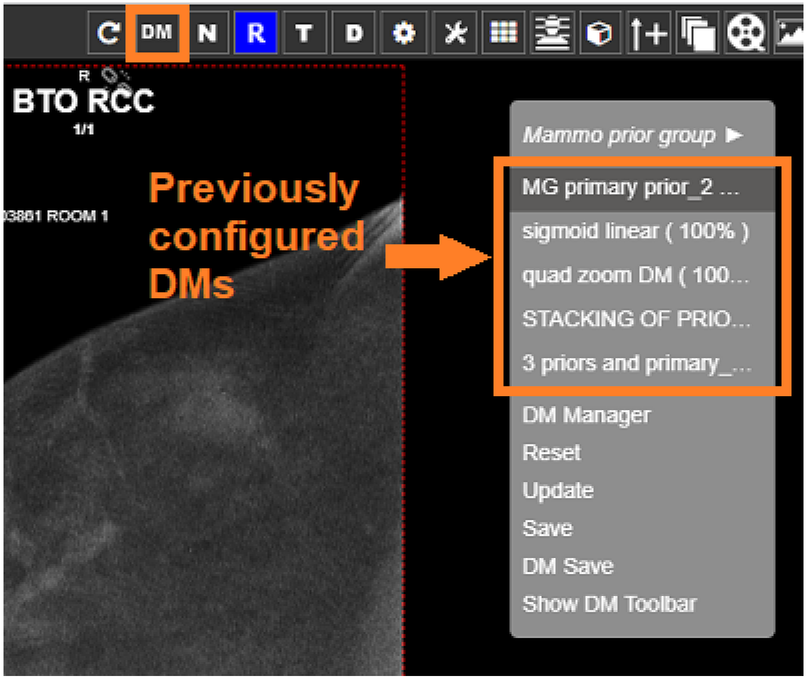
- Manage: Opens the DM manager.
- Reset: Select to apply any newly created or edited DMs.
- Refresh: You can also *refresh* DMs to update the list of applicable DMs.
- [DM]: Select any DM on the DM toolbar to apply it in the viewer.

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 (see Use the DM toolbar). Otherwise, you can use the DM button on the viewer toolbar as follows:

Procedure

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.



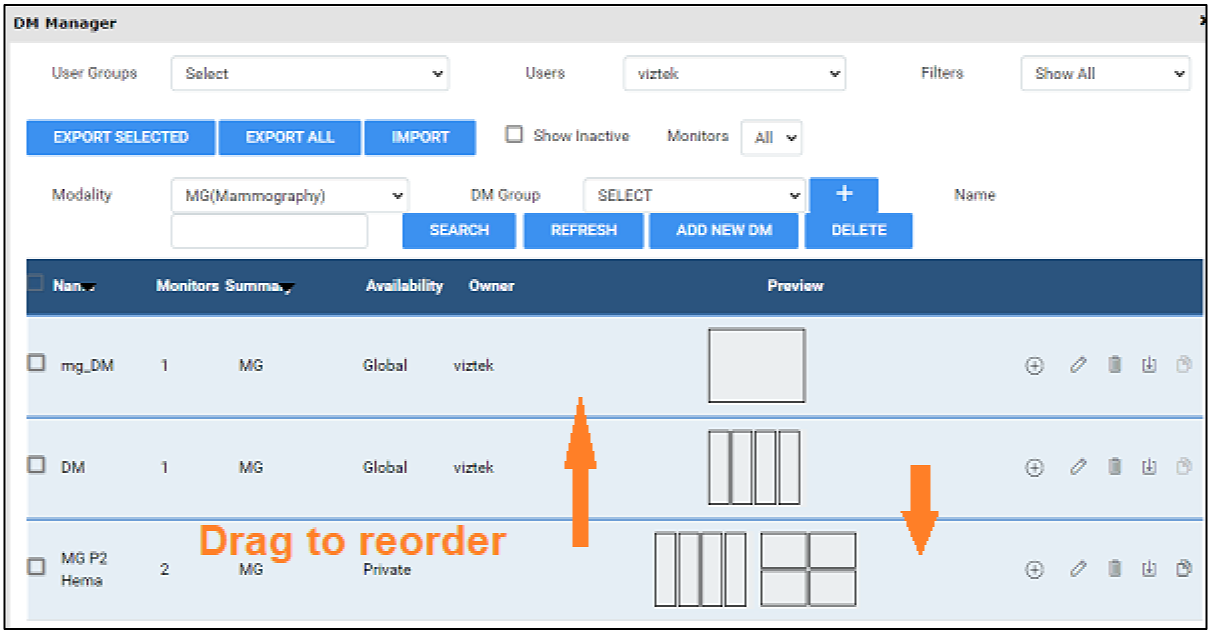
Result: Images hang according to the settings in the DM. When multiple images hang in a single cell, they appear in the same order as in the DM.

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 DM Manager

In DM Manager, you can create, edit, and manage all your DMs from a centralized screen.

1. On the viewer toolbar, select the display manager button.
2. In the button shortcut menu, select DM Manager.



Each DM appears in its own row (light blue, bottom half)

> Note: When you open a study in the viewer, it hangs in the highest DM in the list that matches the study.

3. To search for a DM, enter one or more of the following search criteria.

   You can also click column headers to sort by, for example, the DM name or its number of monitors.

Setting	Description
User Groups	Select the group to which the DM user belongs.
Users	Select users associated with the DM.
Filters	Select whether the DM is private (user-specific) or public.
Monitors	Select how many monitors are configured in the DM.
Modality	Select the modality associated with the DM.
DM Group	Select DM groups associated with the DM.
Name	Type all or part of the name of the DM.

4. Select SEARCH.

   Result: 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.

Use DM tools

Each DM has four buttons on the right side of the list:

Add – Adds the DM to a DM group that you can select.

Edit – Opens the DM for editing (for configuration, see Create a general 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.

Create a DM

DMs are very powerful tools for customizing the way studies are displayed in the Exa PACS/RIS viewer.

Prerequisite: Configure viewer settings for DMs

This section contains the following topics (not all topics may be available depending on region and version).

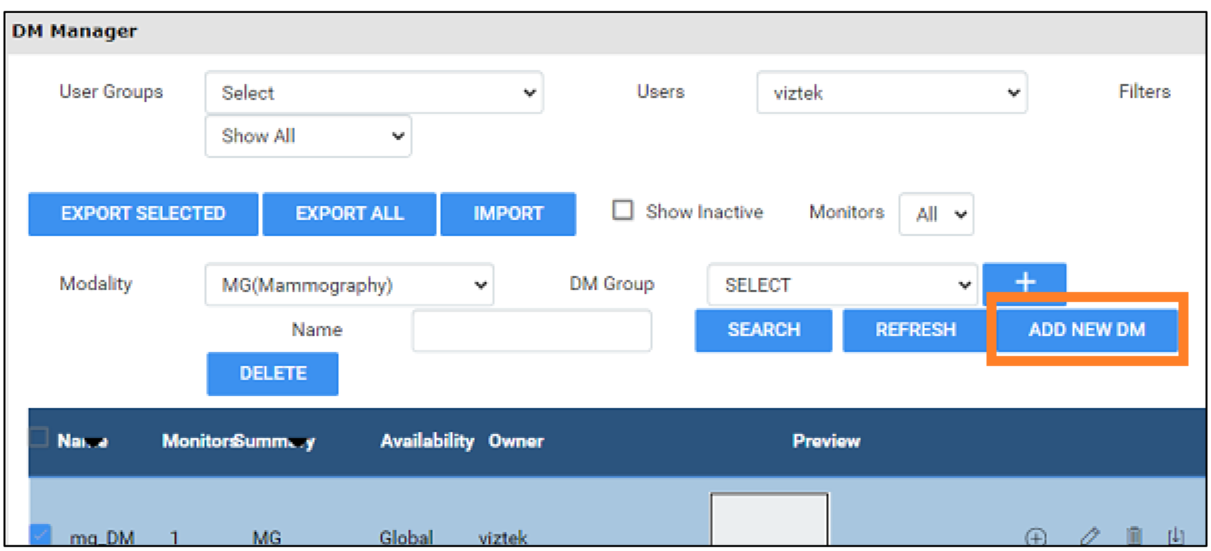
Create a general DM
Use the Display Management sub-tab

Create a general DM

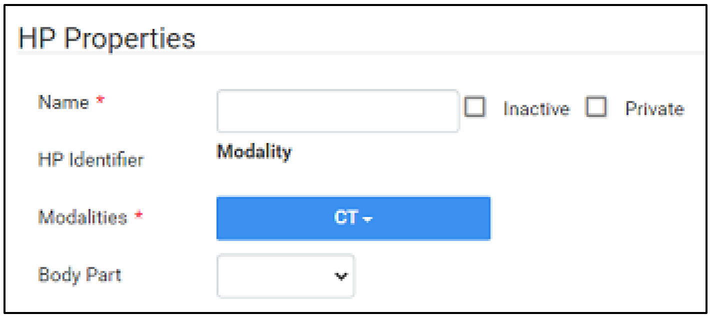
The following is an example of how to create a basic general (non-mammo) DM.

Procedure

1. Open a study in the viewer that you want to hang in the DM you are creating. Set the series layout and drag images into the cells.
2. On the viewer toolbar, select the display manager DM button, and then select DM Manager.
3. In the DM Manager dialog, select ADD NEW DM.



4. In the second DM Manager dialog, enter the following settings.



Setting	Description
Name	Type a name for the DM.
Inactive	Optional: Select to disable the DM until ready to use.
Private	Optional: Select to make the DM available only to you.
Modalities	Select all modalities that potentially could hang in the DM. Note: This must be the modality of the currently opened study, or the validation percentage may not reach 100.
Body Part	Optional: Prevents all but the selected body part to display. To display any body part, leave blank.

5. In the Preview area, under Monitors, select the number of monitors you use *for viewing images*.
6. Under Preview, in the upper-left corner of the frame, select "1*1" and then select a cell layout (for the study-level series/images within the monitor).
7. Optional. Select 1*1 in one of the cells, and select a series layout (for the series-level images within a cell).
8. Optional. To allow missing cells, in the upper-right corner of a page or cell, select the checkbox (see About missing cells).

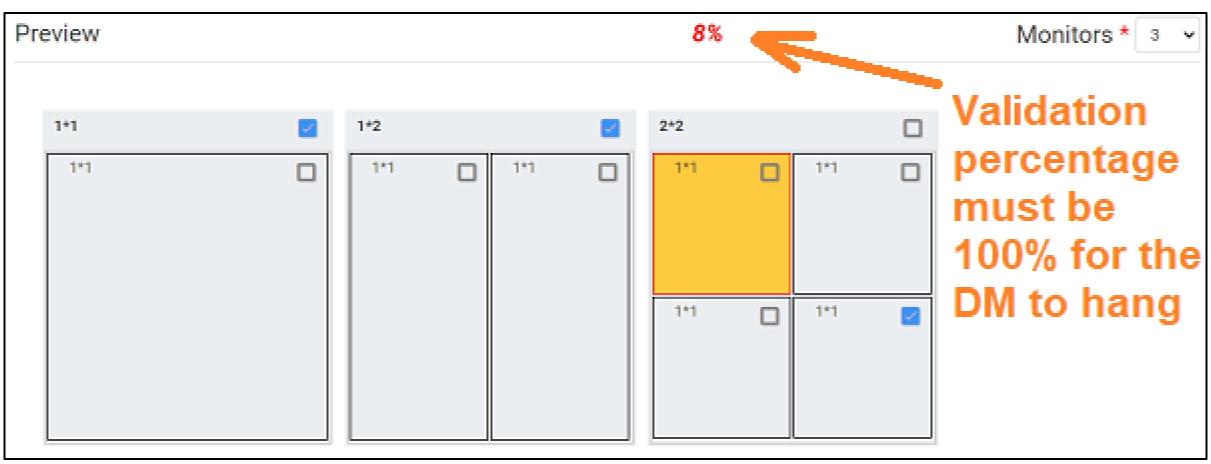


Figure. In this example, 3 pages (monitors) are configured, with 1, 2, and 4 cells added to each page, respectively. On the second page, Allow Missing Cells is selected at the page level, which means that either the left, right, or both cells do not have to match. On the third page, the study will hang 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.

Add general matching rules

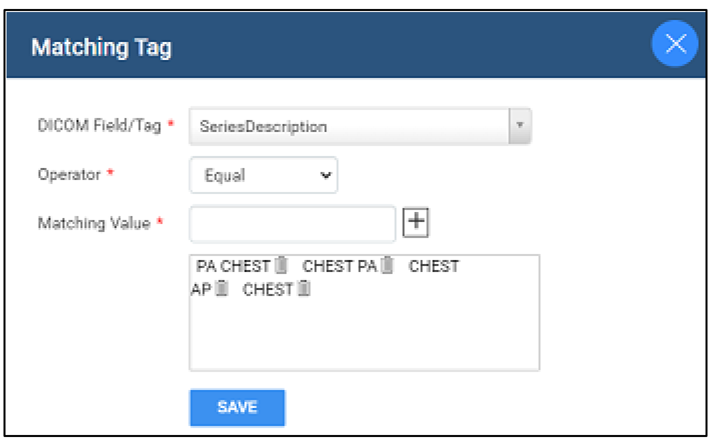
Matching rules define which images can hang in which cells. The DM's modality, body part, and allow missing cell settings *roughly* define this, but you need matching rules to *finely* define this. The validation percentage tells you whether your rules are sufficient to hang the currently opened study--add matching rules until it reaches 100%. In addition to matching rules, you can also add prior rules (see later in this topic).

1. Under Preview, select a cell.
2. At the bottom of the window, on the MATCHING RULES tab, select ADD GROUP.

> Note: Adding a group to contain your rules is optional, but we recommend doing so for most applications because you can combine rules with AND/OR logic (see the OR dropdown in the figure below).

Result: The new group initially appears as a row of buttons under the ADD GROUP button.

3. In the group, select ADD GENERAL RULE.
4. In the Matching Tag dialog, enter the following settings.



This rule allows CTs with chest-related series descriptions to hang in the cell.

Setting	Description
DICOM Field/Tag	Select an item to match (the argument of the rule).

Setting	Description
Operator	Select a matching operator.
Matching Value	Type a value that must match for the rule to be satisfied, and then select the plus sign. Add as many values as could potentially match.

5. Repeat to add rules for all other cells, until the validation percentage is 100%.

   Note: The order of your rules matters. Images hang in the order of rules in the DM (previously, they hung in the order they appeared on thumbnails).

6. In DM Manager, select SAVE.

7. To automatically apply additional processing to cells, see Use the Display Management sub-tab.

Add a prior rule

If you want to hang priors in a cell, create a prior rule instead of a matching rule.

1. Select a cell, and on the Matching Rules tab, select ADD PRIOR RULE.

2. Select the index of the prior to hang:

   - ANY – Open any prior that matches
   - 1 – Open prior number 1
   - 2 – Open prior number 2

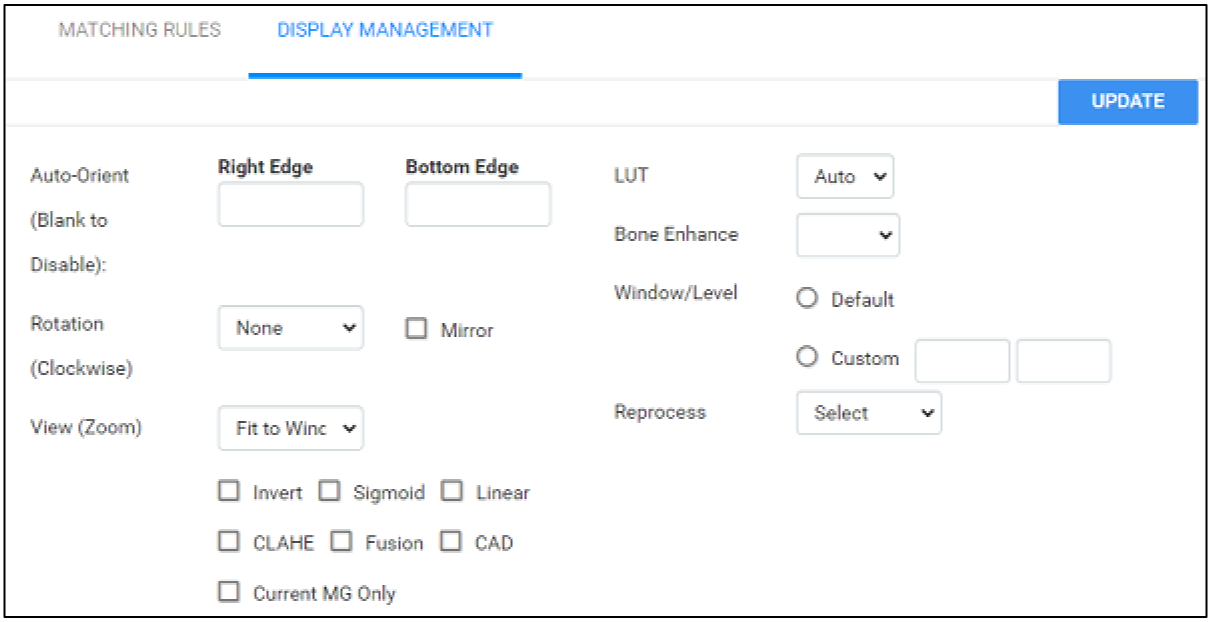
Use the Display Management sub-tab

To automatically apply additional processing to all images that hang in a DM, you can use the Display Management tab in the DM manager.

Procedure

1. In DM Manager, open a DM, and then select a cell.

2. On the DISPLAY MANAGEMENT sub-tab, enter the following settings.



Setting	Description
Auto-Orient	[Unused]
Rotation	Select a degree of clockwise rotation.
Mirror	Select to switch the left and right breast view.
View	Select a zoom type.
Invert Sigmoid Linear CLAHE Fusion CAD Current MG Only	Select one or more processing functions to apply. Exempts the current cell from the Stack by View and Prior option.
CAD	Select to display CAD values according to the SR CAD settings when the user reaches this step of the hanging protocol.
LUT	Select an LUT to apply.
Bone Enhance	Select a percentage of bone enhancement.
Window/Level	Select Default or Custom. If Custom, type the values to apply.
Reprocess	Select to generate an additional view from the base view.

3. Select UPDATE, and then SAVE.

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, neither current nor prior image hang unless you select to allow missing cells.

It can be 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.

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. Available for all modalities except mammography.

> Caution: 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.

Procedure

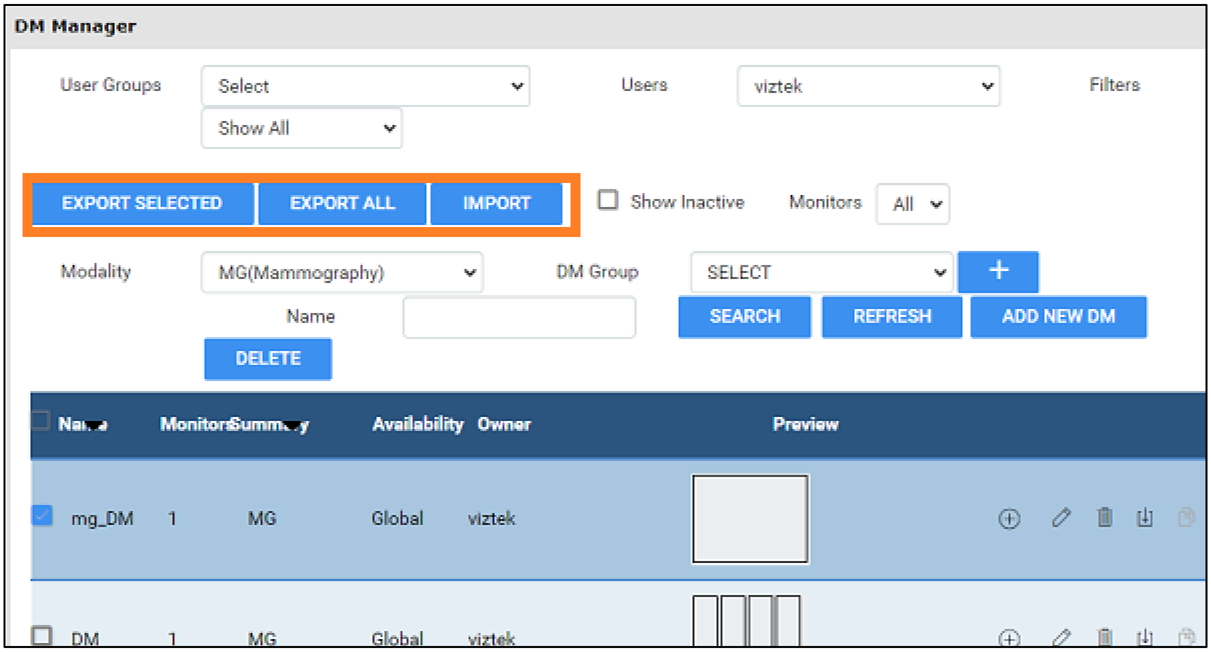
1. Open a study in the viewer and configure the display to your liking.
2. On the toolbar, select the DM button, and then in the button shortcut menu, select DM Save.
3. In the DM Information dialog, type a name for the DM and select or clear the Private checkbox.
4. Select SAVE.

Export and import DMs

You can import and export DMs for use in other Konica Minolta systems.

Procedure

1. On the viewer toolbar, select the display manager  button.
2. In the button shortcut menu, select DM Manager.



3. Select EXPORT SELECTED or EXPORT ALL.

   The DMs are added to a single JSON file and downloaded to your computer.

4. Copy the file to the destination system, display the DM Manager dialog, select IMPORT, and then open the exported JSON file.

Use DM groups

DM groups help you organize and share your DMs. This section contains the following topics (not all topics may be available depending on region and version).

Add a DM group
Share DMs with a DM group
Share DM groups with users
About DM groups and private DMs

Add a DM group

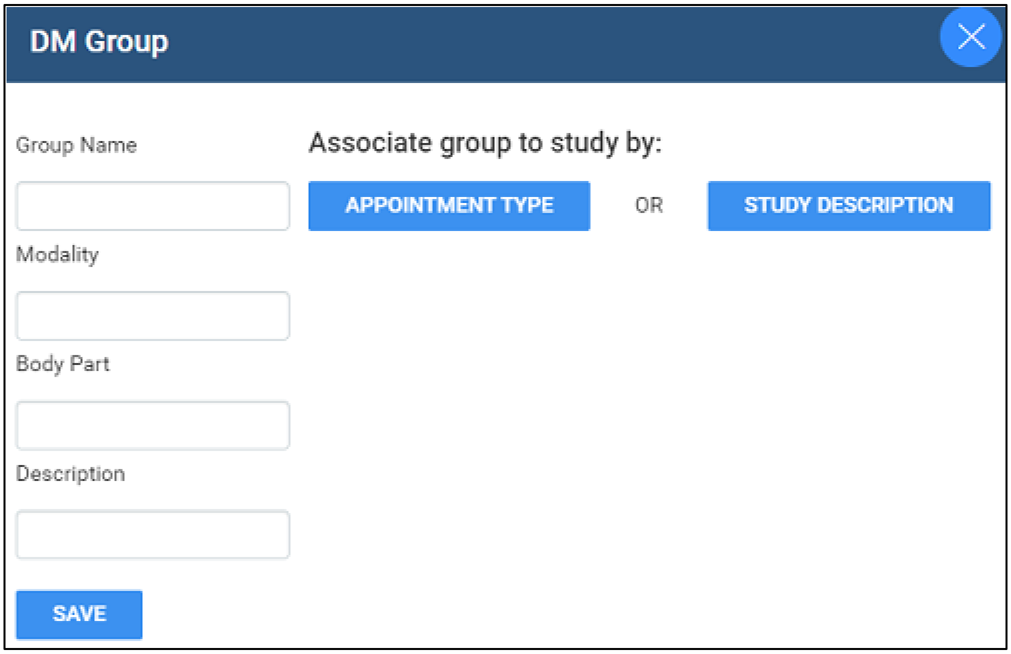
To organize your hanging protocols, you can place them in groups. To add a group:

Procedure

1. Go to SETUP > OFFICE > 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:

Procedure

1. Go to SETUP > OFFICE > 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:

Procedure

1. Go to SETUP > OFFICE > 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.

More example DMs

This section contains the following topics (not all topics may be available depending on region and version).

Example DM with a general matching rule

Example DM for ultrasound

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.

1. For the modalities in the example, configure viewer settings (see Configure viewer settings for DMs).
2. Open a US study of the relevant type in the viewer.
3. Click the DM button, and on the button shortcut menu, click DM Manager.
4. Select the relevant modality and then click ADD NEW DM.

Add the DM

1. In Name box, type US TEST.
2. the Modality list, select US.
3. In the Monitors box, 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.

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.

This chapter contains the following sections.

Find and open a patient chart

This section contains the following topics (not all topics may be available depending on region and version).

Find a patient chart by entering search criteria

You can find an existing patient chart by searching on various patient demographics.

> Caution: For recommended security, please turn off Chrome autofill. A password and/or patient information is configured or used on this page.

Procedure

1. Go to PATIENT > SEARCH.

   > Note: If the tab bar is hidden, select the arrow next to Patient to display it.

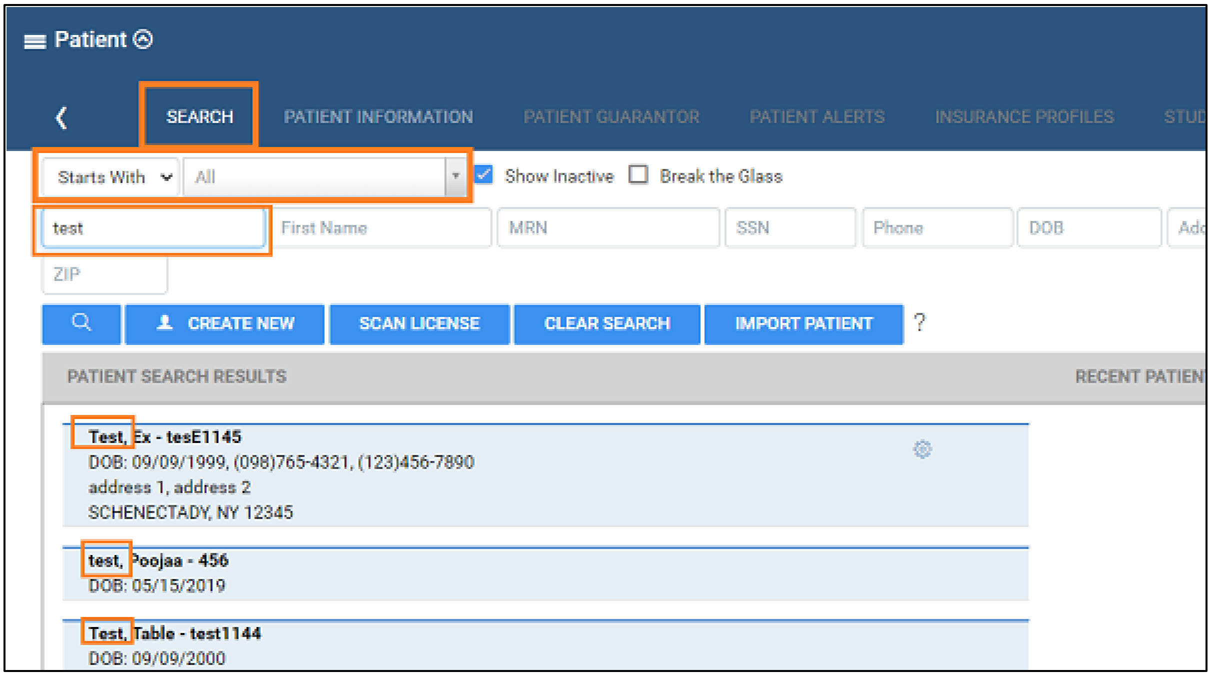
2. In the Starts With dropdown list, select a target for your search criteria.

   This target applies to all boxes in the search bar.

3. Optional: To narrow the scope of your search, in the All dropdown list, type or select a search filter (these are typically facilities).

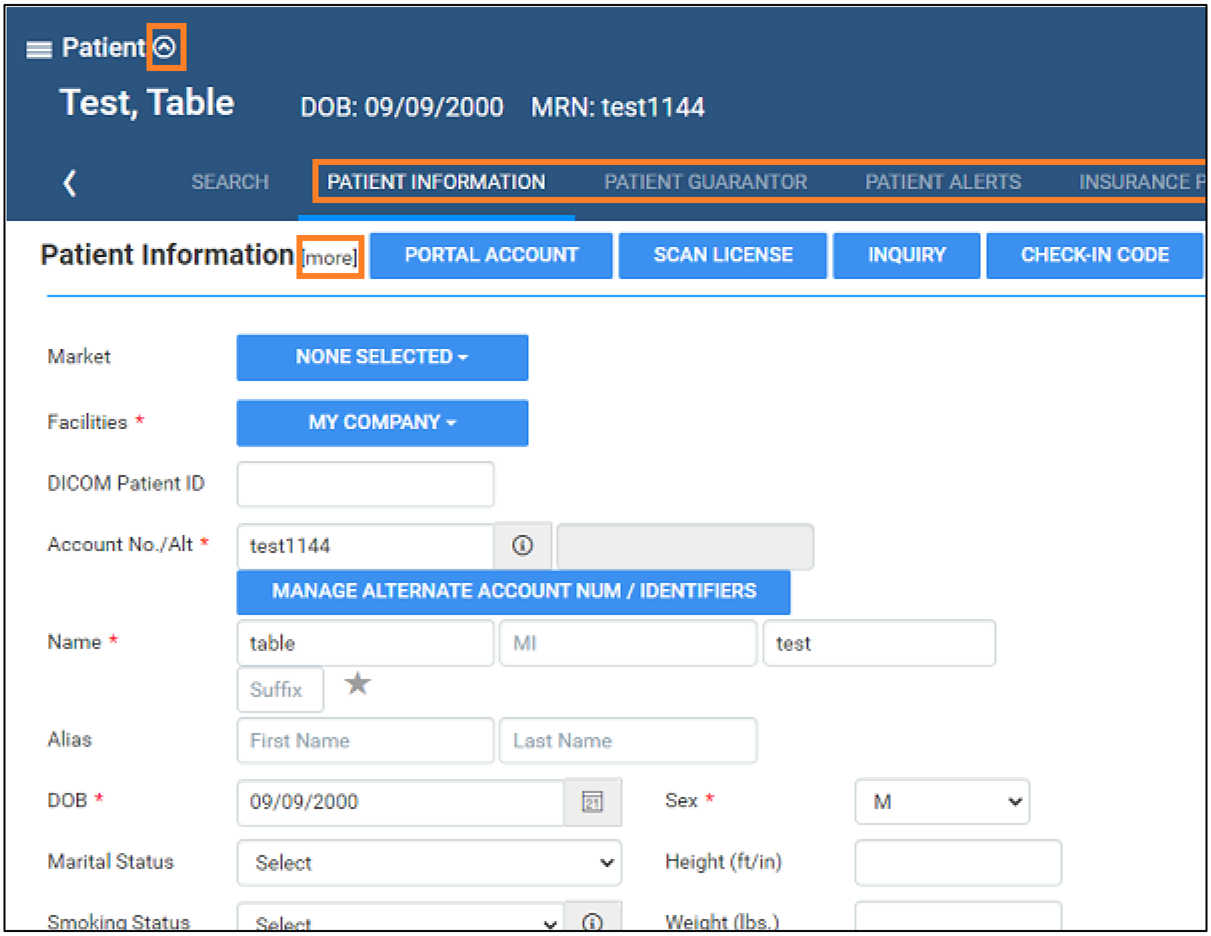
4. In the search bar, in one or more of the boxes, type one or more characters as search criteria.

   Result: Patient charts matching your criteria appear in the list.



5. Double-click a patient row, such as Test, Table in the figure above.

Result: The patient chart opens to the Patient Information tab.



6. To view more fields, click [more].

7. To view more pages, next to the Patient page title, select , and then select a tab (such as PATIENT GUARANTOR, or INSURANCE PROFILES)

See also:

[Create a patient chart](#)
[Find a patient chart by scanning a driver's license](#)
[Edit basic patient information](#)
[Edit other patient information](#)

Find a patient chart by scanning a driver's license

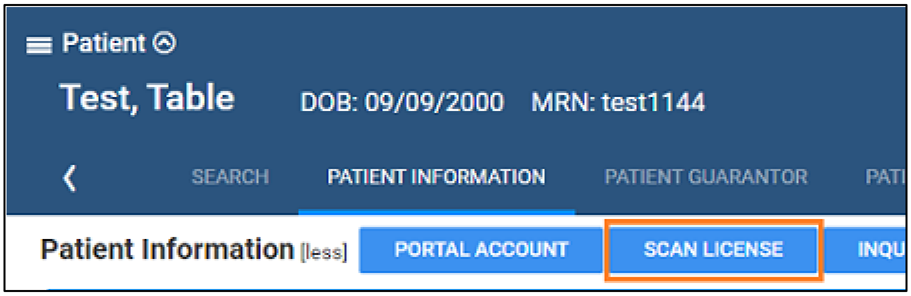
You can find an existing patient chart by scanning a driver's license.

Procedure

1. Go to [PATIENT](#) > SEARCH.

Note: If the tab bar is hidden, select the arrow next to Patient to display it.

2. Select SCAN LICENSE.



3. Use your barcode reader to scan the driver's license.

   The results appear in the PATIENT SEARCH RESULTS list.

Access confidential patient records (break the glass)

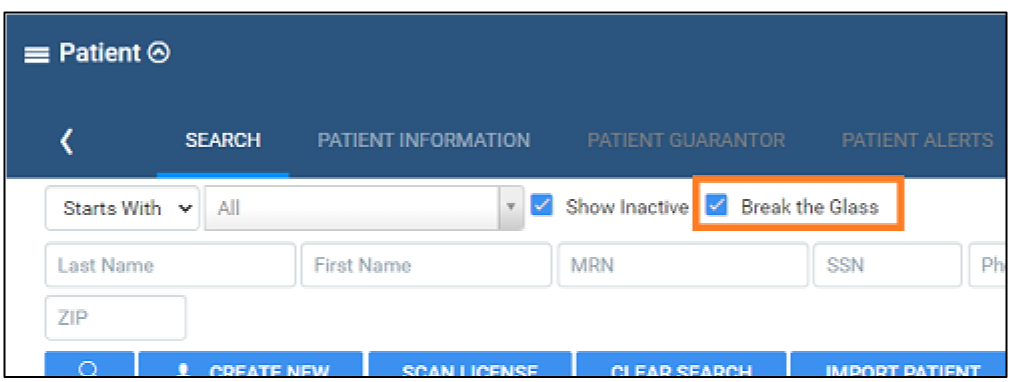
In emergencies you can use the Break the Glass function to open patient records that are usually off limits. All Break the Glass operations are added to the audit trail report. Users of type Associated Patients Only can also "break the glass" from the New Appointment screen. To "break the glass" in the patient search screen or on the physician's portal, follow the steps below.

Prerequisites:

- Configure access reasons (see App settings).
- Obtain the Break the Glass user right (see Create a user role).

On the patient chart search screen

1. Go to PATIENT > SEARCH, and select the Break the Glass checkbox.



2. Find a patient chart in the usual manner.

On Physician Portal

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.

Create and modify a patient chart

This section contains the following topics (not all topics may be available depending on region and version).

Create a patient chart
Import a patient chart
Edit basic patient information
Edit other patient information
About the PID, MRN, and account numbers
Configure alternate account number functionality
Add alternate account numbers to a patient chart
Manage studies in the patient chart
Assign a guarantor for a patient
Send reports from the patient chart
Merge patient charts

Create a patient chart

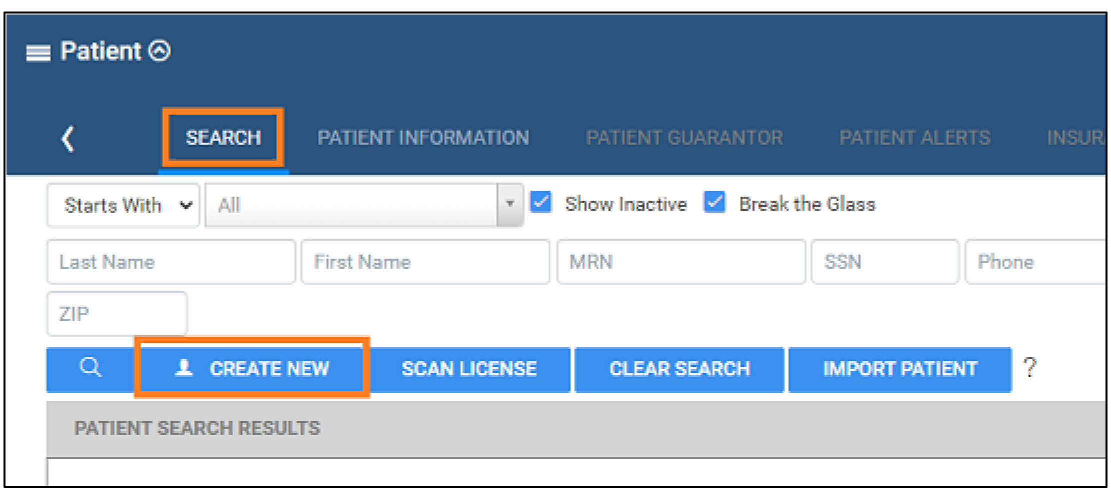
You can import a patient chart, or create one by following the steps below.

Caution: For recommended security, please turn off Chrome autofill. A password and/or patient information is configured or used on this page.

Procedure

1. Go to PATIENT > SEARCH > CREATE NEW.

   Note: If the tab bar is hidden, select the arrow next to Patient to display it.



2. Enter information in the PATIENT INFORMATION tab as described Edit basic patient information.

3. Select CREATE PATIENT.
4. Enter information in other tabs by referring to Edit other patient information.

Import a patient chart

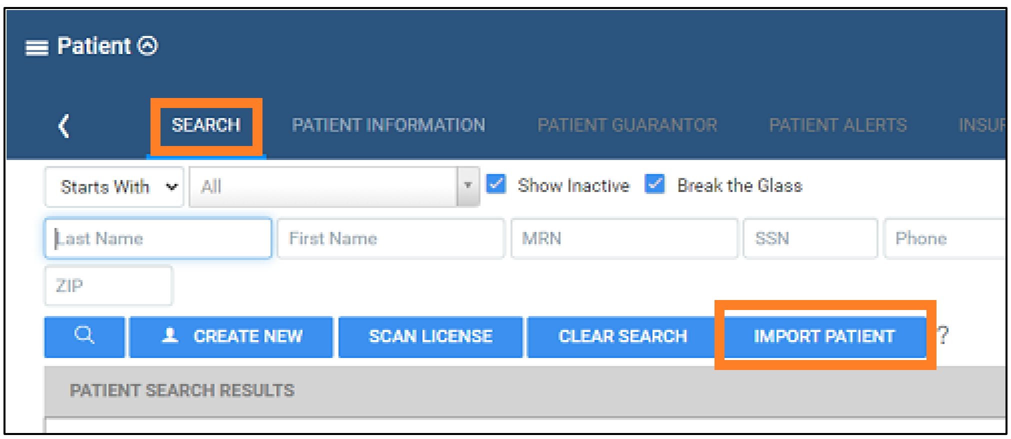
You can import a patient chart (.CSV) into Symmetry PACS. If the patient chart already exists in Symmetry PACS, the imported chart can update the existing one, or become a new record.

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.

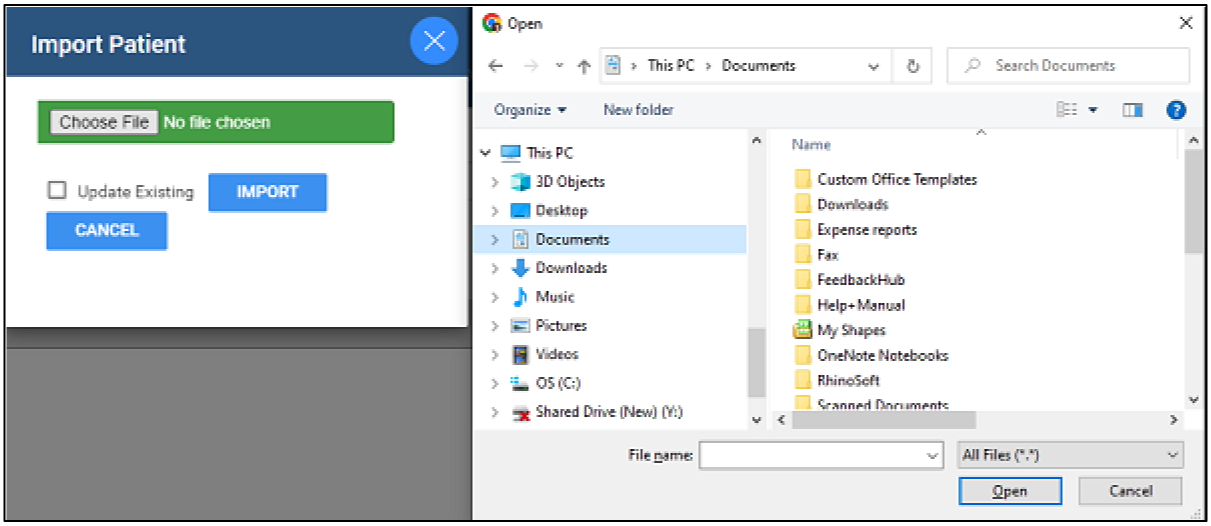
Procedure

1. Go to PATIENT > SEARCH > IMPORT PATIENT.

   Note: If the tab bar is hidden, select the arrow next to Patient to display it.



2. In the Import Patient dialog, select Choose File, and then browse for and select the file containing the patient record.



3. Optional. To update an existing patient record, select the Update Existing checkbox.

4. Select IMPORT.

Edit basic patient information

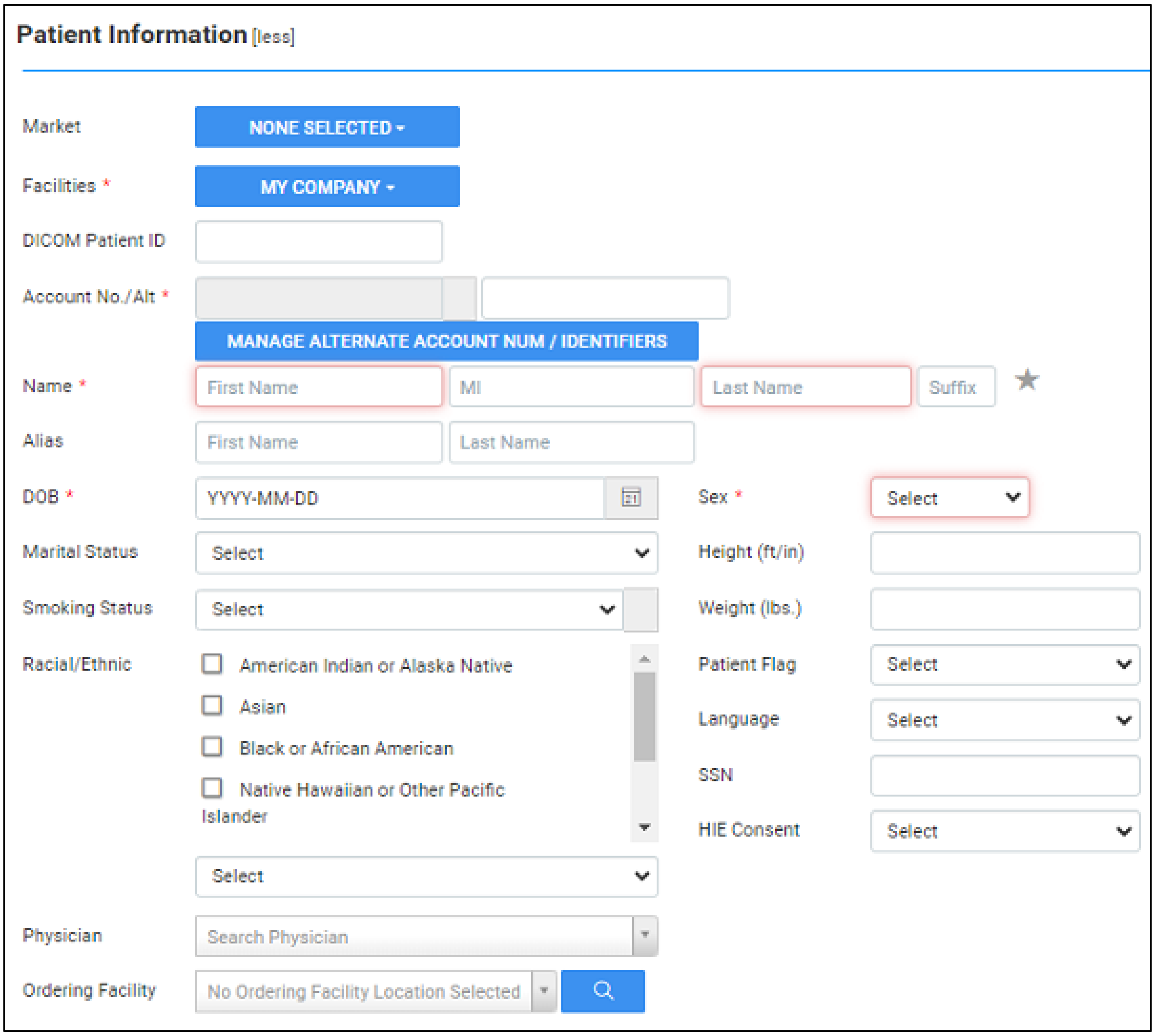
You can edit or add the basic information described below to a patient chart. You can also access these same settings from an order tab in the Edit Study screen.

Procedure

1. Go to PATIENT > SEARCH.

2. Find and open a patient chart (see Find a patient chart by entering search criteria).

3. On the PATIENT INFORMATION tab, type or select information for the following options.



Actual settings may vary by region and version

Setting	Description
Market	Select the markets that serve the patient.
Facilities	Select facilities that serve the patient.
DICOM Patient ID	Type the PID or patient MRN.
Account No./Alt.	Type the patient's account or alternate account number. See About the PID, MRN, and account numbers
Name	Type the patient's first, and last name. Optional: Type the middle name, middle initials, and/or suffix.
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.

Setting	Description
	Dropdown list: Select the Hispanic or Latino ethnicity or non-ethnicity.
Physician	Select the patient's primary physician.
Ordering Facility	Available when using Mobile RAD. Select the ordering facility location or contact that serves the patient.
Sex	Select the sex of the patient.
Height/Weight	Type the patient's height and weight.
Patient Flag	Select a patient flag.
Language	Select the patient's preferred language.
HIE Consent	Select whether the patient has consented to release of demographics and medical data through a Health Information Exchange for treatment, payment, and health care operations purposes.
Select [more] next to words Patient Information to view the following settings	
License No./Province	Type the patient's driver's license number, and select the issuing state.
Exp. Date	Select the expiration date of the driver's license.
Emp. Status	Select the patient's employment status.
Employer Name	Type the name of the patient's employer.
Emp. Address	Type the street address of the patient's employer.
City/Province/Postal	Type or select the city, state or province, and ZIP or postal code of the patient's employer.
Phone/Fax	Type the phone and/or fax number of the patient's employer.
Reason for Death	If the patient is deceased, select the checkbox and then select the reason for death in the dropdown list.
Notes	Type any notes you wish to include in the chart.
Users Assigned	Dynamically search for and select a user 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.

4. Select SAVE.

See also:

[Edit other patient information]

[Create a patient chart]

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:

Procedure

1. Go to PATIENT > SEARCH.
2. Find and open a patient chart (see Find a patient chart by entering search criteria).

   Note: If the tab bar is hidden, select the arrow next to Patient to display it.

3. Select a tab and then enter settings.

Not all tabs shown

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	Exa PACS/RIS only.
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:

Edit basic patient information
Create a patient chart
Find a patient chart by entering search criteria

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

About issuers of PID

An *issuer* is the primary system (such as an EMR) that an institution uses to generate account numbers for their medical records. As such, it is not specific to a facility. For example, one institution could have 10 facilities, but only 3 account number systems (issuers). When importing or migrating customer medical records into Exa PACS/RIS in such cases, specifying issuers and alternate account numbers ensures that patients with duplicate primary PIDs/MRNs can be added without conflicts.

See also:

Configure alternate account number functionality
Add alternate account numbers to a patient chart

Configure alternate account number functionality

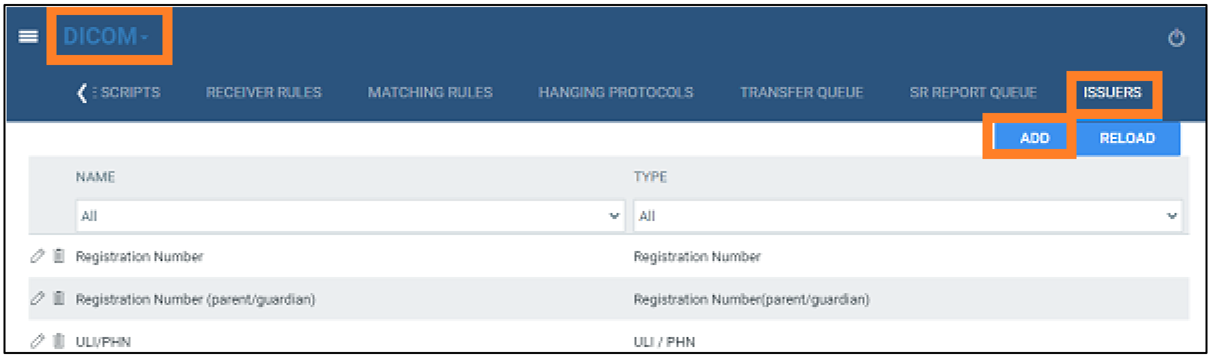
To be able to use alternate account numbers, perform the following procedures. Alternate account numbers can be PIDs or MRNs, and in Canada they can also be ULI/PHNs or registration numbers.

Configure an issuer of a PID

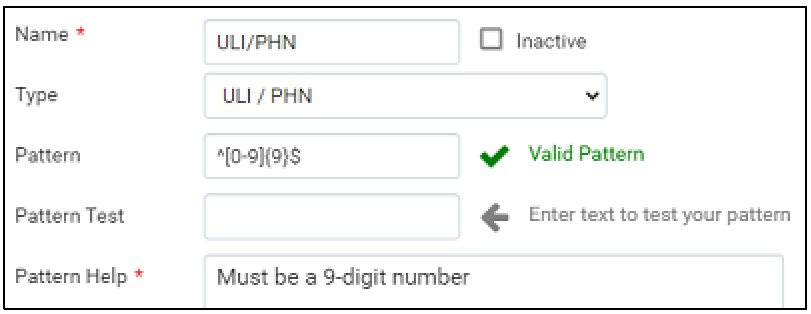
The *issuer of a PID* is an alias for the facility that issued the incoming PID (or MRN, ULI/PHN, registration number, or account number). You must configure an issuer of a PID in advance for each facility whose PIDs you want to use as alternate account numbers.

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. Go to SETUP > OFFICE > DICOM > ISSUERS.



2. On the > ISSUERS select ADD.



3. Type a Name for the issuing entity, and select a Type.
4. Optional. In the Pattern box, type a regular expression. Exa PACS/RIS will prevent users from adding PID/account numbers that fail to match the expression.

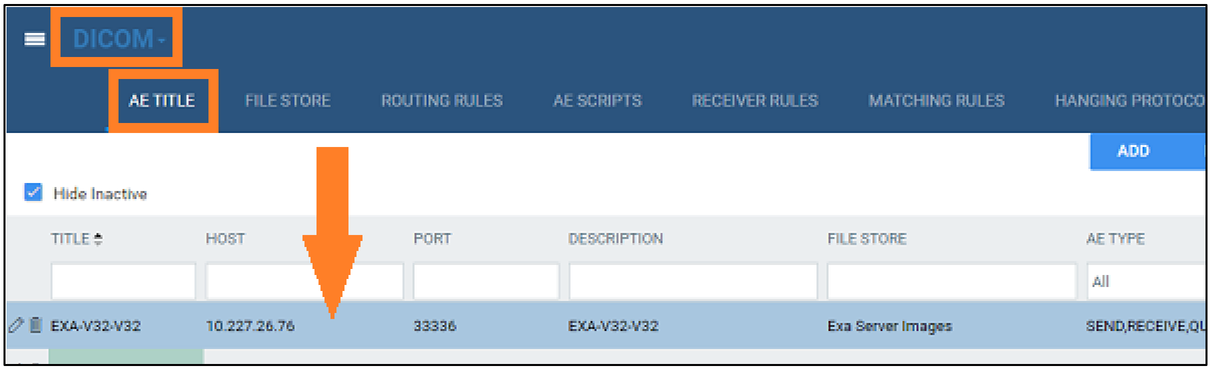
> Example 1.Type the pattern: AB?
>
> Means: PIDs and account numbers must start with AB and be followed by one character, such as AB1, ABC, and ABz.
>
> Example 2. Type ^[0-9]{9}$
>
> Means: Nothing in front of the number, a digit from 0 to 9, 9 instances of such a digit, nothing after the number.

5. Optional: In the Pattern Test box, type a known alternate account number to make sure it matches your regular expression.
6. In the Pattern Help box, type the requirements for the number to help the user.
7. Select SAVE.

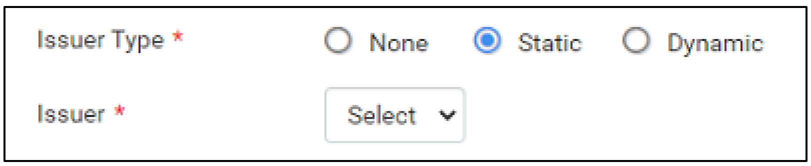
Designate AEs to use alternate account numbers

For each application entity that receives studies whose account numbers (or MRNs, PIDs) you want to use as alternate account numbers, configure the following:

1. Go to SETUP > OFFICE > DICOM > AE TITLE.
2. Double-click an AE in the list to open it.



3. Under Issuer Type, select Static or Dynamic. If you select Static, in the Issuer dropdown list, select the issuer.

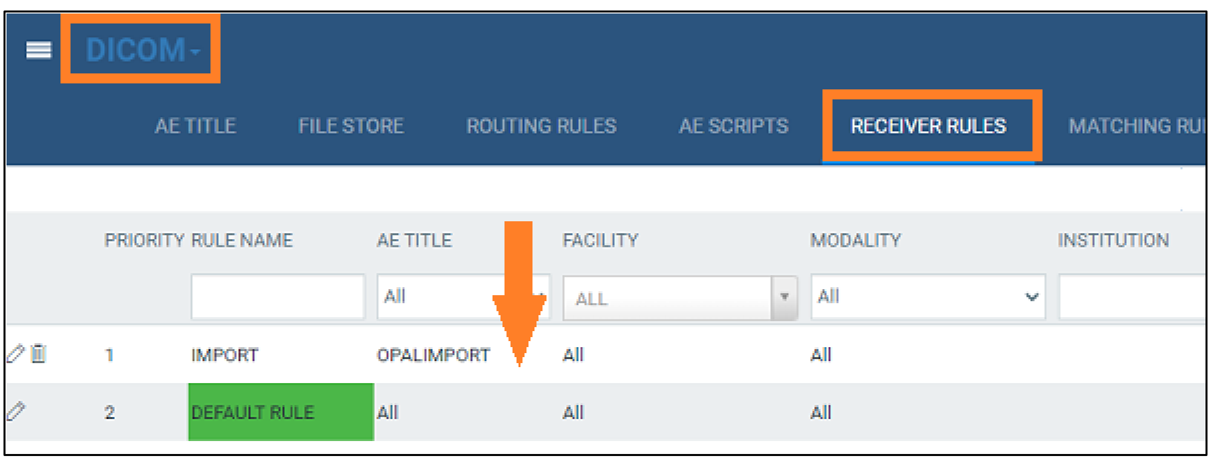


4. Select SAVE.

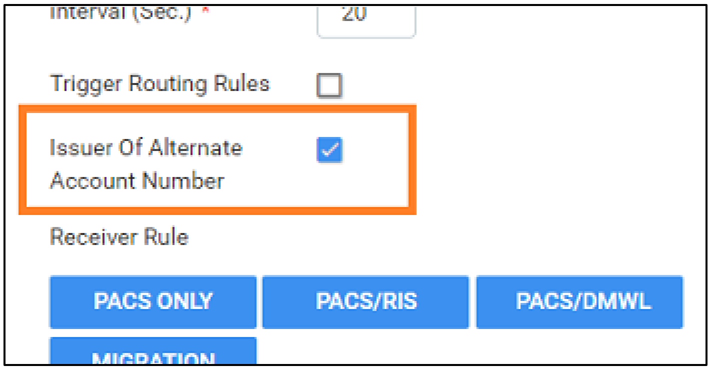
Configure a receiver rule for use with alternate account numbers

For each relevant receiver rule:

1. Go to SETUP > OFFICE > DICOM > RECEIVER RULES.
2. Double-click a receiver rule in the list to open it.



3. Under Rule Information and Filter, select the Issuer of Alternate Account Number checkbox.



4. Select SAVE.

See also:

About the PID, MRN, and account numbers
Add alternate account numbers to a patient chart

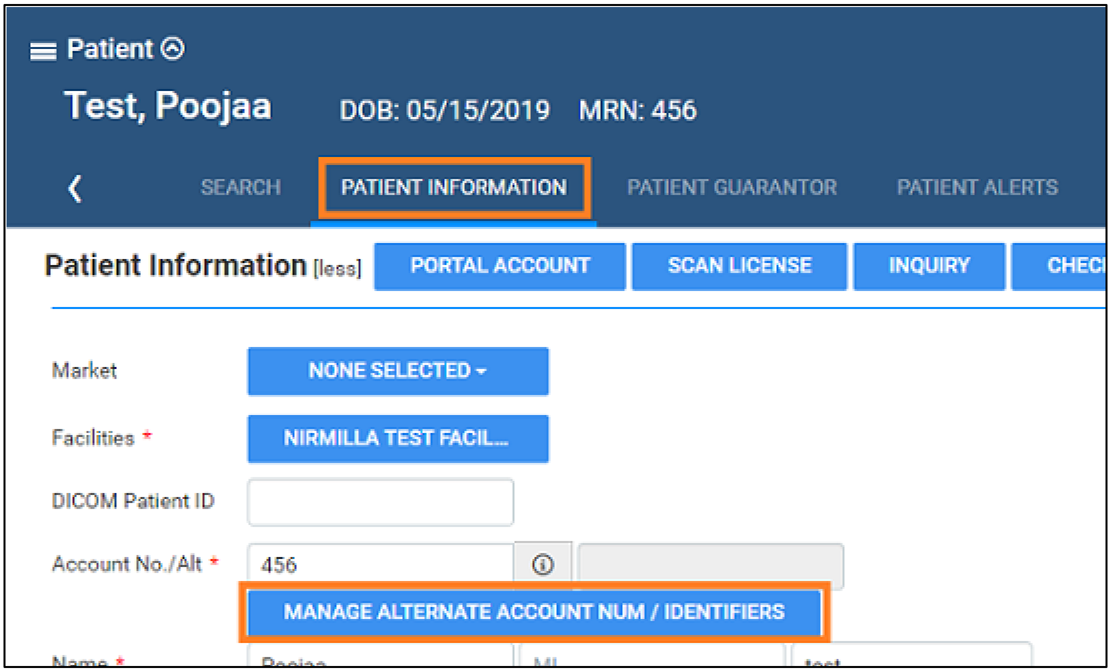
Add alternate account numbers to a patient chart

By adding alternate account numbers to an existing patient chart you can link multiple charts or records from the same patient together. Complete the following steps.

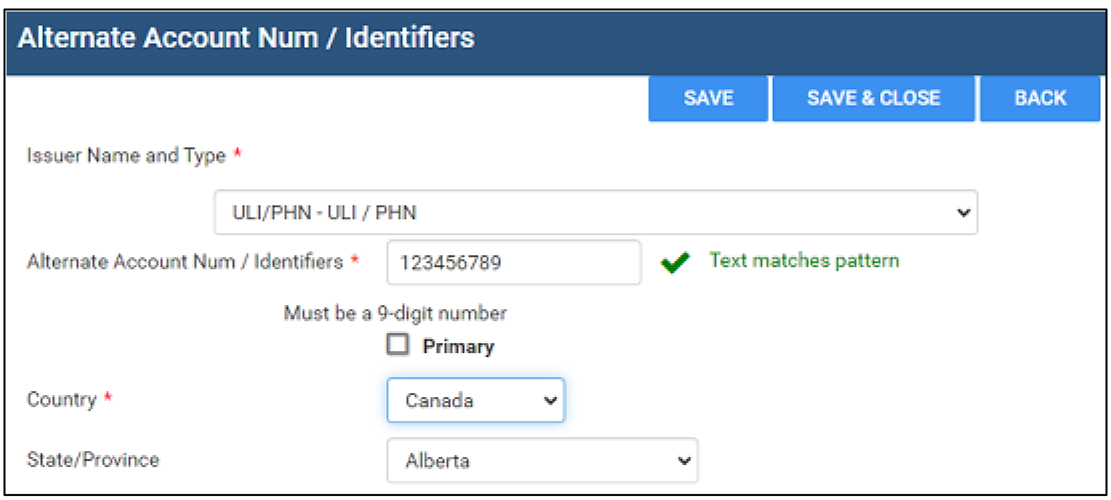
Prerequisite: Configure alternate account number functionality.

Procedure

1. Open the patient chart to which you want to add alternate account numbers (see Find a patient chart by entering search criteria).
2. On the PATIENT INFORMATION tab, select MANAGE ALTERNATE ACCOUNT NUM/IDENTIFIERS.



3. In the Alternate Account Num/Identifiers dialog, select ADD.
4. In the Issuer Name and Type dropdown list, select an option, and then type the alternate account number or identifier.



5. If using multiple alternate account numbers, select the Primary checkbox if you want the current number to be the primary one.
6. Select the country and state/province where the number is valid.
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](#)
[Merge patient charts](#)

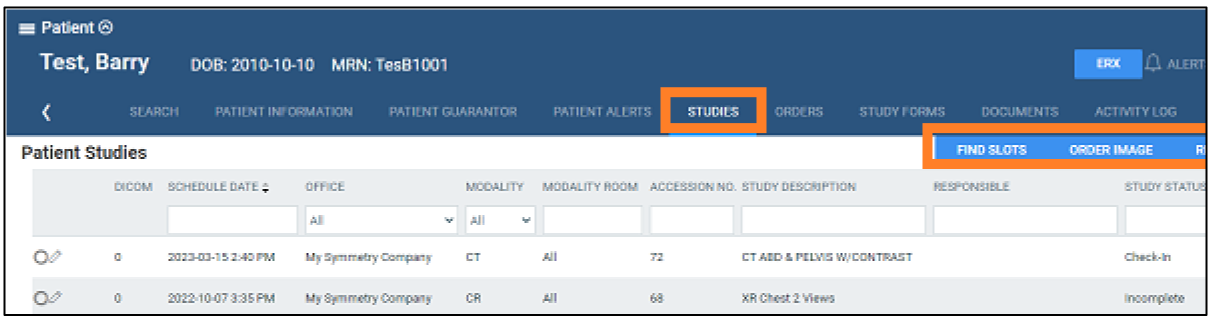
Manage studies in the patient chart

From the STUDIES tab of the patient chart you can view payment status and other information of prior or future studies of the patient, and create a new study with the Find Slots feature.

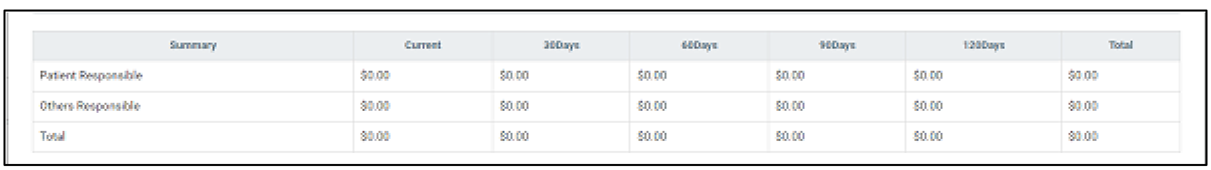
Procedure

1. Go to [PATIENT](#) > SEARCH.
2. Find and open a patient chart (see [Find a patient chart by entering search criteria](#)).

> Note: If the tab bar is hidden, select the arrow next to Patient to display it.



Main screen



Summary	Current	30Days	60Days	90Days	120Days	Total
Patient Responsible	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Others Responsible	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

Payment status summary at bottom of screen

3. 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. See also [Send reports from the patient chart](#).
View the claim inquiry screen	Right-click a study that has claim history, and then select Claim Inquiry.
Schedule an ordered study	Right-click an unscheduled study, and then select Schedule Appointment to open the study in the Find Slots screen (see Use the Find Slots feature).

Task	Topic
Create a study for the patient	Select Find Slots (see Use the Find Slots feature).
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.

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.

Procedure

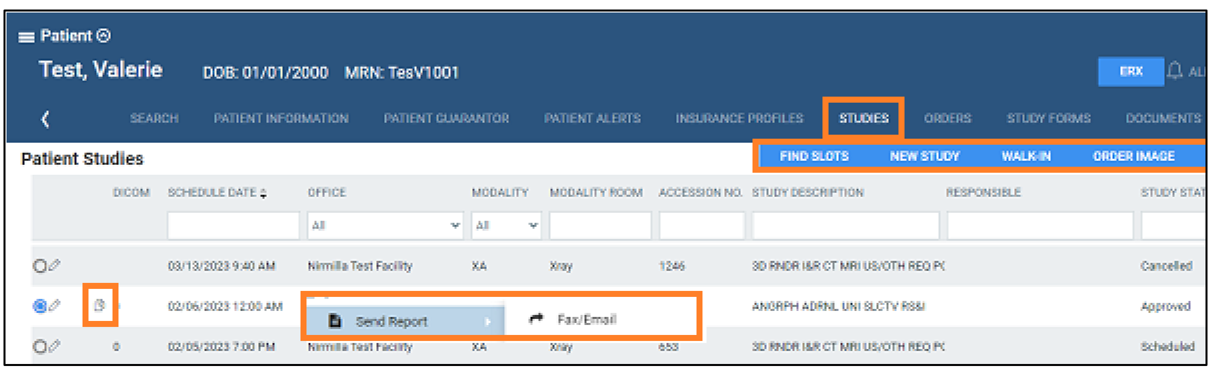
1. Find an open the patient’s chart.
2. On the PATIENT GUARANTOR tab, select ADD.
3. Enter the information for the guarantor, and then select SAVE.

Send reports from the patient chart

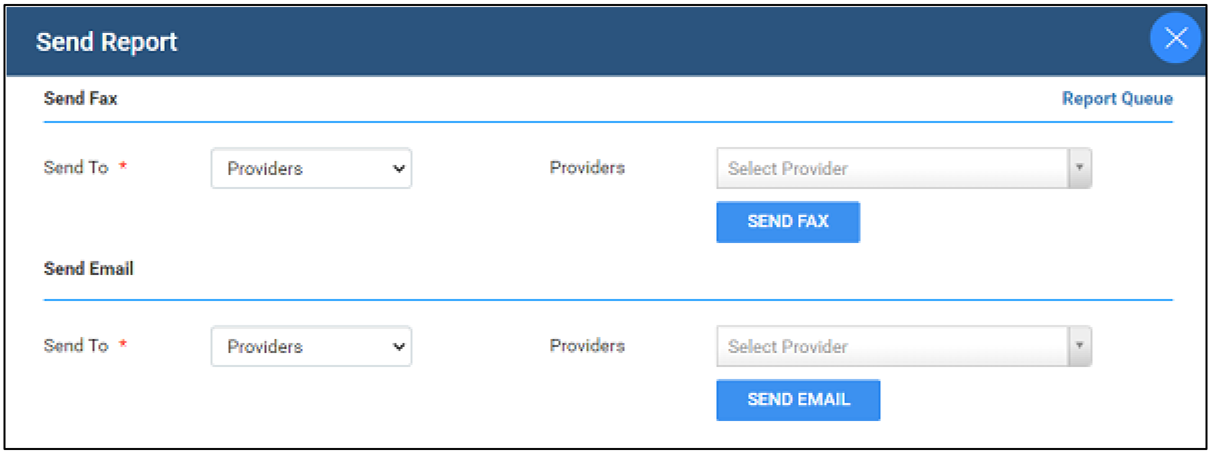
You can send approved reports by email or fax directly from the patient chart to other providers and other related parties.

Procedure

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.

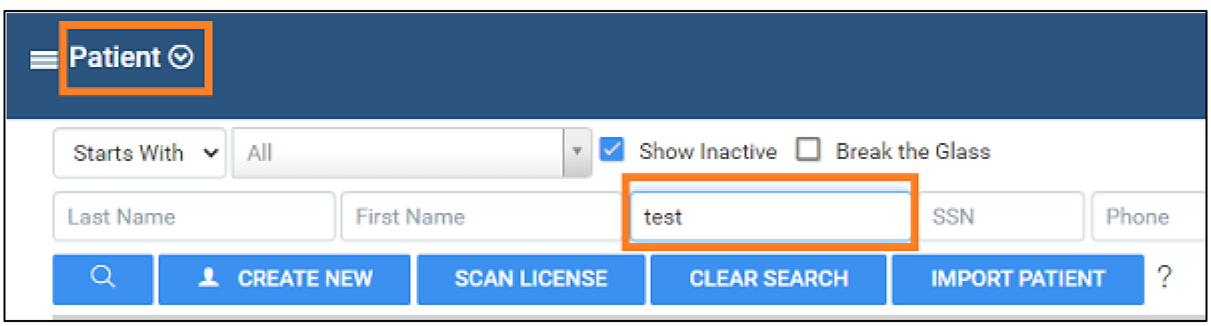
   b. In the dropdown list on the right, select an individual recipient.

4. Select SEND FAX and/or SEND EMAIL.

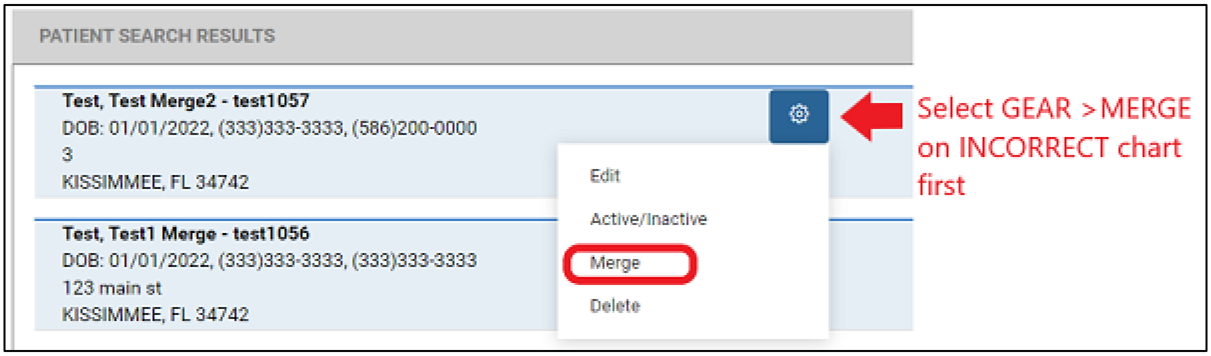
Merge patient charts

As an alternative to using alternate account numbers, if two patient charts are accidentally created for a single patient, you can merge the charts.

1. Go to PATIENT > SEARCH.
2. In the MRN box, enter the account number of the records to merge.



3. In the list of results, select the row containing the *incorrect* patient chart, hover and select the settings button, and then select Merge.



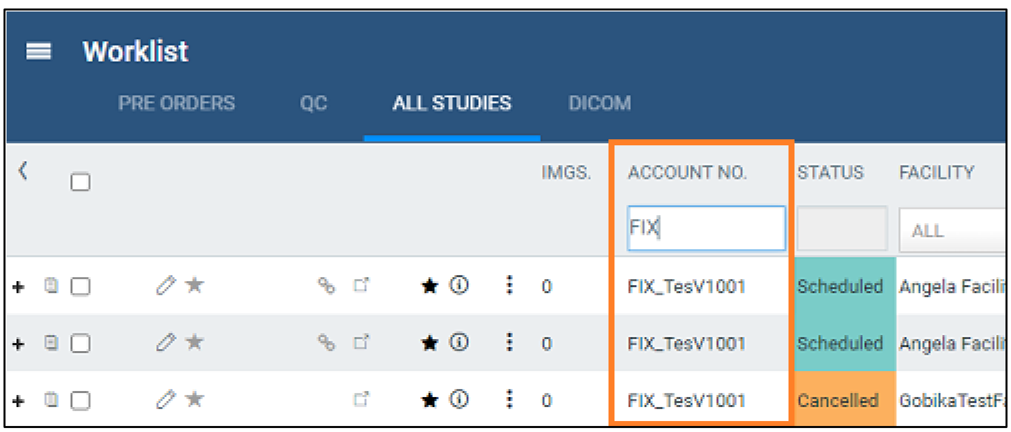
4. Repeat the previous two steps for the row containing the *correct* patient chart.

5. In the Patient Merge screen, confirm the contents of the merge and then select MERGE.

Merge a "FIX_" study

If the DOB, gender, first name, and last name of a new patient chart are the same as an existing one, Symmetry PACS prepends "FIX_" to the account number in the worklist. You can fix these by merging them with the existing chart. 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.

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 to determine whether they are for the same patient.

5. If the same, merge the records by following the earlier procedure.

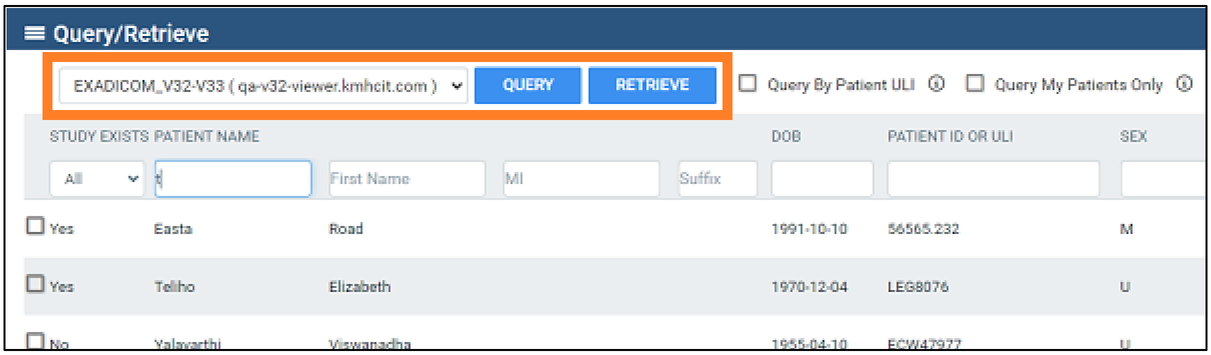
Work with query and retrieve

The Query/Retrieve feature enables you to look up patients in the Exa platform database, but also other databases that you configured as AEs.

Prerequisite: Configure DICOM settings for the server to query and for Symmetry PACS on the server.

Procedure

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 select QUERY.

   - Use the Study Exists list to filter studies that are already in or not in the Exa platform database.
   - You can use the asterisk (*) and question mark (?) wildcard characters in the account number, accession number, referring physician, and study description fields.

4. Optional. To retrieve all matching studies, select RETRIEVE. To retrieve some matching studies, select the studies, right-click, and then select Retrieve.

Work with reports

Symmetry PACS provides tools to easily create a wide variety of reports to help you manage your healthcare facilities and resources.

Create, view, and deliver reports

This section contains the following topics.

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. Note that *reports* here does not include approved reports from radiologists.

Procedure

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).

   Result: The report is created, and automatically saved to My Reports.

View your created reports

Reports that you create are automatically placed in the My Reports area where you can open and download them.

Procedure

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

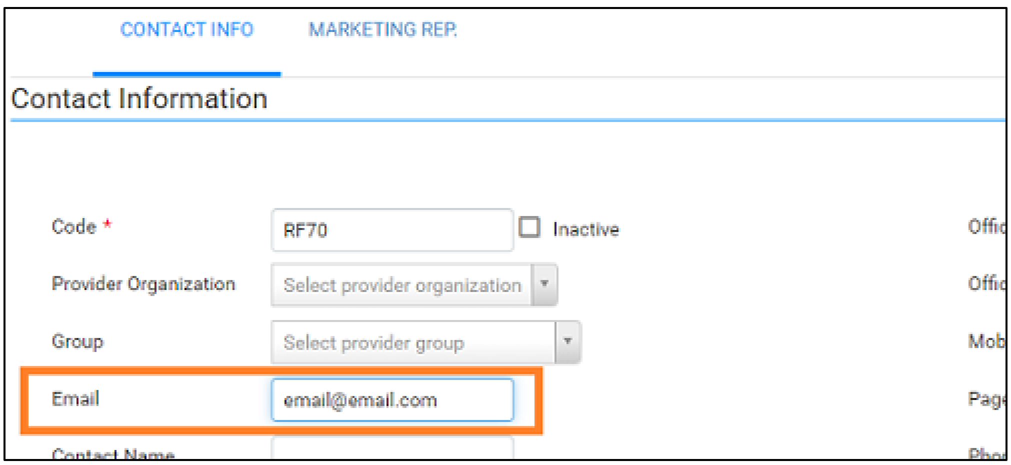
You can configure Symmetry PACS to automatically send reports and images through email to specified provider locations/contacts and their provider groups.

Prerequisite: Add a referring physician or ordering physician to any studies whose reports you want to send (see Edit study information).

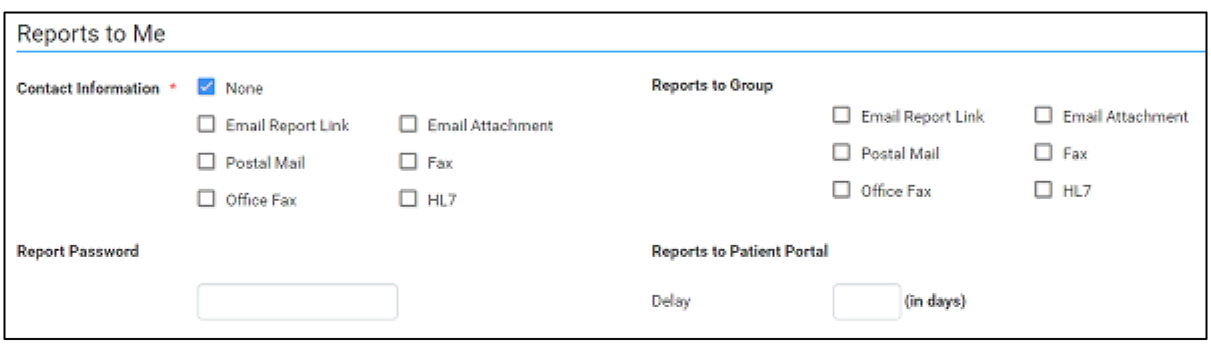
Caution: A password or patient information is configured or used on this page. For recommended security, turn off Chrome autofill.

Procedure

1. Go to SETUP > OFFICE > Providers & Resources > RESOURCE.
2. In the list of resources, double-click a resource of type Provider-Radiology or Referring Provider.
3. On the LOCATIONS/CONTACTS sub-tab, double-click a location/contact in the list.
4. 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. Auto-Print: Select a printer in the dropdown list to automatically print reports.
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.
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). You can access Tools from the burger menu (Burger > TOOLS > [Tool Name]). For more information, see the following topics.

Tool	Description
Exa Dictation	The entry-level radiologist dictation tool. Install Exa Dictation Exa Dictation and transcription with Web Trans
Client Service	Enables Local Cache. Install and configure local cache Use local cache
Chrome Extension	Enables Chrome to work with multiple monitors. Add the Chrome extension Set up connected displays
Opal Tools	Client-side application for importing, CD importing, and CD burning. Install OPAL tools Burn studies, series, or images to media Import DICOM images Import studies from CD Import studies to a specific AE (API mode)
Opal Viewer	Formerly "Opal Viewer," now called the "Exa Client Viewer." An alternative to the Exa PACS/RIS viewer that includes specialty annotations (such as for Chiropractic Install Exa Client Viewer Open a study in a viewer
Exa Trans	The main client-side transcription application. Install Exa Trans Dictation and transcription with Exa Voice and Exa Trans
Exa Scans	Provides document scanning functionality. Install Exa Scans Attach (upload, scan) non-DICOM documents Attach (upload, scan) DICOM documents
Exa Launch	Enables integration with third-party applications. Install Exa Launcher Configure integration with third-party apps
CD Import	Opens OpalImport directly.
Mobile Rad	Downloads the apk file to install Mobile Rad on a mobile device. See the Mobile Rad user's manual. See also: Work with mobile radiology

Use import tools

With the import tools provided in the program, you can Import studies from CD and Import studies to a specific AE (API mode).

Import studies from CD

You can perform a “CD import.”

Caution: Ensure that the data to be imported, and the data after import, are correct.

Prerequisite: Install Opal tools.

Procedure

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.

Procedure

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. For instructions on how patients can use Patient Portal, see the Patient Portal user's manual.

For staff, see About creating a patient portal account.

About creating a patient portal 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:

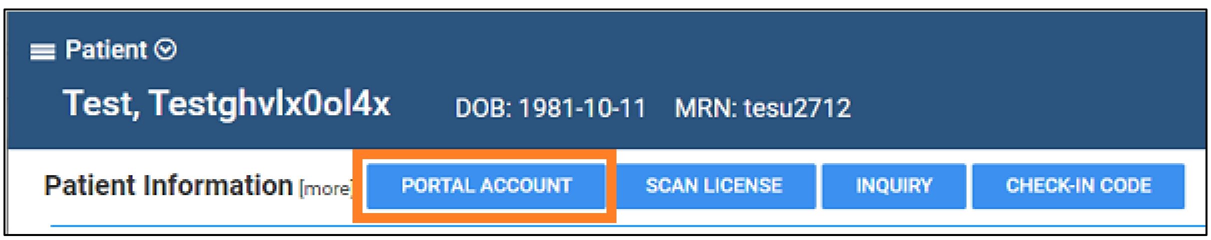
1. In-Person Registration initiated by staff: Create a patient portal account

2. Online Patient Registration initiated by the patient: Patient self-registration

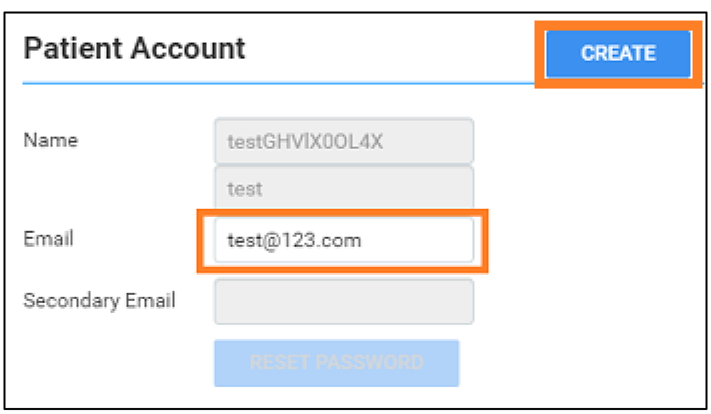
Create a patient portal account

The recommended workflow to create a patient portal account begins when you are scheduling an appointment.

1. Open the patient's chart, and at the top of the screen, select PORTAL ACCOUNT.



2. In the Create Portal Account dialog, confirm the patient's email address, and then select CREATE.



Result: An email is sent to the patient with a link to Patient Portal. The patient does the following:

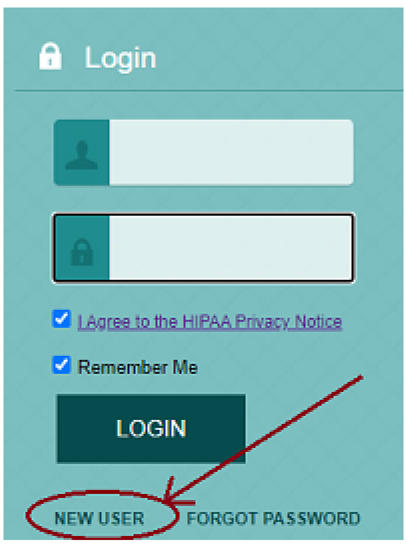
- Selects the link (or pastes it into the browser) to open the create password page of the Patient Portal.
- Types a password and selects the button.
- On the Login page, enters their password and selects LOGIN to open the portal.

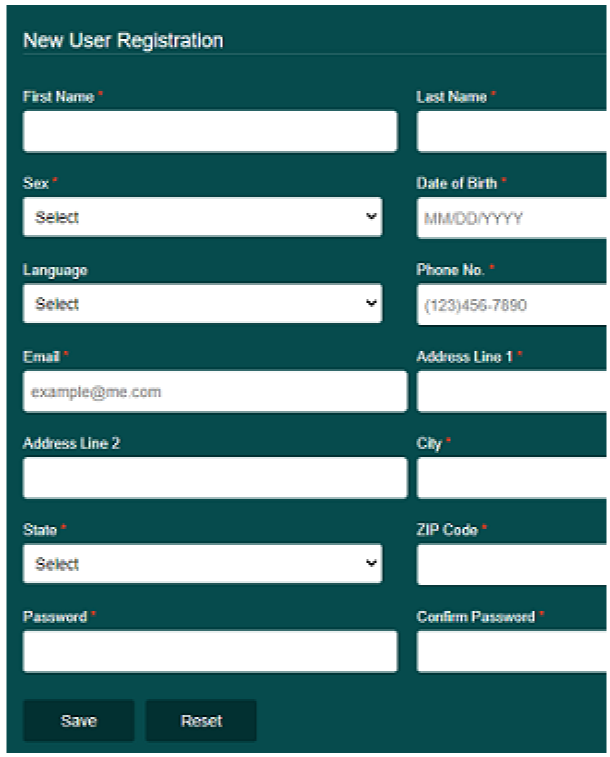
3. In the Create Portal Account dialog, select SAVE.

Patient self-registration

If the patient already has a chart in Exa PACS/RIS, they can initiate creating a portal account as follows.

1. On the patient portal sign-in screen, the patient selects NEW USER.





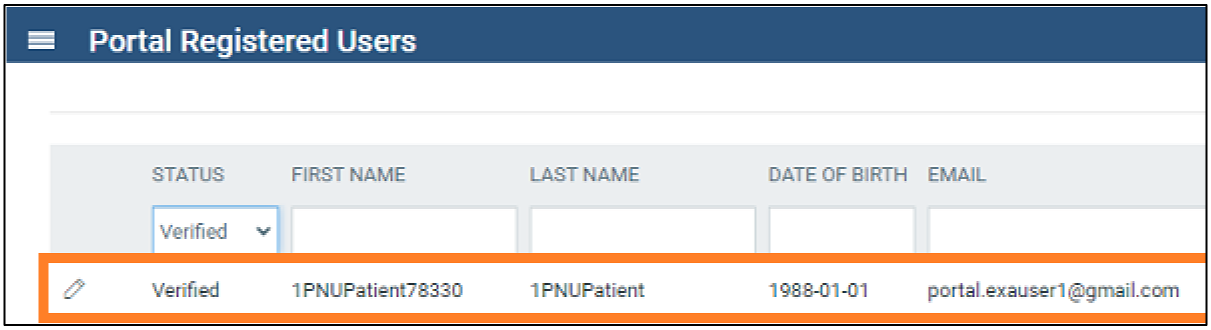
2. In the New User Registration dialog, the patient fills out the form, and then selects Save.

   Result: The demographics are sent to Symmetry PACS for linking by staff (see below), and the patient receives a verification email.

3. The patient opens the verification email and selects the link in the to verify their email address.

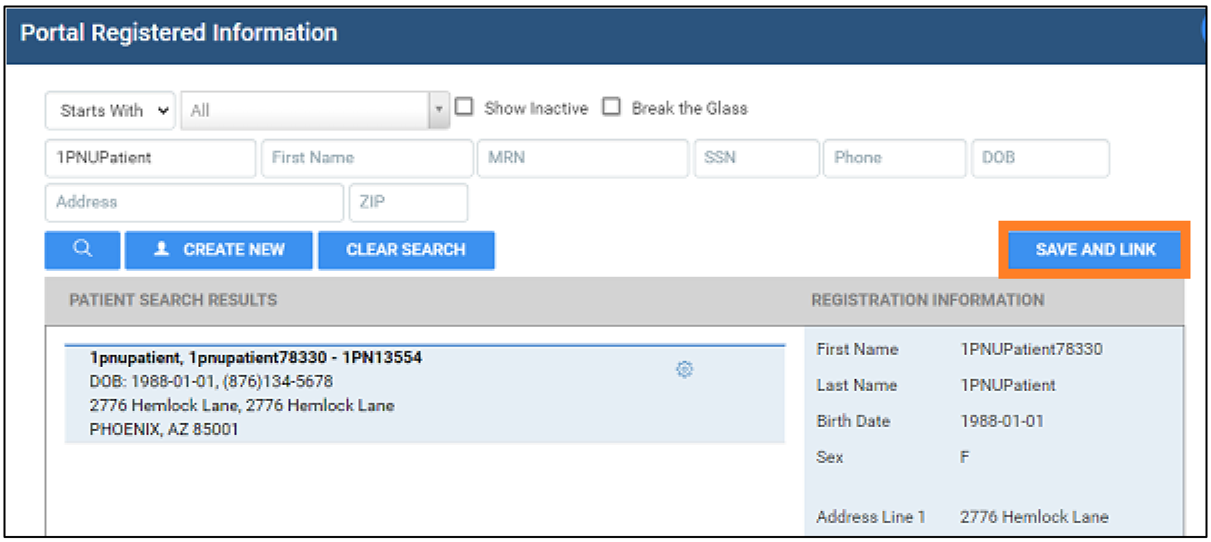
Staff: Link the new patient's information to the patient's chart

1. On the burger menu, select PORTAL REG USERS.



2. On the Portal Registered Users screen, open the user.

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.

Work with Physician Portal

For information on how physicians can use Physician Portal, see the Physician Portal user's manual. In Exa PACS/RIS, staff enable physicians to use Physician Portal by doing the following.

1. Add a resource of type Referring Provider.
2. On the LOGIN DETAILS sub-tab of the resource, select a user who:
   - Is a referring provider, and;
   - Belongs to the Portal user's group.
3. Select LINK USER.

See also:
About CDSM and AUC

About CDSM and AUC

The Protecting Access to Medicare Act (PAMA) of 2014 requires practitioners of advanced diagnostic imaging services such as CT, PET, NM, and MRI to consult a qualified *clinical decision support mechanism* (CDSM) before ordering exams for Medicare patients. CDSMs are online apps that use *appropriate use criteria* (AUC) to determine whether exams are clinically relevant (or, "appropriate"). By purchasing a license, Symmetry PACS can offer access to the LogicNets CDSM app through Physician Portal.

Appendix

The appendix includes the following sections.

Reference

User reference

This section contains the following topics.

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	-
Remove word left of the cursor	remove left	Ctrl+Alt+Back
Start recording		Ctrl+F1
Toggle recording		Ctrl+F3
Stop recording	stop recording	Ctrl+F2

Merge fields

The following table describes the merge fields available in various parts of the program. Some merge fields may not be available in your installation of Symmetry PACS depending on added modules, country, and other factors.

1. SO = Study/Order; IN = Insurance; PA = Patient; PR = Provider; ET = Email Template; NT = Notification Templates, RT = Report Templates; SF = Study Forms; CF = Custom Forms; TT = Transcription Templates

Merge Field	Formal Name	Scope1
FamilyHealthHistory	Family Health History	SO, NT, SF, CF
FollowUps	Follow Ups	SO, NT, SF, CF
GST (Canada)	General Sales Tax	SF, CF, ET

Merge Field	Formal Name	Scope1
SalesTax	Sales Tax	SF, CF, ET
Immunizations	Immunizations	SO, NT, SF, CF
LabResults	Lab Results	SO, NT, SF, CF
Medications	Medications	SO, NT, SF, CF
Referrals	Referrals	SO, NT, SF, CF
PreLabResults	Pre Lab Results	SO, NT, SF, CF
Problems	Problems	SO, NT, SF, CF
VitalSigns	Vital Signs	SO, NT, SF, CF
Age	Age	PA, ET, NT, SF, CF
AgeatDOS	Age at DOS	PA, ET, NT, SF, CF
Address1	Address 1	PA, ET, NT, SF, CF
Address2	Address 2	PA, ET, NT, SF, CF
Ciy	City	PA, ET, NT, SF, CF
State	State	PA, ET, NT, SF, CF
ZipCode	Zip Code	PA, ET, NT, SF, CF
DOB	DOB	PA, ET, NT, SF, CF
FirstName	First Name	PA, ET, NT, SF, CF
Fullname	Full Name	PA, ET, NT, SF, CF
Gender	Gender	PA, ET, NT, SF, CF
Race	Race	PA, ET, NT, SF, CF
Ethnicity	Ethnicity	PA, ET, NT, SF, CF
HomePhone	Home Phone	PA, ET, NT, SF, CF
MobilePhone	Mobile Phone	PA, ET, NT, SF, CF
WorkPhone	Work Phone	PA, ET, NT, SF, CF
Lastname	Last Name	PA, ET, NT, SF, CF
Middlename	Middle Name	PA, ET, NT, SF, CF
mrn	MRN	PA, ET, NT, SF, CF
uli	ULI	PA, ET, NT, SF, CF
ssn	SSN	PA, ET, NT, SF, CF
Suffix	Suffix	PA, ET, NT, SF, CF
Weight	Weight	PA, ET, NT, SF, CF
Height	Heigh	PA, ET, NT, SF, CF
Employer	Employer	PA, ET, NT, SF, CF
PreferredLanguage	Preferred Language	PA, ET, NT, SF, CF
Username		PA, ET, NT,

Merge Field	Formal Name	Scope1
Password		PA, ET, NT,
ApprovingPhysicianAddress1	Approving Physician Address 1	PR, ET, NT, SF, CF
ApprovingPhysicianAddress2	Approving Physician Address 2	PR, ET, NT, SF, CF
ApprovingPhysicianCity	Approving Physician City	PR, ET, NT, SF, CF
ApprovingPhysicianFirstName	Approving Physician First Name	PR, ET, NT, SF, CF
ApprovingPhysicianFullName	Approving Physician Full Name	PR, ET, NT, SF, CF
ApprovingPhysicianLastName	Approving Physician Last Name	PR, ET, NT, SF, CF
ApprovingPhysicianMiddleName	Approving Physician Middle Name	PR, ET, NT, SF, CF
ApprovingPhysicianState	Approving Physician State	PR, ET, NT, SF, CF
ApprovingPhysicianSuffix	Approving Physician Suffix	PR, ET, NT, SF, CF
CCProv1Addr1	CC Provider 1 Address 1	PR, ET, NT, SF, CF
CCProv1Addr2	CC Provider 1 Address 2	PR, ET, NT, SF, CF
CCProv1City	CC Provider 1 City	PR, ET, NT, SF, CF
CCProv1Name	CC Provider 1 Name	PR, ET, NT, SF, CF
CCProv1State	CC Provider 1 State	PR, ET, NT, SF, CF
CCProv1Zip	CC Provider 1 Zip	PR, ET, NT, SF, CF
CCProv1Alerts	CC Provider 1 Alerts	PR, ET, NT, SF, CF
CCProv2Addr1	CC Provider 2 Address 1	PR, ET, NT, SF, CF
CCProv2Addr2	CC Provider 2 Address 2	PR, ET, NT, SF, CF
CCProv2City	CC Provider 2 City	PR, ET, NT, SF, CF
CCProv2Name	CC Provider 2 Name	PR, ET, NT, SF, CF
CCProv2State	CC Provider 2 State	PR, ET, NT, SF, CF
CCProv2Zip	CC Provider 2 Zip	PR, ET, NT, SF, CF
CCProv2Alerts	CC Provider 2 Alerts	PR, ET, NT, SF, CF
CCProv3Addr1	CC Provider 3 Address 1	PR, ET, NT, SF, CF
CCProv3Addr2	CC Provider 3 Address 2	PR, ET, NT, SF, CF
CCProv3City	CC Provider 3 City	PR, ET, NT, SF, CF
CCProv3Name	CC Provider 3 Name	PR, ET, NT, SF, CF
CCProv3State	CC Provider 3 State	PR, ET, NT, SF, CF
CCProv3Zip	CC Provider 3 Zip	PR, ET, NT, SF, CF
CCProv3Alerts	CC Provider 3 Alerts	PR, ET, NT, SF, CF
CCProv4Addr1	CC Provider 4 Address 1	PR, ET, NT, SF, CF
CCProv4Addr2	CC Provider 4 Address 2	PR, ET, NT, SF, CF
CCProv4City	CC Provider 4 City	PR, ET, NT, SF, CF
CCProv4Name	CC Provider 4 Name	PR, ET, NT, SF, CF

Merge Field	Formal Name	Scope1
CCProv4State	CC Provider 4 State	PR, ET, NT, SF, CF
CCProv4Zip	CC Provider 4 Zip	PR, ET, NT, SF, CF
CCProv4Alerts	CC Provider 4 Alerts	PR, ET, NT, SF, CF
CCProv5Addr1	CC Provider 5 Address 1	PR, ET, NT, SF, CF
CCProv5Addr2	CC Provider 5 Address 2	PR, ET, NT, SF, CF
CCProv5City	CC Provider 5 City	PR, ET, NT, SF, CF
CCProv5Name	CC Provider 5 Name	PR, ET, NT, SF, CF
CCProv5State	CC Provider 5 State	PR, ET, NT, SF, CF
CCProv5Zip	CC Provider 5 Zip	PR, ET, NT, SF, CF
CCProv5Alerts	CC Provider 5 Alerts	PR, ET, NT, SF, CF
ProviderSignature	Provider Signature	PR, ET, NT, SF, CF
ReadingPhysicianAddress1	Reading Physician Address 1	PR, ET, NT, SF, CF
ReadingPhysicianAddress2	Reading Physician Address 2	PR, ET, NT, SF, CF
ReadingPhysicianCity	Reading Physician City	PR, ET, NT, SF, CF
ReadingPhysicianFirstName	Reading Physician First Name	PR, ET, NT, SF, CF
ReadingPhysicianFullName	Reading Physician Full Nae	PR, ET, NT, SF, CF
ReadingPhysicianLastName	Reading Physician Last Name	PR, ET, NT, SF, CF
ReadingPhysicianMiddleName	Reading Physician Middle Name	PR, ET, NT, SF, CF
ReadingPhysicianState	Reading Physician State	PR, ET, NT, SF, CF
ReadingPhysicianSuffix	Reading Physician Suffix	PR, ET, NT, SF, CF
Ref_PhyAddress1	Referring Physician Address 1	PR, ET, NT, SF, CF
Ref_PhyAddress2	Referring Physician Address 2	PR, ET, NT, SF, CF
Ref_PhyCity	Referring Physician City	PR, ET, NT, SF, CF
Ref_PhyFax	Referring Physician Fax	PR, ET, NT, SF, CF
Ref_PhyFirstName	Referring Physician First Name	PR, ET, NT, SF, CF
Ref_PhyFullname	Referring Physician Full Name	PR, ET, NT, SF, CF
Ref_PhyHomePhone	Referring Physisican Home Phone	PR, ET, NT, SF, CF
Ref_PhyLastName	Referring Physician Last Name	PR, ET, NT, SF, CF
Ref_PhyMiddleInitial	Referring Physician Middle Initial	PR, ET, NT, SF, CF
Ref_PhyNameOrderFMLS	Referring Physician Name Order First Middle Last Suffix	PR, ET, NT, SF, CF
Ref_PhyState	Referring Physician State	PR, ET, NT, SF, CF
Ref_PhySuffix	Referring Physician Suffix	PR, ET, NT, SF, CF
Ref_PhyZip	Referring Physician zip	PR, ET, NT, SF, CF
Ref_PhyMobileNo	Referring pHysician Mobile Number	PR, ET, NT, SF, CF
Ref_PhyOfficeNo	Referring Physician Office Number	PR, ET, NT, SF, CF

Merge Field	Formal Name	Scope1
Ref_PhyAlerts	Referring Physician Alerts	PR, ET, NT, SF, CF
Report Link	Report Link	PR, ET, NT, SF, CF
SignatureText	Signature Text	PR, ET, NT, SF, CF
PreApprovedSignatureTExt	PreApproved Signature Text	PR, ET, NT, SF, CF
preApprovedProviderSignature	PreApproved Provider Signature	PR, ET, NT, SF, CF
RadiologistFullName	Radiologist Full Name	PR, ET, NT, SF, CF
TechnologistFullName	Technologist Full Name	PR, ET, NT, SF, CF
SignatureBlockText	Signature Block Text	PR, ET, NT, SF, CF
preApprovedSignatureBlockText	PreApproved Signature Block Text	PR, ET, NT, SF, CF
AttorneyFirstName	Attorney First Name	PR, ET, NT, SF, CF
AttorneyFullName	Attorney Full Name	PR, ET, NT, SF, CF
AttorneyLastName	Attorney Last Name	PR, ET, NT, SF, CF
AttorneyMiddleName	Attorney Middle Name	PR, ET, NT, SF, CF
AttorneySuffix	Attorney Suffix	PR, ET, NT, SF, CF
AttorneyAddress1	Attorney Address 1	PR, ET, NT, SF, CF
AttorneyAddress2	Attorney Address 2	PR, ET, NT, SF, CF
AttorneyCity	Attorney City	PR, ET, NT, SF, CF
AttorneyState	Attorney State	PR, ET, NT, SF, CF
AttorneyZip	Attorney Zip	PR, ET, NT, SF, CF
AttorneyPhoneNo	Attorney Phone Number	PR, ET, NT, SF, CF
AttorneyEmail	Attorney Email	PR, ET, NT, SF, CF
AttorneyFaxNo	Attorney Fax Number	PR, ET, NT, SF, CF
AppointmentTypeCode	Appointment Type Code3	SO, RT, ET, NT, SF, CF
AppointmentTypeDescription	Appointment Type Description	SO, RT, ET, NT, SF, CF
ExpectedArrivalTime	Expected Arrival Time	SO, RT, ET, NT, SF, CF
AccessionNo	Accession Number	SO, RT, ET, NT, SF, CF
ApprovedDate	Approved Date	SO, RT, ET, NT, SF, CF
PreApprovedDate	PreApproved Date	SO, RT, ET, NT, SF, CF
TranscribedDate	Transcribed Date	SO, RT, ET, NT, SF, CF
BodyPart	Body Part	SO, RT, ET, NT, SF, CF
Department	Department	SO, RT, ET, NT, SF, CF
DictationDate	Dictation Date	SO, RT, ET, NT, SF, CF
ICDCode	ICD Code	SO, RT, ET, NT, SF, CF
ICDDescripton	ICD Description	SO, RT, ET, NT, SF, CF
StudyICDCode	Study ICD Code	SO, RT, ET, NT, SF, CF

Merge Field	Formal Name	Scope1
StudyICDDescription	Study ICD Description	SO, RT, ET, NT, SF, CF
Institution	Institution	SO, RT, ET, NT, SF, CF
Modality	Modality	SO, RT, ET, NT, SF, CF
ModalityRoom	Modality Room	SO, RT, ET, NT, SF, CF
OrderedBy	Ordered By	SO, ET, NT, SF, CF
OrderingFacility	Ordering Facility	SO, ET, NT, SF, CF
Orientation	Orientation	SO, ET, NT, SF, CF
PatientLocation	Patient Location	SO, ET, NT, SF, CF
PlaceOfService	Place of Service	SO, ET, NT, SF, CF
Priority	Priority	SO, ET, NT, SF, CF
ProcedureCode	Procedure Code	SO, ET, NT, SF, CF
ProcedureCodes	Procedure Codes	SO, ET, NT, SF, CF
ProcedureCodestabular	Procedure Codes Tabular	SO, ET, NT, SF, CF
ProcedureName	Procedure Name	SO, ET, NT, SF, CF
ProcedureNames	Procedure Names	SO, ET, NT, SF, CF
ProcedureNamesTabular	Procedure Names Tabular	SO, ET, NT, SF, CF
ReasonForStudy	Reason for Study	SO, ET, NT, SF, CF
RequestingDate	Requesting Date	SO, ET, NT, SF, CF
RoomNo	Room Number	SO, ET, NT, SF, CF
STAT	Stat description	SO, ET, NT, SF, CF
StudyDate	Study Date	SO, ET, NT, SF, CF
StudyDescription	Study Description	SO, ET, NT, SF, CF
StudyFlag	Study Flag	SO, ET, NT, SF, CF
StudyReceivedDate	Study Received Date	SO, ET, NT, SF, CF
TAT	TAT	SO, ET, NT, SF, CF
TranscribingUser	Trascribing User	SO, ET, NT, SF, CF
VehicleName	Vehicle Name	SO, ET, NT, SF, CF
studyUID	Study UID	SO, ET, NT, SF, CF
StudyFormsignature	Study Form Signature	SO, ET, NT, SF, CF
CustomFormSignature	Custom Form Signature	SO, ET, NT, SF, CF
ExamPrepInstructions	Exam Prep Instructions	SO, ET, NT, SF, CF
CPTCode	CPT Code	SO, ET, NT, SF, CF
CPTName	CPT Name	SO, ET, NT, SF, CF
visit_no	Visit Number	SO, ET, NT, SF, CF
CPTCodes	CPT Codes	SO, ET, NT, SF, CF

Merge Field	Formal Name	Scope1
CPTNames	CPT Names	SO, ET, NT, SF, CF
CPTCodesTabular	CPT Codes Tabular	SO, ET, NT, SF, CF
CPTNamesTabular	CPT Names Tabular	SO, ET, NT, SF, CF
DateofInjury	Date of Injury	SO, ET, NT, SF, CF
Allergies	Allergies	ET, NT, SF, CF
CompanyName	Company Name	ET, NT, SF, CF
CurrentDate	Current Date	ET, NT, SF, CF
CurrentTime	Current Time	ET, NT, SF, CF
DateAndTime	Date and Time	ET, NT, SF, CF
OfficeAddress1	Office Address 1	ET, NT, SF, CF
OfficeAddress2	Office Address 1	ET, NT, SF, CF
OfficeCity	Office City	ET, NT, SF, CF
FacilityLogo	Facility Logo	ET, NT, SF, CF
FacilityContactNo	Facility Contact Number	ET, NT, SF, CF
OfficeName	Office Name	ET, NT, SF, CF
OfficeState	Office State	ET, NT, SF, CF
Zip	Zip	ET, NT, SF, CF
FormalName	Formal Name	ET, NT, SF, CF
PracticeType	Practive Type	ET, NT, SF, CF
PrimaryInsurance	Primary Insurance	IN, ET, NT, SF, CF
PrimaryAddress	Primary Address	IN, ET, NT, SF, CF
PrimaryCity	Primary City	IN, ET, NT, SF, CF
PrimaryState	Primary State	IN, ET, NT, SF, CF
PrimaryZipCode	Primary Zip Code	IN, ET, NT, SF, CF
PrimaryPhone	Primary Phone	IN, ET, NT, SF, CF
PrimaryFax	Primary Fax	IN, ET, NT, SF, CF
PrimarySubscriber	Primary Subscriber	IN, ET, NT, SF, CF
PrimaryDOB	Primary DOB	IN, ET, NT, SF, CF
PrimaryRelationship	Primary relationship	IN, ET, NT, SF, CF
PrimaryPolicyNo	Primary Policy Number	IN, ET, NT, SF, CF
PrimaryGroupNo	Primary Group number	IN, ET, NT, SF, CF
HealthNumber	Health Number	IN, ET, NT, CF
VersionCode	Version Code	IN, ET, NT, CF
SecondaryInsurance	Secondary Insurance	IN, ET, NT, SF, CF
SecondaryAddress	Secondary Address	IN, ET, NT, SF, CF

Merge Field	Formal Name	Scope1
SecondaryCity	Secondary City	IN, ET, NT, SF, CF
SecondaryState	Secondary State	IN, ET, NT, SF, CF
SecondaryZipCode	Secondary Zip Code	IN, ET, NT, SF, CF
SecondaryPhone	Secondary Phone	IN, ET, NT, SF, CF
SecondaryFax	Secondary Fax	IN, ET, NT, SF, CF
Secondarysubscriber	Secondary Subscriber	IN, ET, NT, SF, CF
SecondaryDOB	Secondary DOB	IN, ET, NT, SF, CF
SecondaryRelatoinship	Secondary Relationship	IN, ET, NT, SF, CF
secondaryPolicyNo	Secondary Policy Number	IN, ET, NT, SF, CF
SecondaryGroupNo	Secondary Group Number	IN, ET, NT, SF, CF
FacilityNotes	Facility Notes	NT, SF, RT
FacilityFax	Facility Fax Number	RT, SF, CF, ET, NT
FacilityEmail	Facility Email Address	RT, SF, CF, ET, NT
Ord_PhyAddress1	Ordering Phys. Street Address1	RT, TT, SR, CF, ET, NT, CS
Ord_PhyAddress2	Ordering Phys. Street Address2	RT, TT, SR, CF, ET, NT, CS
Ord_PhyCity	Ordering Phys. City	RT, TT, SR, CF, ET, NT, CS
Ord_PhyFirstName	Ordering Phys. First Name	RT, TT, SR, CF, ET, NT, CS
Ord_PhyFullName	Ordering Phys. Full Name	RT, TT, SR, CF, ET, NT, CS
Ord_PhyLastName	Ordering Phys. Last Name	RT, TT, SR, CF, ET, NT, CS
Ord_PhyMiddleName	Ordering Phys. Middle Name	RT, TT, SR, CF, ET, NT, CS
Ord_PhyState	Ordering Phys. State	RT, TT, SR, CF, ET, NT, CS
Ord_PhySuffix	Ordering Phys. Suffix	RT, TT, SR, CF, ET, NT, CS
Ord_PhyZip	Ordering Phys. Postal Code	RT, TT, SR, CF, ET, NT, CS
Non-ProprietaryName	Non-Proprietary Name	RT, TT, SF, CF
AmountUsed	Amount Used	RT, TT, SF, CF
Route	Route	RT, TT, SF, CF
Supv_PhyAddress1	Supervising phys. Street Adrs. 1	RT, TT, SF, CF, ET, NT, CS
Supv_PhyAddress2	Supervising phys. Street Adrs. 2	RT, TT, SF, CF, ET, NT, CS
Supv_PhyCity	Supervising phys. City	RT, TT, SF, CF, ET, NT, CS
Supv_PhyFirstName	Supervising phys. First Name	RT, TT, SF, CF, ET, NT, CS
Supv_PhyFullName	Supervising phys. Full Name	RT, TT, SF, CF, ET, NT, CS
Supv_PhyLastName	Supervising phys. Last Name	RT, TT, SF, CF, ET, NT, CS
Supv_PhyMiddleName	Supervising phys. Middle Name	RT, TT, SF, CF, ET, NT, CS
Supv_PhyState	Supervising phys. State	RT, TT, SF, CF, ET, NT, CS
Supv_PhySuffix	Supervising phys. Suffix	RT, TT, SF, CF, ET, NT, CS

Merge Field	Formal Name	Scope1
Supv_PhyZip	Supervising phys. ZIP	RT, TT, SF, CF, ET, NT, CS
Canada only:	Health Card Number	RT, SF, CF, ET, NT

User rights

The following table describes the rights that administrator can assign to a user role. All of these rights may not be available depending on your product and configuration.

Note: Shaded rows indicate that the right is not currently in use.

Category	Right	Description
Billing/ Setup	Billing Codes	Allows creating and editing billing codes
	Billing Class	Allows creating and editing billing classes
	Claim Status	Allows creating and editing claim statuses
	CAS Group Code	Allows creating and editing CAS group codes
	Provider ID Code Qualifier	Allows mapping provider ID code qualifiers to billing providers
	Payment Reason	Allows editing payment reasons such as co-pay, deductible, and payment plan
	CAS Reason Code	Allows creating and editing CAS reason codes
	Status Color Code	Allows adding and editing colors for payment, claim, and billed statuses
	Supporting Text Templates	Allows mapping of preconfigured supporting text to specific service codes.
	Insurance EDI Mapping	Allows insurance mapping, such as billing method and clearinghouse
	Adjustment Codes	Allows adding and editing adjustment codes
	Billing Provider	Allows adding and editing billing providers
	Billing Messages	Allows editing billing messages that print on statements
	Billing Validation	Allows selecting the data that are validated during claim validation
	Printer Templates	Allows editing some settings in printer templates such as page margins
	EDI Request Templates	Allows creating and editing EDI request templates.
	Clearing House	Allows entering clearinghouse information
	Autobilling	Allows creating auto-billing profiles for automatic generation of claims
	CollectionsProcess	Allows configuring the automatic claim collections process
	Delay Reasons	Allows adding, editing, and deleting reasons for delayed payment
Billing	Claims	Allows working with claims
	Edit Claim	Allows opening the edit claim screen
	Claim Inquiry	Allows access to patient claim information
	All Insurances	All insurances
	Coordination of Benefits	Allows coordinating benefits

Category	Right	Description
	Explanation of Benefits	Allows access to billing ERA
	ERA Inbox	Allows opening the ERA inbox
	EOB Claims Process	Allows opening the EOB tab, and uploading and processing electronic payment files
	File Insurance	Allows managing billing claims
	Patient Claim	Allows viewing a patient's claim history within Billing, and makes available the Inquiry buttons on the Patient Information tab in the patient chart and Edit Study screen
	Patient Report	Allows opening patient reports and documents within Billing
	Payments	Allows viewing and processing payments
	Apply Payments	Allows applying payments to claims
	Refund	Allows processing refunds
	Back to Ready to Validate	Allows changing claim status to Ready to Validate
	Claim Validate	Allows validating claims
	Create/Split Claim	Allows splitting a claim with more than one charge
	Delete Payment	Allows deleting payment records
	Delete Claim	Allows deleting claims
	File Management	Allows opening the file management screen in Canadian versions
	Edit Claim Status	Allows manually changing claim statuses
	Invoice Activity Statement	Allows viewing and printing the activity statement
	Query Claim	Allows querying of claims.
	Adjust to Paid in Full	Adds a shortcut menu command to pay a claim in full.
	Census	Allows viewing the Census screen.
Billing/ Report		All rights in this category allow creating the corresponding report.
	Aged AR Summary	
	Aged AR Detail	
	Charges	
	Claim Activity	
	Claim Transaction	
	Collections	
	Credit Balance Encounters	
	Diagnosis Count	
	Modality Summary	
	Monthly Recap	
	Patient Statement	
	Payer Mix	
	Payment	

Category	Right	Description
	Claim Inquiry	
	Patients By Insurance	
	Payments by Insurance Company	
	Procedure Analysis by Insurance	
	Procedure Count	
	Reading Provider Fees	
	Referring Provider Count	
	Referring Provider Summary	
	Transaction Summary	
	Patient Activity Statement	
	Payments Realization Rate Analysis	
	Send claims to collections	Allows using automatic collections to change claim statuses to “Claim in Collection,” and make other changes.
Billing/Log	Billing User Log	Allows viewing the billing user log
	Bulling Audit Log	Allows viewing the billing audit log
Chat	Personal Chat Allowed	Allows using Exa Chat to send and receive messages with individual users (private chat)
	Group Chats Management	Allows creating and managing group chat rooms
Dashboard	Dashboard	Allows opening the dashboard
Dictation	Approve	Allows approving a dictated study report
	Approve (Addendum)	Allows approving an addendum (Edit or Addition) on a dictated study report, and changing a study's status from Approved to Approved-Coded.
	Dictation	Allows creating a dictated addendum (Edit or Addition) on an approved study report
	Dictation (Addendum)	Allows creating a dictated report
	Dictation (Delete)	Allows deleting a dictated report
	Submit For Review	Allows submitting an addendum for review on a dictated report
	Submit For Review (Addendum)	Allows submitting a dictated report for review
	Transcription (Addendum)	Allows creating an addendum by using Web Trans
	Link Reports	Allows linking reports (and studies)
	Unlink Reports	Allows unlinking reports (and studies)
Dispatching Dashboard	Dispatching Dashboard	Allows users of Mobile RAD to open the dispatching dashboard
General	AE Scripts	Allows managing AE scripts to receive, send, or print studies
	API Users	Allows adding and editing API users and rights
	Application Entities	Allows configuring application entities (AE).
	Assign Study to Users	Allows assigning studies to specific users from the worklist

Category	Right	Description
	Company	Allows editing general settings including those related to: company contact and billing, apps, MRN, AE filters, LDAP, Rcopia, and HL7
	File Stores	Allows selecting folders to store various data (mainly images) on the server
	Notification	Allows adding notifications that appear on the dashboard
	Tasks	Allows entering tasks that appear on the My Tasks gadget of the dashboard
HL7	HL7 Global Config	Allows viewing global HL7 configurations
	HL7 Queue	Allows viewing the HL7 Outbound (Sender) log
	HL7 Receiver Log	Allows viewing the HL7 Inbound (Receiver) log
Home	Allow Reset Approved studies	Allows resetting approved studies to Scheduled status
	Allow Reset of Canceled and No Show Studies	Allows resetting studies from Canceled or No Show status to Scheduled status
	Appointment Confirmation	Allows viewing the Appointment Confirmation screen
	Can Edit Public Filter	Allows editing public filters
	Can Edit Public Template	Allows editing public templates
	Cancel Reasons	Allows canceling appointments
	CD Burn	Allows burning DICOM images to a CD or external device
	DICOM View	Allows switching between DICOM preview or priors on the worklist
	DICOM Viewer	Allows opening images on the Symmetry PACS viewer
	External App Icon	Allows opening third party applications from the worklist
	Image Preview	Allows previewing images on the worklist
	Import Images	Allows importing images by using the PACS Actions menu
	Import Images from Portal	Allows importing images from the provider or attorney portal into Symmetry PACS
	Link DICOM Study	Allows linking a DICOM study to another study
	Marketing Rep Dashboard	Allows opening the Marketing Representative dashboard
	Merge Study	Allows merging and splitting DICOM studies and RIS orders
	Technologist	Allows associating a technologist to an order
	Opal Viewer	Allows viewing studies with the Symmetry PACS viewer
	Order additional	Allows opening the Additional Information tab within the Edit Study screen
	Order ICD	Allows adding ICD codes to an order
	Order Referring Provider	Allows opening the Referring Provider tab within the Edit Study screen
	Order Studies	Allows opening the Exam Information tab within the Edit Study screen
	QC Delete	Allows deleting DICOM studies within the QC tab
	QC Edit	Allows editing some information in a DICOM study within the QC tab
	QC Move to Studies	Allows manually moving a DICOM study from the QC tab to the All Studies tab
	QC Reconciliation	Allows manually matching or reconciling a DICOM study to a RIS order

Category	Right	Description
	Worklist Menu	Allows opening the worklist shortcut menu
	Send Fax	Allows sending approved reports and study forms by fax
	Send Studies	Allows sending a DICOM study to another AE from the worklist
	Show Priors	Allows viewing a patients' priors in a separate study filter on the worklist
	Studies	Allows accessing Symmetry PACS
	Study Delete	Allows deleting studies from a patient chart, and to delete selected images from series.
	Study Purge	Allows permanently deleting a study
	Study Edit	Allows opening the Edit Study screen
	Study Forms	Allows opening the Study Forms tab within the Edit Study screen
	Change Status	Allows changing the status of a study
Log	API Log	Allows viewing the API log, which tracks API activity
	Audit Log	Allows viewing the Audit log, which tracks system-wide activity
	Rcopia Log	Allows viewing the Rcopia log, which shows Rcopia activity
	Eligibility Log	Allows viewing the Eligibility log
	User Log	Allows viewing the User log, which tracks system-wide user activity
Patient	Activity Log	Allows viewing the Activity log within the patient chart and Edit Study screen
	Advanced Search	Allows expanded searching of patients by age, allergies, lab results, problems, sex, medications, vital signs, smoking status, and race/ethnicity
	Allergies	Allows viewing the Allergies tab in the Edit Study screen, and editing patient allergies
	Allergies (Read only)	Allows viewing the Allergies tab in the Edit Study screen (only).
	Break the Glass	Allows use of the Break the Glass function to access confidential records.
	Eligibility	Allows using third-party services to request confirmation of insurance eligibility
	Eligibility (Read only)	Allows viewing eligibility requests/results if previously requested
	Clinical Summary Transmit	Allows creating, viewing, and transmitting the Clinical Visit Summary/CCD file
	Export CCD	Allows encrypting and downloading of patient charts for physician referrals
	Family Health History	Allows completing the Family Health History form for a patient's first-degree relatives
	Film Tracking	Allows check-out and tracking for 'hard' films from the library
	Immunization	Allows adding and editing patient immunization records
	Immunization (Read Only)	Allows viewing patient immunization records
	Lab Orders	Allows adding, submitting, editing, and deleting laboratory tests and results records
	Lab Orders (Read Only)	Allows viewing laboratory tests and results records

Category	Right	Description
	Medications	Allows adding, editing, and deleting prescribed medications, supplements, and OTC products through Rcopia
	Medications (Read Only)	Allows viewing prescribed medications, supplements, and OTC products through Rcopia
	Merge Patients	Allows merging of patient charts
	Outside Referrals	Allows importing CCD/CCR files into the patient chart from the referring provider
	Patient Alerts	Allows selecting alerts or adding custom alerts and notes to a patient chart
	Patient Arrival Worklist	Allows viewing the patient arrival worklist when patients use the kiosk to check in
	Patient Clinical Rules	Allows creating clinical support rules
	Patient Documents	Allows uploading and scanning documents to a study or patient
	Patient Encounter	Allows viewing fees associated with CPT codes and associated fees or charges
	Patient Guarantor	Allows adding a guarantor to a patient's insurance
	Patient Information	Allows opening the Patient Information tab in the patient chart and Edit Study screen
	Patient Insurance	Allows opening the Insurance tab in the patient chart and Edit Study screen
	Patient Prescriptions	Allows submitting prescriptions to a pharmacy, formulary checking, and adding, editing, and deleting prescribed medications through Rcopia
	Patient Prescriptions (Read Only)	Allows viewing of prescribed medications through Rcopia
	Patient Search	Allows searching for patients from the Patient tab in the patient chart
	Patient Studies	Allows opening the Studies tab within the patient chart and Edit Study screen
	Patient Orders	Allows viewing the Orders tab within the patient chart
	Payment History	Allows opening the Payment History tab in the patient chart
	Pending Follow-ups	Allows viewing follow-up appointments
	Pending Referrals	Allows viewing referrals
	Problems	Allows editing in the Problems tab in the Edit Study screen (to add and edit diagnosis codes)
	Problems (Read Only)	Allows viewing the Problems tab in the Edit Study screen
	To Be Reviewed	Allows opening the To Be Reviewed tab in the patient chart.
	Transition of Care	Allows exporting a CCD file and sending it to a referring physician via email
	Vital Sign (read Only)	Allows viewing a patient's vital signs on the Edit Study screen
	Vital Signs	Allows adding and editing a patient's vital signs on the Edit Study screen
	Patient Claim Inquiry	Allows viewing patient claim information
	Patient Claim Inquiry (Read Only)	Allows viewing patient claim information
	VIP	Allows designating patients as VIPs
Peer Review	Peer Review Allowance	Allows managing automatic peer review assignments

Category	Right	Description
	Peer Review Manual Appointment	Allows manually assigning peer reviews from the worklist
	Peer Review Operational	Allows generating the peer review operational report
Portal Reg Users	Portal Reg Users	Allows managing registered users of portals, such as Patient Portal
Reports		All rights in this category allow creating the corresponding report
	Study Details	
	Cancellation Reason	
	My Reports	
	Completed Schedules	
	Date of Service Payment Summary	
	Export Completed Studies	
	Export Peer Review	[unused]
	Insurance Balance Aging	
	Marketing Rep Activities	
	Monthly/Daily Study Goals	
	Patients Worksheet	
	Referrals Variance	
	Referring Physician Study Count	
	Report Filter	
	Report Provider	
	Relative Value Units	
	Scheduler Activity	
	Studies Breakdown	
	Studies by Modality	
	Studies by Modality Room	
	Modality Breakdown	
	Transcription Study Count	
	Turnaround Time (TAT) – Calculated	
	Fees by Facility and Modality	
	Fees by Radiologist and Modality	
	Unfinished Studies	
	Unsigned Orders	
	STAT Tracking	
	Insurance vs LOP	
	Marketing Report Export	
	Technologist Productivity	

Category	Right	Description
	Audit Trail	
Schedule	Add Study	Allows creating new studies, such as in the Edit Study screen.
	Allow Double Booking	Allows double-booking an appointment if available for the facility
	Allow to edit Accession	Allows editing study accession numbers
	Approved Report	Allows viewing approved radiology reports
	Assign Vehicle	Allows assigning a vehicle to a study for Mobile RAD
	Available Slots	Allows using the Find/Available Slots screens
	Billing	Allows viewing information from the Edit Study screen
	Charge and Payments	Allows opening the Charges and Payments tab within the Edit Study screen
	TOS Payments	Allows opening the Payments area of the program
	Patient Payment History	Allows viewing patient payment history and printing payment receipts
	Chief Complaints	Allows adding and editing chief complaints in the patient chart
	Chief Complaints (Read Only)	Allows viewing chief complaints in the patient chart
	Clinical Overview	Allows opening the patients clinical overview
	DICOM Edit	Allows editing DICOM information within the QC and Exam Information tabs within the Edit Study screen
	Education Material	Allows opening the Educational Material tab in the Edit Study screen
	Follow Ups	Allows scheduling follow-up appointments in the Follow Up tab in the Edit Study screen
	Follow Ups (Read Only)	Allows viewing follow-up appointments on the Follow Up tab in the Edit Study screen
	Insurance Authorization	Allows adding and editing insurance authorizations for studies
	Medical History	Allows adding, editing, and updating patient medical histories
	Medical History (Read Only)	Allows viewing patient medical histories
	New Order	Allows creating new orders
	Notes	Allows entering study notes, patient notes, schedule notes, reasons for studies, and call log entries
	Notes (Read Only)	Allows viewing study notes, patient notes, schedule notes, reasons for studies, and call log entries
	Order Forms	Allows adding custom forms to orders from the Custom Forms tab in the Edit Study screen
	Order Forms (Read Only)	Allows viewing custom forms added to a study from the Custom Forms tab in the Edit Study screen
	Order Images	Allows ordering images or reports from the Studies tab in the patient chart
	Order Summary	Allow opening the Summary tab in the Edit Study screen
	Ordering Physician Search	Allows using the magnifying glass to search the Provider Setup screen and NPPES website for an ordering physician to add to an order
	Quick Block	Allows creating a quick block (schedule block) from the schedule book

Category	Right	Description
	Patient Demographics	Allows editing information in the Patient Information tab in the patient chart and Edit Study screen
	Priority	Allows assigning priority to the study from the worklist and in the Additional Information tab within the Edit Study screen
	Recent Schedules	Allows scheduling/copying appointments in the Recent Schedules screen if available for the facility
	Recent Schedules (Read Only)	Allows viewing appointments in the Recent Schedules screen if available for the facility
	Reference Document	Allows assigning a reference document to an order and providing it to the patient
	Referrals	Allows entering information for referrals to another provider
	Schedule Book	Allows viewing the schedule book
	Schedule in Non-working Time Slot	Allows scheduling appointments in non-working timeslots from the schedule book
	Stat	Allows setting STAT levels for a study or order from the worklist
	Status Validation	Allows validating a study in the Validation screen when validation rules are set within the Study Status workflow
	Study CPT Update	Allows updating the CPT of a study
	Study Education Material	Allows opening the Educational Material tab in the Edit Study screen
	Teaching Study	Allows creating a DICOM teaching study from the worklist and within the viewer
	Transcription	Allows editing report transcriptions
	ExaTrans2 Multipanel	Allows using Exa Trans2 in the multipanel, and using the multipanel without Exa Trans2.
	Vehicle Assignments	Allows viewing the list of scheduled/dispatched vehicles in using Mobile RAD
	Edit Requesting Date	Allows editing of the initially requested date for an exam
Setup	Appointment Types	Allows adding, editing, and deleting appointment types
	Body Parts	Allows adding, editing, and deleting body parts
	Cognitive Status	Allows adding, editing, and deleting cognitive statuses
	CPT	Allows adding, editing, and deleting CPT codes
	Custom Forms	Allows adding, editing, and deleting custom forms, and attaching them to studies
	DB Totals	Allows using the DB Totals function
	DICOM Receiver Rule	Allows creating and managing DICOM receiver rules
	DM List	Allows viewing the DM Manager and list of DMs
	DM New	Allows creating a new view in the DM Manager
	EDI Translations	Allows creating and managing EDI translations
	Editor Template	Allows creating, editing, and deleting Editor templates
	EDI Rule	Allows creating and managing EDI rules

Category	Right	Description
	Email Template	Allows creating and assigning email templates for the Confirmation screen
	Notification Templates	Allows creating and assigning templates sent to referring physicians
	Cover Sheets	Allows creating and assigning cover sheets for approved reports
	Exam Authorization	Allows opening the Exam Authorization tab
	Exam Authorization Override	Allows scheduling that breaks authorization rules
	Export Summary	Allows exporting summary totals
	Facility	Allows adding, editing, and deactivating facilities
	Market	Allows configuring regional markets
	Fee Schedule	Allows creating and editing billing fee schedules and contracts
	Facility Fee Schedule	Allows creating a fee schedule based on facility and modality for the Fees by Facility and Modality report
	Provider Pay Schedule	Allows creating a pay schedule for radiologists, which is used in the Fees by Radiologist and Modality report
	Provider Location Information	Allows managing provider location information
	Form Builder	Allows creating and editing electronic study forms, and managing their attachment
	Functional Status	Allows adding, editing, and deleting functional statuses
	Gadgets	Allows adding, arranging, and viewing gadgets within the user's dashboard
	Hanging Protocol Groups	Allows editing DM (hanging protocol) settings for user groups, modalities, and other categories
	SR Report Queue	Allows opening the Structured Report Queue tab, which shows the status of outbound DICOM SRs
	Issuers	Allows adding and editing issuers of patient IDs
	ICD	Allows adding, reloading, and importing ICD, SNOWMED, and LOINC code files
	Insurance Provider	Allows adding, editing, and deleting insurance providers and assigning them to a facility
	Matching Rules	Allows creating rules for matching DICOM studies
	Macro Notes	Allows configuring macro notes
	Modality	Allows adding, editing, and reordering modality priority
	Modality Room	Allows adding and editing modality rooms
	Monthly Goals	Allows creating and editing monthly study count goals by modality for the Monthly Goals operational report
	No Shows	Allows setting an appointment to a no-show status from the worklist and schedule book
	Ordering Facility	Allows adding and editing ordering facilities
	Patient Portal Log	Allows viewing Patient Portal activity
	POS Map	Allows creating and editing place of service mappings for POS codes, addresses, and mobile dispatching addresses

Category	Right	Description
	Billing Rules	Allows adding, editing, and deleting billing rules for ordering facilities.
	Provider	Allows adding, editing, and importing resources such as referring providers, reading providers, and technologists
	Provider Group	Allows adding and editing groups of providers
	Provider Organizations	Allows adding and editing provider organizations
	Queue	Allows viewing the status of outbound DICOM studies
	Rcopia Transactions	Allows viewing Rcopia transactions
	Report Template	Allows user to create and edit report headers for approved reports within the Report Template tab
	Report Queue	Allows resending and viewing the status of outbound emails and faxes such as approved reports, notifications, scanned documents, and study forms
	SR Report Queue	Allows opening the Structured Report Queue tab, which shows the status of outbound DICOM SRs
	Transcription Template	Allows adding, editing, deleting, and associating templates with facilities, modalities, and study descriptions used for transcription
	Routing Rules	Allows creating routing rules for DICOM studies to send, print, or perform an HL7 action
	Schedule Block	Allows adding and editing schedule blocks that display on the schedule book and Find Slots screens
	Schedule Filter	Allows adding and editing filters of the schedule book
	Schedule Rules	Allows adding and editing individual rules within a schedule template
	Allow Editing of Display Block Colors	Allows editing the color of blocks on the schedule book
	Schedule Templates	Allows adding and editing scheduling templates
	Study Filter	Allows adding, editing, and deleting worklist study filters
	Update Global Study Filters	Allows updating global and shared worklist filters
	Study Flag	Allows adding and editing study flags
	Study Status	Allows adding study statuses and associating them with study flows
	Study Status - Read Only	Allows opening the Study Status tab to view study statuses and flows
	Templates	Allows adding and editing structured reporting templates
	Auto Suggestions	Allows adding and editing auto suggestions for structured reporting
	Keywords	Allows adding and editing keywords used for structured reporting
	Image Hotspots	Allows navigating through a cardiac US cine series
	SR Mapping	Allows adding and editing mappings of DICOM properties to structured reports
	Update URLs	Allows adding and updating Rcopia URLs
	Users Online	Allows viewing which users are currently logged on, and terminating connections
	Vaccines	Allows adding, editing, and marking the inactive vaccines list
	Vehicle Log	Allows opening the Vehicle Log tab in Log Setup

Category	Right	Description
	Vehicle Registration	Allows adding and managing available vehicles to dispatch in Mobile RAD
	Vehicle Tracking	Allows viewing the location of a vehicle
	Locked Slots	Allows locking and unlocking slots (scheduling time ranges) for scheduling
	Insurance Provider Payer Type	Allows creating and editing payer type groups or categories that can be associated to insurance companies
	Provider Level Codes	Allows creating and editing provider level codes and percentages to associate with CPT codes, which are used in the Reading Provider Fees report
	Portal Configurations (Read Only)	Allows viewing portal configuration settings.
	Portal Configurations	Allows configuring links to appear on the patient, provider, and attorney portals.
	NDC Codes	Allows configuring NDCs.
User Mgmt.	AD Groups	Allows adding, editing, or deleting AD groups.
	AD Users	Allows adding, editing, or deleting AD users.
	User	Allows managing individual user access to the system
	User Assigned Patients	Allows viewing the list of patients who are currently assigned to specific users
	User Assigned Studies	Allows viewing the list of studies that are currently assigned to specific users
	User Group	Allows creating, managing, and assigning document types and user roles to user groups
	User Role	Allows creating and managing rights
	Copy Profile Settings	Allows copying profile settings from one user to another
	External Apps	Allows configuring Symmetry PACS to work with external applications
Viewer Options	Cardiogram Settings	Allows configuring cardiogram settings in Viewer Settings
	External Tools	Allows configuring options in the External Tools tab in Viewer Settings
	General Information	Allows configuring options in the General tab of Viewer Settings
	Interface Settings	Allows configuring options in the Interface tab of Viewer Settings
	Mammography Options	Allows configuring options in the Mammography tab of Viewer Settings
	Modality Options	Allows configuring options in the Interface tab of Viewer Settings
	Overlay Settings	Allows configuring options in the Overlays tab of Viewer Settings
	Tools Settings	Allows configure options in the Tools tab of Viewer Settings

Description of reports

The following table lists all of the reports available on the Exa platform. Some reports may not be available to you depending on your product and configuration.

Category	Report	Description
Billing/Reports	Aged AR Detail	AR aging by facility, responsible party, and payer by cutoff date and selected facilities, in detail
	Aged AR Summary	AR aging by facility, responsible party, and payer by cutoff date and selected facilities
	Charges	Charges for reconciling and reviewing the charges populated for any date of service
	Claim Activity	Detailed claim activity history by claim date range
	Claim Inquiry	All submitted claims, and order payments and balances
	Claim Transaction	All claims, and claim payments and balances
	Collections	Claims in the Collections Review status
	Credit Balance Encounters	Credit balance encounters
	Diagnosis Count	Aggregate diagnosis count by ICD code and facility, by order date range
	Modality Summary	Modality summary
	Monthly Recap	Monthly recap
	Patient Statement	Patient statement
	Patients by Insurance	Patients seen within a date range by insurance
	Payer Mix	Payer mix
	Payments	Totals by payment and payer type, and how each charge line item is applied by accounting date range
	Payments by Insurance Company	Calculated payments to each insurance company, by patient
	Payments Realization Rate Analysis	Accounts with a zero balance
	Procedure Analysis by Insurance	Procedures by insurance
	Procedure Count	Number of procedures approved by radiologist fee schedule
	Reading Provider Fees	Reading provider fees
	Referring Provider Count	Referring provider count
	Referring Provider Summary	Referring doctor summary information
	Transaction Summary	Transaction summary
Reports - Schedule & Reports	Daily Schedules	Information on studies performed by day
	Export Completed Studies	CSV export of patient, study, and insurance details for completed or approved studies
	Marketing Rep Activities	Notes and activities that marketing representatives enter about referring physicians
	Unsigned Orders	not signed by referring physician. No longer used.

Category	Report	Description
Operations	Cancellation Reason	Statistics on canceled studies with cancellation reason as a key filtering criterion.
	Scheduler Activity	Number of orders (based on the current order status) by time of day that a user ordered, scheduled, rescheduled, or canceled, by facility and date range
	Unfinished Studies	not having selected study statuses, by facility and date range
	Referrals Variance	Number of studies referred by referring physicians in the past 13 months, by facility, modality, and month
	Studies Breakdown	Number of studies by facility, modality, study date, and study status
	Studies by Modality	Aggregate study count by facility, modality, study date, and study status
	Studies by Modality Room	Aggregate study count by facility and modality room
	Modality Breakdown	Number of studies performed based on CPT or appointment type, by modality
	Technologist Productivity	Number of studies performed per technologist by facility, modality, appointment type, and procedure code
	Peer Review Operational	Progress and results of peer reviews performed
	Fees by Radiologist and Modality	Summary and breakdown of fees for a modality, by radiologist
	Turnaround Time (TAT) - Calculated	Shows turnaround time (TAT) calculated based on selected date, type, and study's approved date, by date range, facilities, and/or ordering facilities
	Relative Value Units	CPT and RVU totals for reports signed off, by date range
	Referring Physician Study Count	Number of studies referred by referring physicians by date range
	Completed Schedules	Shows information about completed studies
	Monthly/Daily Study Goals	Number of studies performed in the month compared to the goal set in Monthly Goals Setup
	STAT Tracking	Number of studies marked as STAT. Includes approved studies that had a STAT level at any time in the past.
	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

Measurement accuracy limits

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

Viewer tools and keyboard shortcuts

The following table lists all tools that are available in the viewer toolbar and shortcut (context) menu, and that are available as keyboard shortcuts. See corresponding topics for the functions of the tools.

Bold = Tool appears by default, cannot be removed.

TB = Toolbar (main, top, bottom, left), CM = Shortcut (context) menu, KS = Keyboard shortcut, ETS = Exa Trans shortcut

Tool	Name	Availability	Function
	3D Ray	TB, CM, KS	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	TB, CM, KS	Displays a cursor in other open planes that follows the motion of the cursor in the active plane.
	3D Angle	TB, CM	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	TB, CM	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	TB, CM	Click to add the point. The point appears at the same coordinates on all series with the same frame of reference.
	3D ROI	TB, CM	Available in a future release.
	AR	TB, CM, KS	Plots points to represent angular rotation.
	Actual Image Size	TB, CM, KS	Displays images in their real-life anatomical dimensions.
	Add to DICOM Print Queue - Image	CM, KS	Adds the current image to the DICOM print queue for later printing.
	Add to DICOM Print Queue - Series	CM, KS	Adds the current series to the DICOM print queue for later printing.
	Angle Marker	TB, CM, KS	Measures and annotates an angle.
	Annotate Series	TB, CM, KS	Select this tool, then select an annotation tool and annotate the current image to add the same annotation to all images in the series. Does not support 3D annotations.

Tool	Name	Availability	Function
	Annotate Tagged Images	TB, CM, KS	Select, and then apply a 2D annotation to a tagged image to annotate all tagged images.
	Approve	ETS	Approves the current study.
	Approve and Next	ETS	Approves the current study and opens the next study.
	Arrow	TB, CM, KS	Draws an arrow.
	Audio Annotation	CM	[Discontinued]
	Auto W/L	TB, CM, KS	Automatically optimizes the W/L.
	Bone Enhance	TB, CM	Controls contrast between bone and other tissues.
	CAD	TB, KS	Displays CAD findings, with a button menu for selecting specific findings. Available when CAD findings are present in the opened study. The following can be set independently. - BTO Jump to Next Finding - Toggle Breast Density - Toggle Breast Geometry - Toggle Calcification Clusters - Toggle Individual Calcification - Toggle Malc - Toggle Nipple - Toggle All Study - Toggle Current Image
	Center Point	TB, CM	Click two points. The center point between them is indicated.
	Change Slice Thickness	TB	Sets the slice thickness.
	Change Annotation Color	CM	Right-click an annotation, select Change Annotation Color, and then select a color in the sub-menu. Prerequisite: Configure two or more annotation colors in viewer settings.
	CLAHE	TB, KS	Contrast limited adaptive histogram equalization. Turns CLAHE mode on/off. Improves image contrast.
	Close Series	KS	Keyboard shortcut for the Close Series option in the image cell's upper-right shortcut menu.
	Close Study	KS	Keyboard shortcut for Partial Close.
	Cobb Angle	TB, CM, KS	Measures a Cobb angle.
	Context Menu	TB	Displays the viewer shortcut.

Tool	Name	Availability	Function
	Context Tool	TB, CM, KS	Displays a linked image at the same X, Y, Z angle as the current image.
	Contrast Enhance	CM	Applies a fixed image contrast adjustment.
UNQ	Create Teaching Study	TB, CM	Creates a teaching (unq.) study.
	CT Ratio	TB, CM, KS	Displays the angle between two lines. Use to calculate the angle between vertebra.
	Curve	TB, KS	Click two points to estimate curvature from the center of the end vertebrae to the center of the apical vertebrae.
	Cutlines	TB, CM, KS	Shows/hides cutlines, if present.
	Default	TB, KS	Selects the standard pointer tool.
	Delete Annotation	CM	Right-click an annotation and select Delete Annotation to delete.
	Delete Same Type Annotation	CM	Deletes all annotations of the same type (such as text annotations) on the current image only.
	Delete All Image Annotations	TB, CM, KS	Deletes all annotations.
	Delete Series Annotations	TB, CM, KS	Deletes all annotations in the current series.
	Delete All Study Annotations	TB, CM, KS	Deletes all annotations in the current study.
	Delete Series	CM	Available with Study Delete rights. Select to delete the current series.
	Delete Image	CM	Available with Study Delete rights. Select to delete a single image from a series.
DP	DICOM Print	TB, CM	Sends the image to a DICOM printer.
	DICOM Values or View DICOM Values	TB, CM, KS	Displays a list of DICOM values associated with the current image.
DM	DM Settings	TB, CM	Opens display management settings.
	DM	KS	DM navigation functions: DM Next DM Next Current

Tool	Name	Availability	Function
			DM Next Group DM Next Prior DM Previous DM Previous Prior
	Dot	TB, CM, KS	Draws a dot.
	Download Image	CM, KS	Downloads the current image to the default download folder on the workstation.
	Download Series	CM	Downloads the current series to the default download folder on the workstation
	Download Series as MP4	CM	Downloads the current series as an MP4 video, saved in a selectable frame rate.
	Edit Annotations	TB, CM, KS	Turns Edit mode on/off. Edit mode allows editing of previously set annotations.
	Ellipse	TB, CM, KS	Draws an ellipse.
	Enable Cine	CM, KS	Select to turn on scrolling of series images with the mouse wheel.
	External Tools	TB, CM	Reserved for opening an external application.
	Fit to Window	TB, CM, KS	Restores original zoom level.
	Flip	TB, CM, KS	Flips the image across its horizontal or vertical axis (hover over the tool to select between axes).
	Frames	TB	Selects the number and arrangement of frames to display in the viewing area.
	FH Measure	TB, CM	Takes freehand measurements.
	Freehand ROI	TB, CM, KS	Freehand-draws an ROI.
	Histogram	TB, CM	Displays a histogram.
	HO Angle or Horizontal Orthogonal Angle	TB, CM, KS	Draws a horizontal orthogonal angle.
	Horizontal Line	TB, CM, KS	Draws a horizontal line.
	HU or Hounsfield Units	TB, CM, KS	Displays the pixel value in Hounsfield Units.
	Invert	TB, CM, KS	Inverts black/white values.

Tool	Name	Availability	Function
	L Marker	TB, CM, KS	Adds an L (left) marker.
	Line	TB, CM, KS	Draws a straight line.
	Linking	KS	After linking two series, the Linking keyboard shortcut turns linking ON and OFF
	Link Auto	TB, KS	Links two or more series that are open.
	Link Manual	TB, KS	Links user-specified frames between panels.
	Mask Image	TB	[Discontinued]
	M Compare or Measure Compare	TB, CM, KS	Measurement comparison. Click a first and second point, then double-click a third point. Displays the distances between the points.
	Magnify	TB, CM, KS	The "magnifying glass tool," displays a movable zoomed area.
	Measure	TB, CM, KS	Measures between two specified points.
	MPR	TB, KS	Multiplanar reformation. Select to generate and display coronal, sagittal, and MIP (maximum intensity projection) stacks from an axial image.
	Next Series	KS	Keyboard shortcut for moving to the next available series in the study.
	One to One	TB, CM, KS	Displays the image in its original DICOM size.
	Open Next Study	KS	Auto Open Next Study option.
	Pan	TB, CM, KS	Drags the image any direction.
	Patient Documents	TB	Opens an independent window for viewing, scanning in, and attaching patient documents. Turns blue when documents are available.
	Pencil	TB, CM, KS	Freehand-draws a line.
	Perfect Circle	TB, CM, KS	Draws a circle.
	Play Frames	TB	Starts cine looping.
	Pre-Approve	ETS	Pre-approves the current study.
	Presets	CM	Display Window/Level presets
	Previous Series	KS	Moves to the previous series in the study.
	Print Images	TB	Sends images to a non-DICOM printer.
	Prior Reports	TB	Opens reports. Turns blue when reports are available. Opens prior approved reports regardless of DICOM status (including non-imaging priors).

Tool	Name	Availability	Function
	R Marker	TB, CM, KS	Adds an R (right) marker.
	Radial Angle	TB, CM, KS	Draws a radial angle, which is the angle of the distal radial surface with respect to a line perpendicular to the shaft.
	Radial Length	TB, CM, KS	Draws a radial length.
	Rectangle	TB, CM, KS	Draws a rectangle.
	Reset Frame	TB, KS	Undoes all unsaved changes to the image within the active viewing cell.
	Reset Linked Series	TB, KS	Removes any linkages.
	Reset Stack	TB, CM, KS	Restore images in a stack to their last-saved ordering.
	Reset Study Object	CM	Resets all unsaved changes in the series.
	Reset Viewer	TB, CM, KS	Reverts non-permanent modifications to images in the viewer (zoom, rotation, Window/Level etc.) to their original state.
	ROI	TB, CM, KS	Draws an ellipse to specify an ROI.
	Rotate (Right)	TB, CM, KS	Rotates the image 90 degrees clockwise. Hover over the rotate button to reveal the rotate left button.
	Rotate (Left)	TB, CM, KS	Rotates the image 90 degrees counterclockwise. Hover over the rotate button to reveal the rotate left button.
	Save	ETS	In Exa Trans, saves the current transcription.
	Save Annotations	TB	Saves the current state of annotations.
	Save Image Annotations	KS	Saves the current image annotations.
	Save Series Annotations	KS	Saves the current series annotations.
	Save Study Annotations	KS	Saves the current study annotations.
	Save MPR	CM	Saves the current MPR-generated images.
	Skip	ETS	In Exa Trans, skips the current study and moves to the next.
	Span or Scroll/Span Images	TB, CM, KS	Switches between moving and spanning.
	Set Key Image	TB, CM, KS	Sets the current image as a key image.

Tool	Name	Availability	Function
	Send Image/ Annotations	CM	Opens a dialog for sending the current image to selected AEs.
	Settings	TB, CM	Displays the settings dialog.
	Show Prior List	TB	Opens a dialog with a list of priors that you can select to display in the prior bar.
	Shutter Box	TB, CM, KS	Adds an rectangular shutter.
	Shutter Ellipse	TB, CM, KS	Draws an elliptical shutter.
	Shutter Freehand	TB, CM, KS	Draws a freehand shutter.
	Spine Label	TB, CM	Adds vertebrae labels to spinal images.
	Spine Label Short	TB	Adds vertebrae labels from common starting points.
	Spine Label 3D	TB, CM	Adds vertebrae labels on all series with the same frame of reference.
	Spine Label 3D Short	TB	Adds vertebrae labels from common starting points on all series with the same frame of reference.
	Spine Label 3D Short	TB	Adds vertebrae labels to the same anatomy on all series with the same frame of reference.
	Spine Label Quick 3D Short	TB	Adds vertebrae labels from common starting points to the same anatomy on all series with same frame of reference.
	Study Notes	TB	Displays a dialog for reading/writing notes.
	Switch to 2D	KS	For mammography, switches from 3D to 2D view, if available
	Switch to BTO	KS	For mammography, switches to BTO view, if available
	Switch to C View	KS	For mammography, switches to C view, if available
	Tag Images	TB, CM, KS	Click to tag images in a series for batch annotation.
	Text	TB, KS	Draws text.
	Toggle Annotations	TB, KS	Shows/hides annotations.
	Toggle Overlays	TB, CM, KS	Shows or hides overlays. For MG studies, also shows or hides MG-related information. See also "Toggle DICOM Overlays."
	Toggle DICOM Overlays	TB, CM	Shows/hides DICOM overlays.
	Transcripti on	TB	Opens an independent dictation and transcription window.

Tool	Name	Availability	Function
	Triangulation	TB, CM, KS	Displays the context tool at the same coordinates on all series with the same frame of reference.
	Untag all Images	TB, CM, KS	Untags any images tagged (selected) for batch annotation.
	Vertical Line	TB, CM, KS	Draws a vertical line.
	Window/Level	TB, CM, KS	Adjusts the window/level.
	Zoom	TB, CM, KS	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 Web Trans). 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 Web Trans 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 Web Trans 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

This section contains the following topics.

[Add the Chrome extension]

[Install Exa Trans]

[Install Exa Dictation]

[Install OPAL tools]

[Install Exa Client Viewer]

[Install Exa Scans]

[Install and configure local cache]

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.

Procedure

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.

Procedure

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.

Procedure

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 import, CD import, and CD burning.

Procedure

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 Exa Client Viewer

Symmetry PACS uses a server-side viewer, but you can also install the client-side Opal viewer.

Procedure

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.

Prerequisite: You must uninstall any existing version of Exa Scans before installing a new one.

Procedure

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 and configure 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. On the OFFICE 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 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	Turns automatic caching of the user-selected On Call worklist filter ON and OFF.

Target	Shortcut
Allow Opal Receive	Select to allow receiving, parsing, and storing of Opal protocol files. In the Opal Receive Port, type the port number on which to receive Opal files.
Allow DICOM Receive	Select to allow receiving, parsing, and storing of DICOM protocol files. In the DICOM Receive Port, type the port number on which to receive Opal files.

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 Number of Priors	Select to include priors when prefetching. Select the number of priors to prefetch.
Enable Skinline Detection	Select to make Skinline Detection available when viewing prefetched studies.
Cache Filter Page Size	

6. Select ACTIVATE.

> When local cache is active, a Disable checkbox becomes available in local service settings to turn OFF local cache and stop related services and threads.

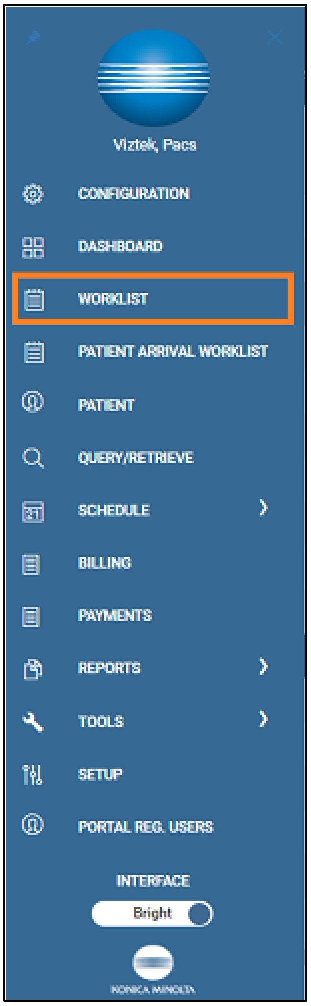
Location and contents of screens

Burger menu

The burger menu contains the following options.

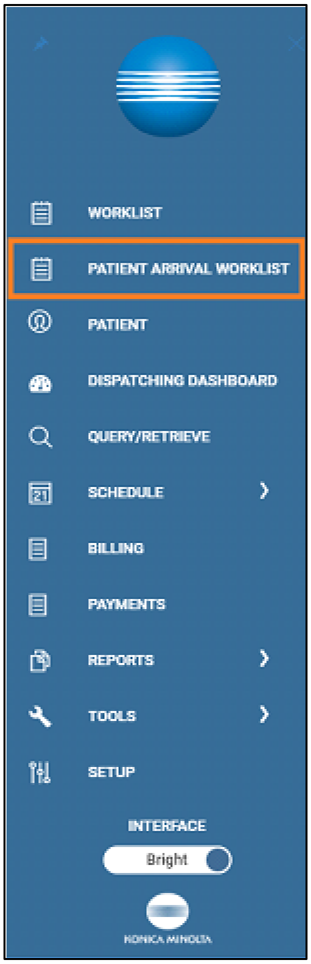
Burger > Worklist

[Return to previously viewed page: Alt + Left Arrow]



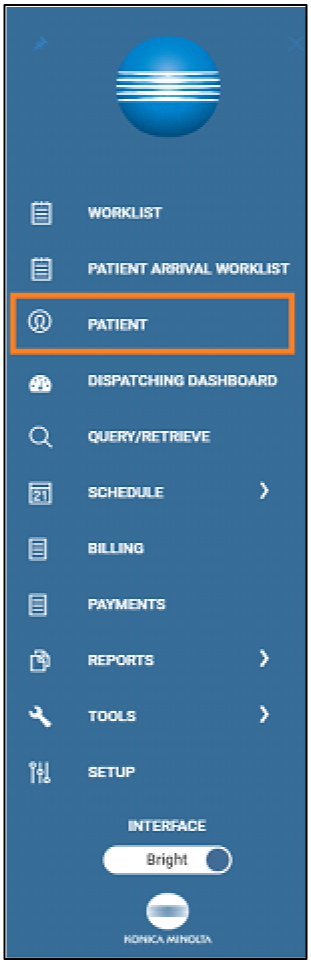
Burger > PATIENT ARRIVAL WORKLIST

[Return to previously viewed page: Alt + Left Arrow]



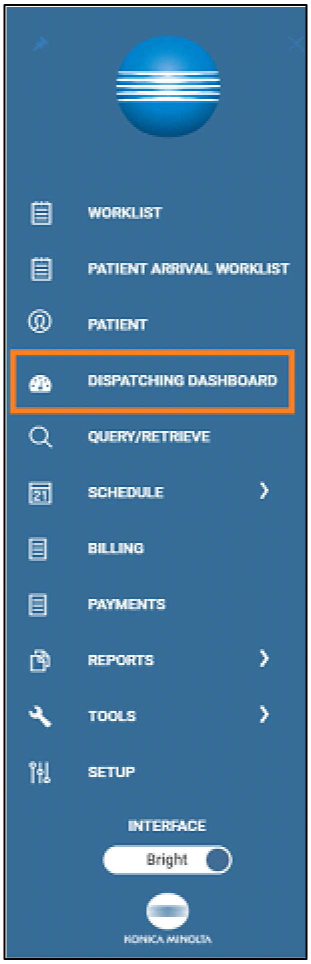
Burger > PATIENT

[Return to previously viewed page: Alt + Left Arrow]



Burger > DISPATCHING DASHBOARD

[Return to previously viewed page: Alt + Left Arrow]



Burger > SCHEDULE

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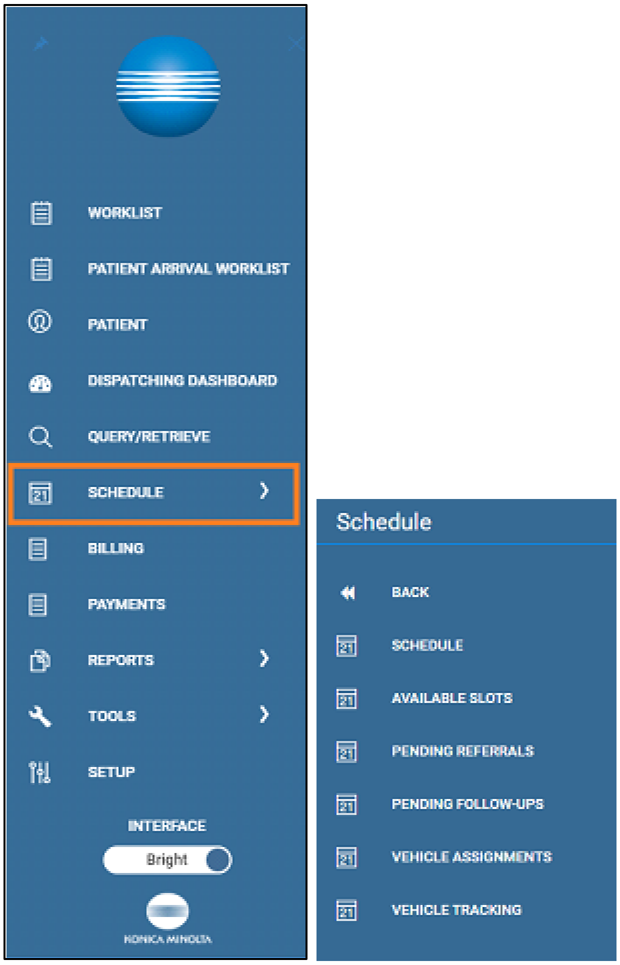
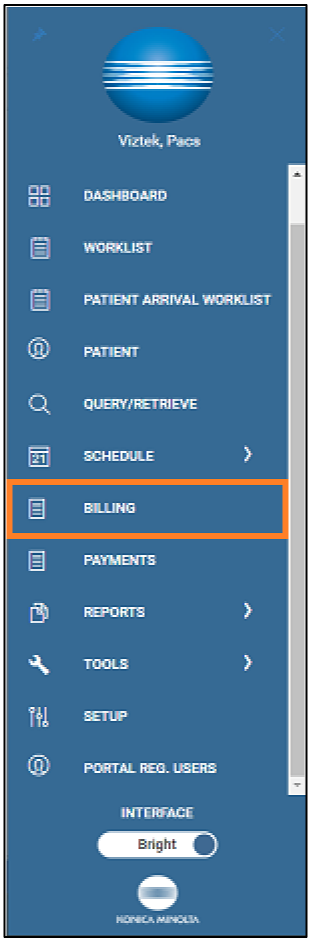


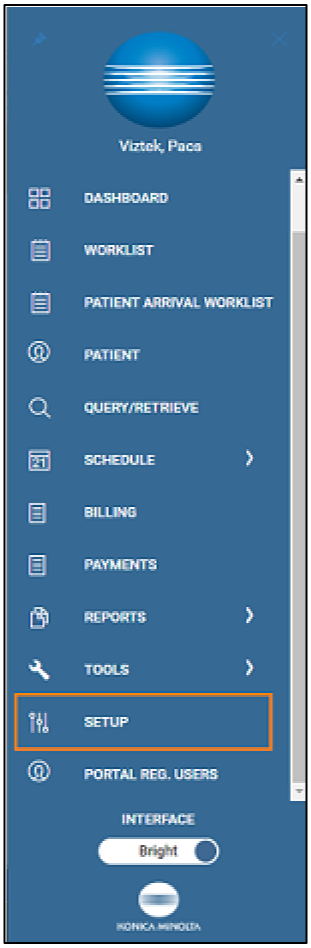
Burger > BILLING

[Return to previously viewed page: Alt + Left Arrow]



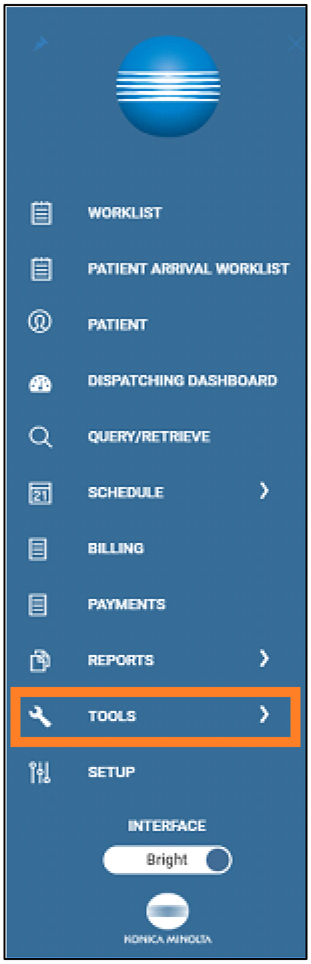
Burger > SETUP

[Return to previously viewed page: Alt + Left Arrow]



Burger > TOOLS

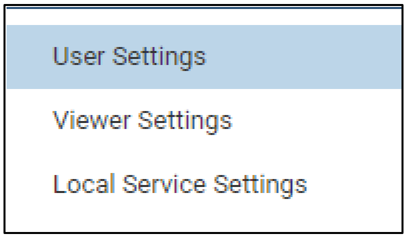
[Return to previously viewed page: Alt + Left Arrow]



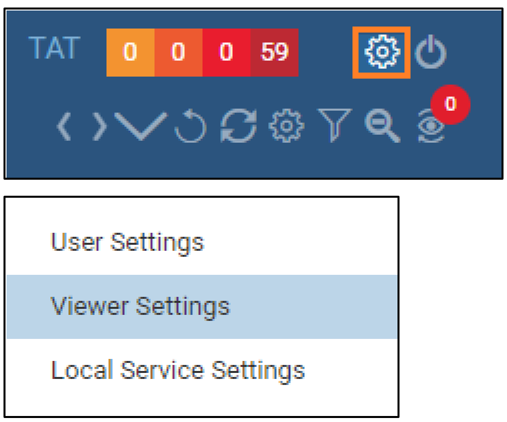
Worklist

Worklist > ALL STUDIES

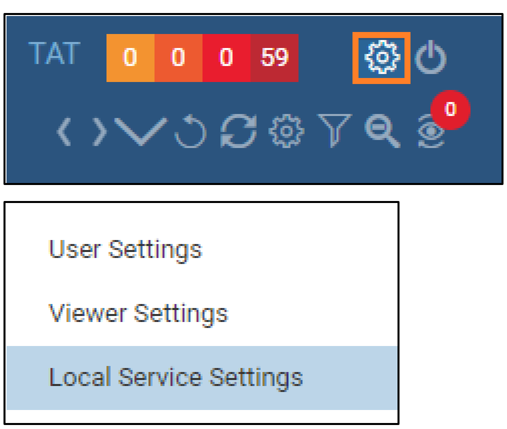
Worklist > Settings > User Settings



Worklist > Settings > Viewer Settings



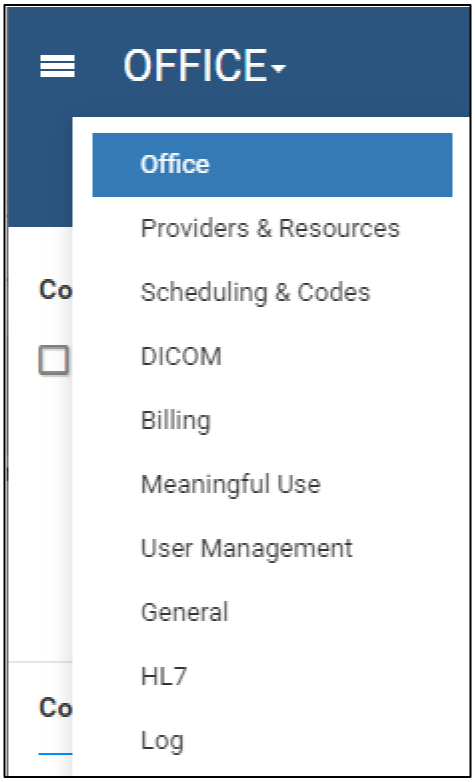
Worklist > Settings > Local Service Settings



Office menu

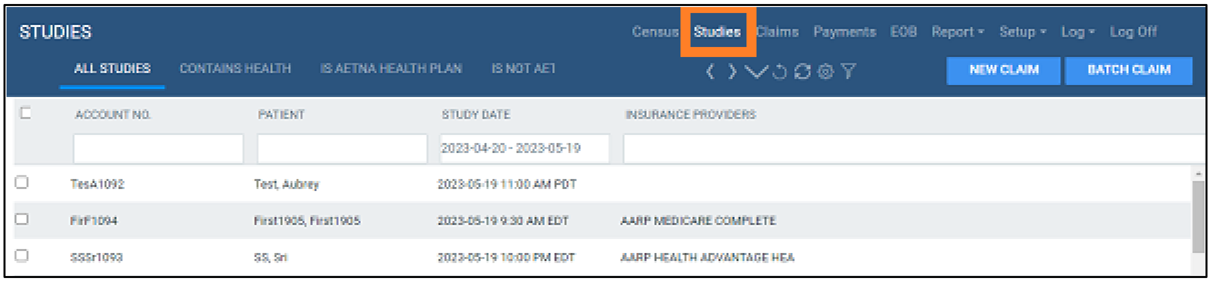
The setup area (or "office") menu contains the following options.

OFFICE > Office

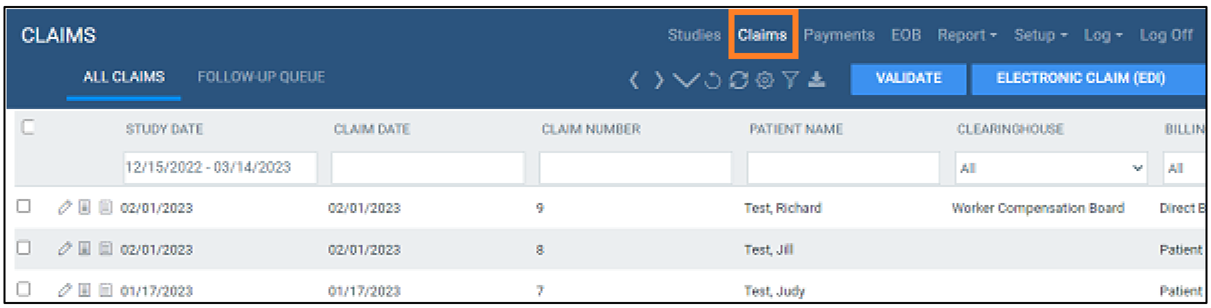


Billing

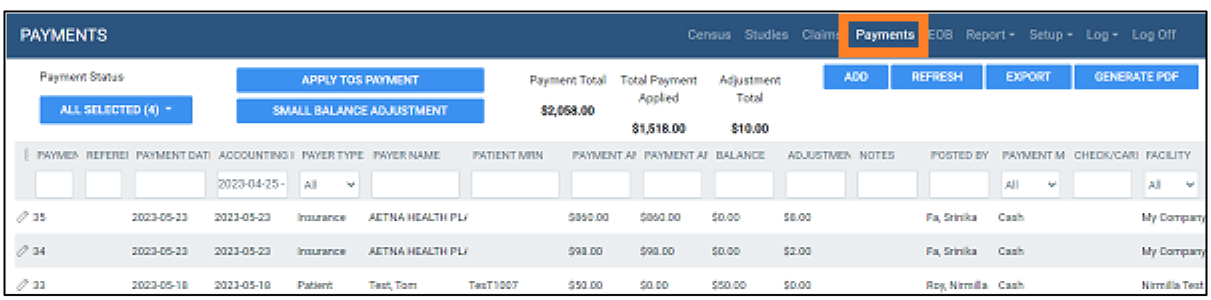
Billing > Studies



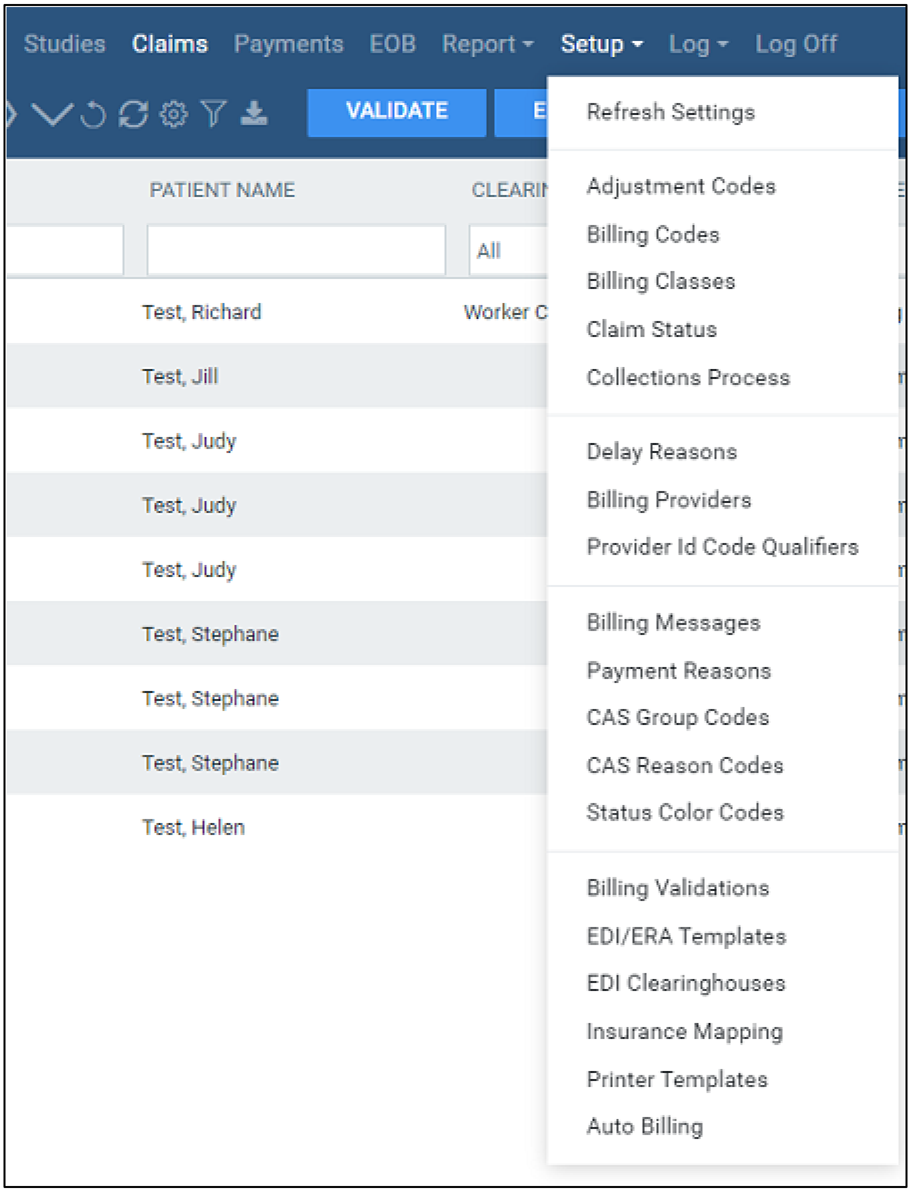
Billing > Claims



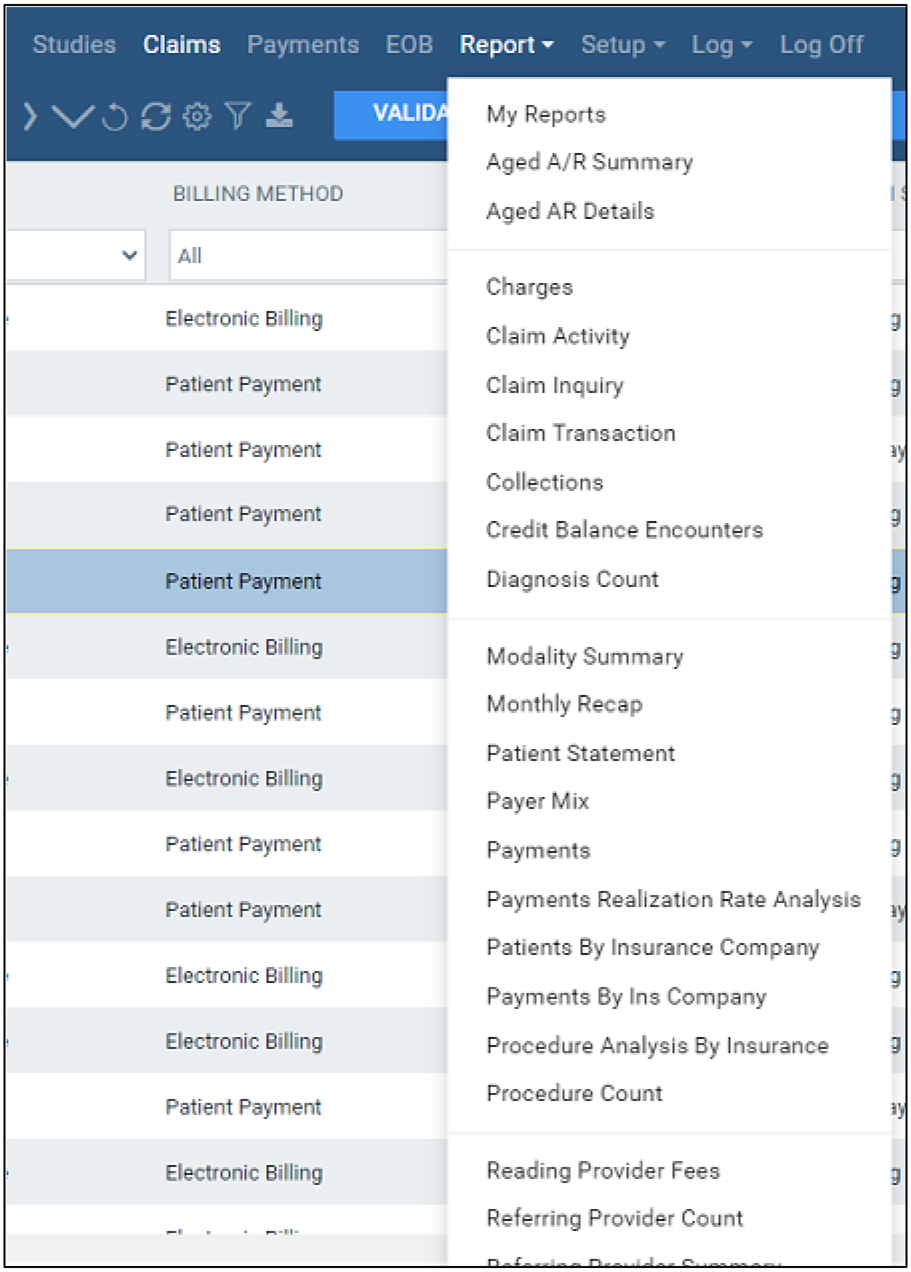
Billing > Payments



Billing > Setup

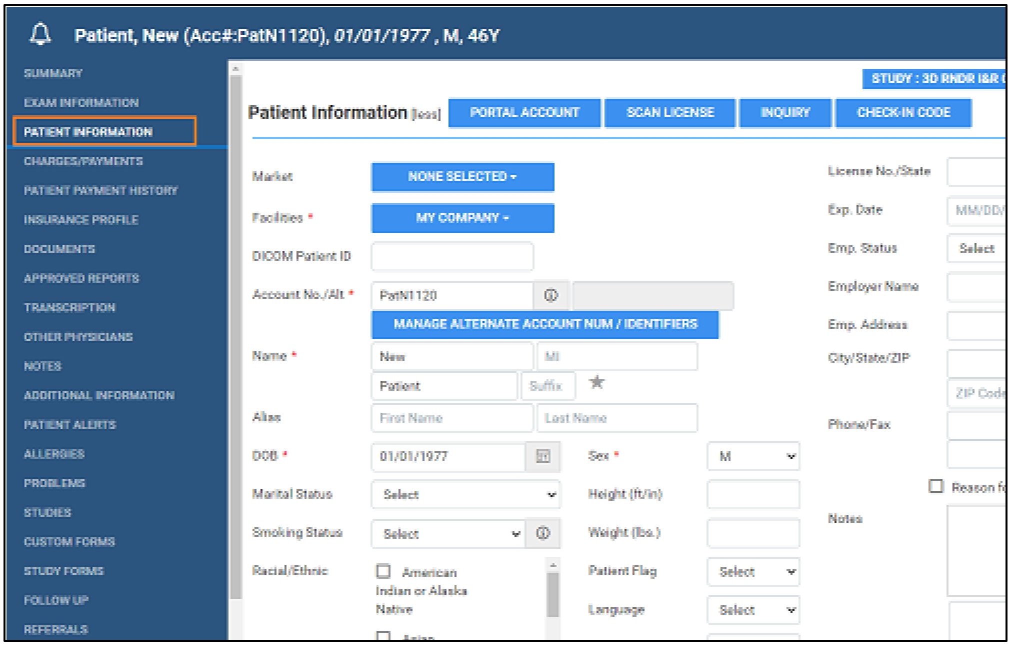


Billing > Report


Studies
Claims
Payments
EOB
Report
Setup
Log
Log Off
VALIDA
BILLING METHOD
All
Electronic Billing
Patient Payment
Patient Payment
Patient Payment
Patient Payment
Electronic Billing
Patient Payment
Electronic Billing
Patient Payment
Patient Payment
Electronic Billing
Electronic Billing
Patient Payment
Electronic Billing
My Reports
Aged A/R Summary
Aged AR Details
Charges
Claim Activity
Claim Inquiry
Claim Transaction
Collections
Credit Balance Encounters
Diagnosis Count
Modality Summary
Monthly Recap
Patient Statement
Payer Mix
Payments
Payments Realization Rate Analysis
Patients By Insurance Company
Payments By Ins Company
Procedure Analysis By Insurance
Procedure Count
Reading Provider Fees
Referring Provider Count

Screens in the Edit Study screen

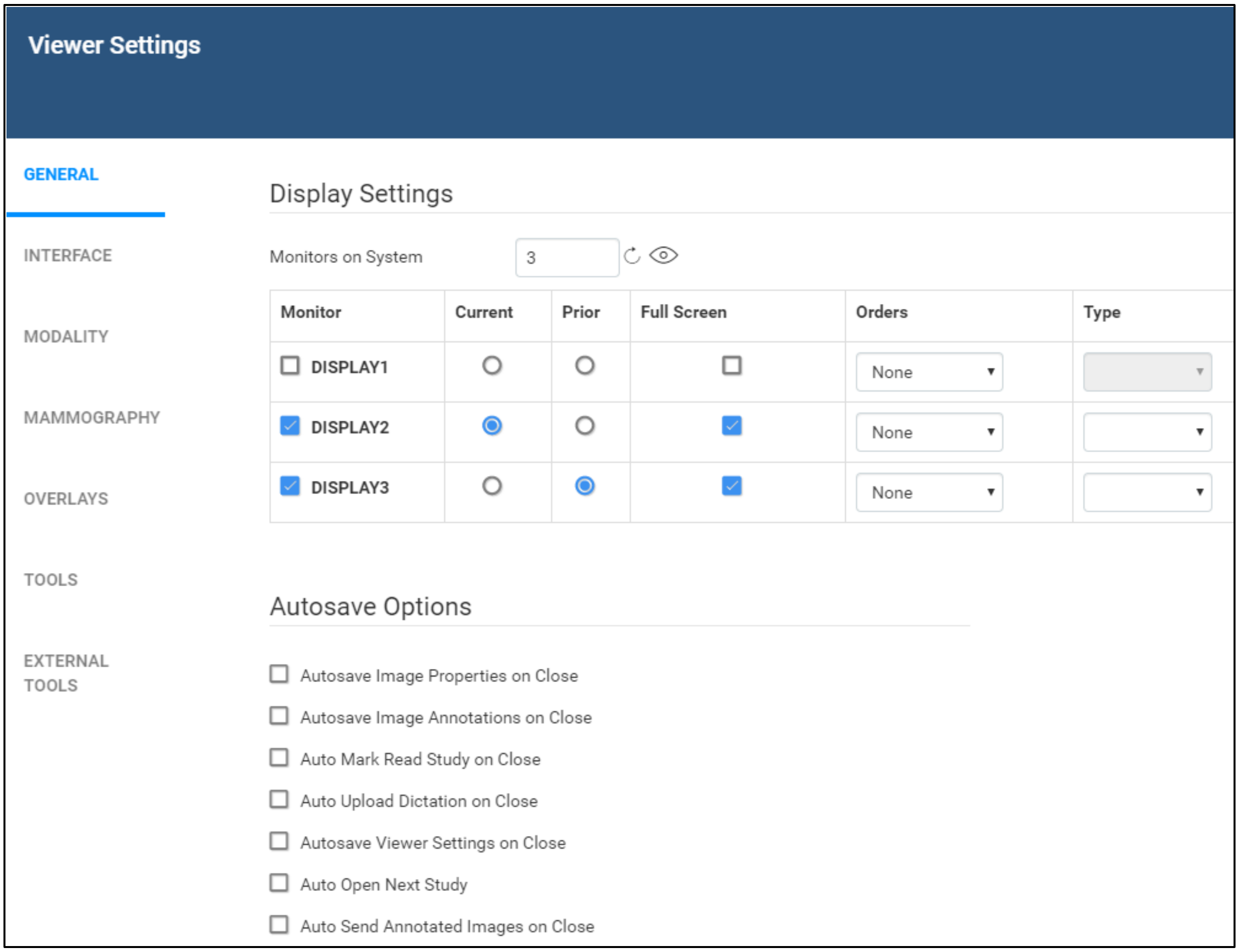
Edit Study > PATIENT INFORMATION



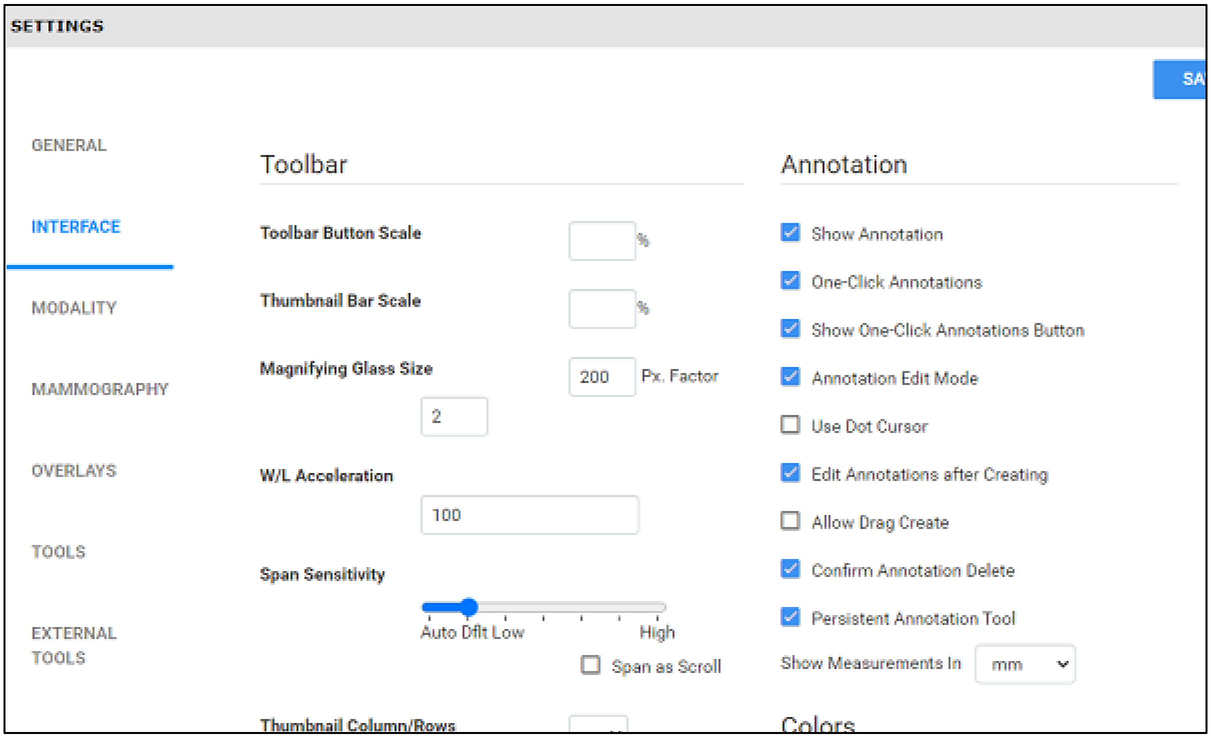
Viewer Settings

Viewer > Settings

Viewer > Settings > General



Viewer > Settings > Interface



Viewer > Settings > Tools