



# Symmetry® PACS

## 34.1.2

### User's Manual

## Table of Contents

|                                                |     |
|------------------------------------------------|-----|
| Introduction .....                             | 3   |
| Symbols .....                                  | 3   |
| Indications for use .....                      | 4   |
| Training .....                                 | 4   |
| Regulatory and compliance .....                | 4   |
| System requirements .....                      | 4   |
| Calibration and measurement accuracy .....     | 5   |
| Getting started .....                          | 6   |
| Configure your working environment .....       | 6   |
| Configure Symmetry PACS .....                  | 19  |
| Work with the hamburger menu .....             | 161 |
| Work with the dashboard .....                  | 161 |
| Work with the worklist .....                   | 164 |
| Work with dictation and transcription .....    | 251 |
| Work with the Symmetry PACS viewer .....       | 273 |
| Work with Display Management .....             | 325 |
| Work with the patient chart .....              | 339 |
| Work with query and retrieve .....             | 360 |
| Work with reports .....                        | 361 |
| Work with tools .....                          | 364 |
| Work with Patient Portal .....                 | 366 |
| Work with Physician and Attorney Portals ..... | 367 |
| Appendix .....                                 | 368 |
| Reference .....                                | 368 |

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

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

## 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

See document, "Exa PACS|RIS System Requirements."

## 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](#)

[Configure Symmetry PACS](#)

## 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](#)

[Turn off Chrome autofill](#)

[Other Chrome settings](#)

[Sign in to the Exa platform](#)

[About two-factor authentication](#)

[Sign in using 2FA with email](#)

[Sign in using 2FA with Google Authenticator](#)

[Reset your password](#)

[Change your password](#)

[Add an avatar](#)

[Edit your user profile](#)

[View version information](#)

[Create a shortcut for Symmetry PACS](#)

[Calibrate monitors](#)

## Configure the language in Chrome

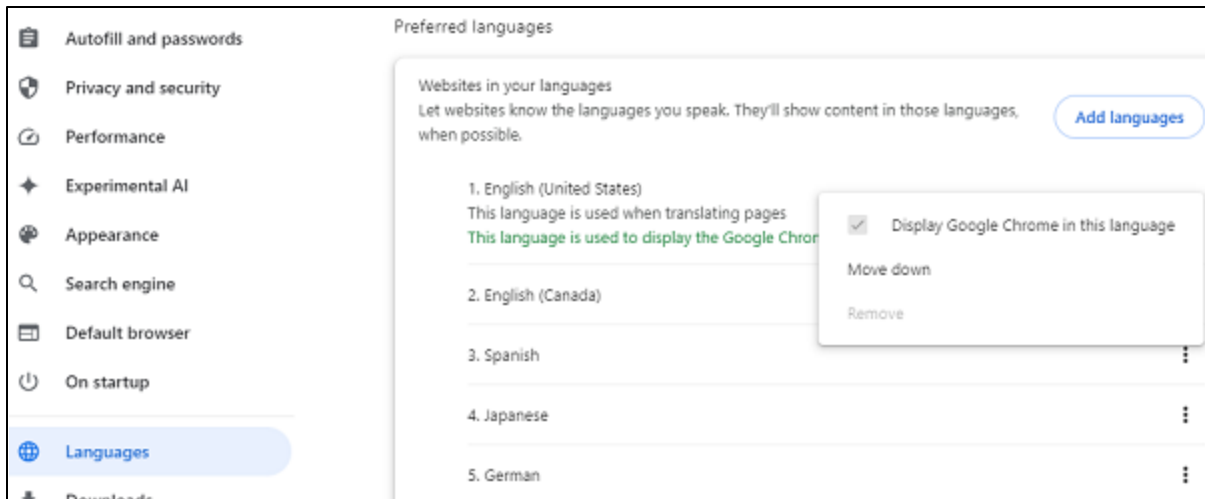
You must configure the browser language of your client computer as follows.

### Procedure

1. In Chrome, select the customize  button, and then select Settings.
2. On the left pane, select Languages.
3. Under Preferred languages, if the local language and culture does not appear in the list, select Add languages, and then add the language.



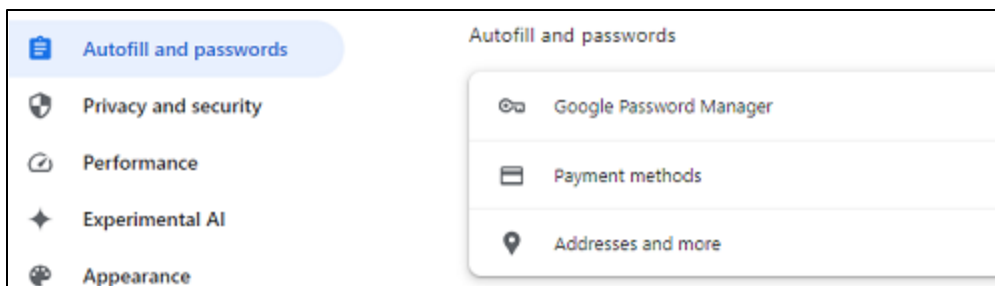
Note: The culture must be correct. For example, in Canada, ensure that English (Canada) is installed.



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

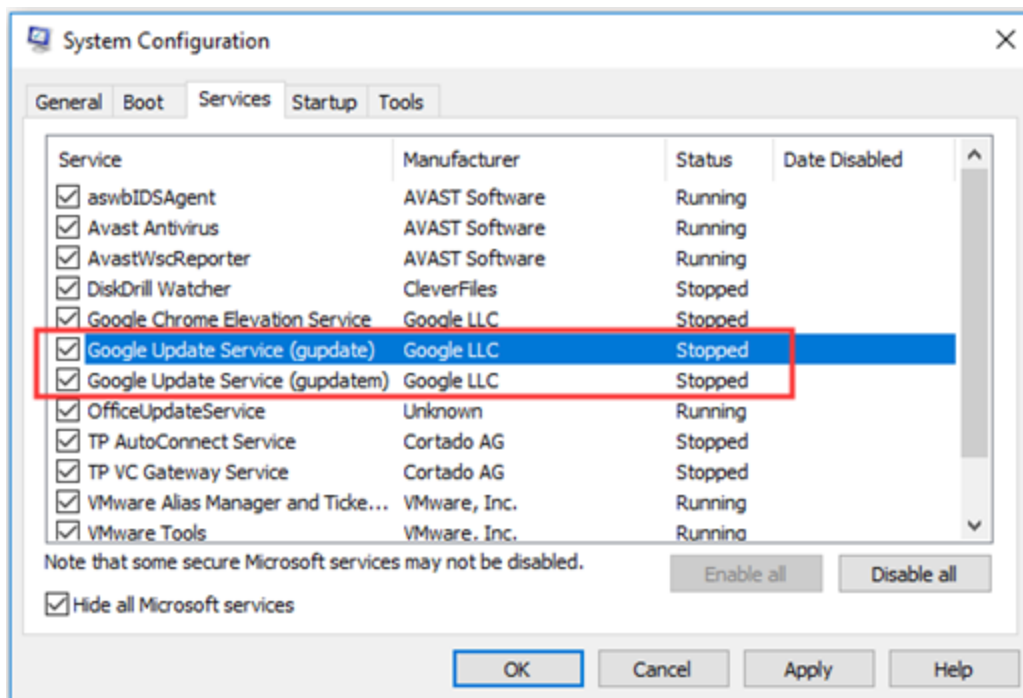
1. In the Chrome menu, select Settings.
2. Select Autofill and passwords > Addresses and more.
3. Turn off Save and fill addresses.

## 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.



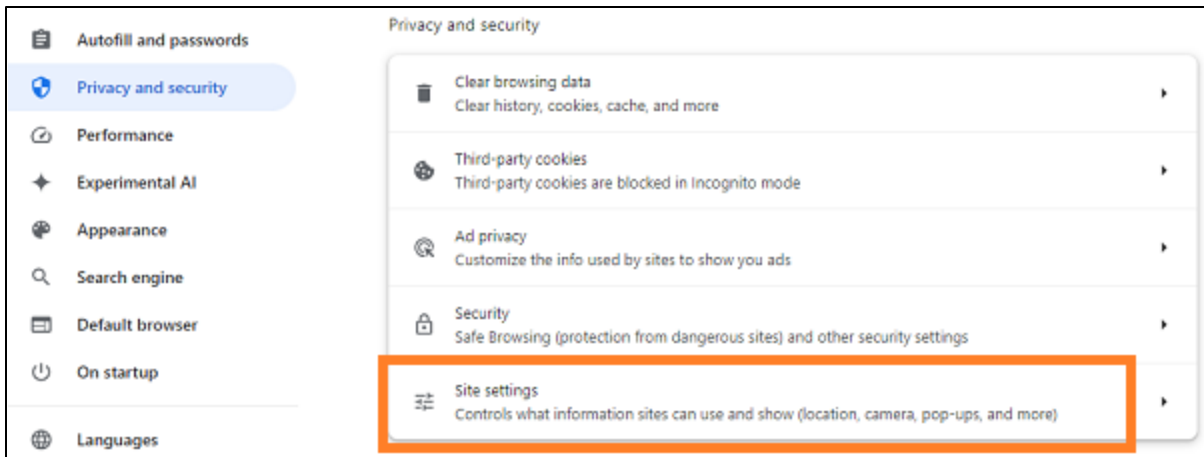
4. Clear the Google Update Service (gupdate) and Google Update Service (gupdatem) checkboxes.
5. Select Apply, OK.
6. If prompted, restart your computer.

## Other Chrome settings

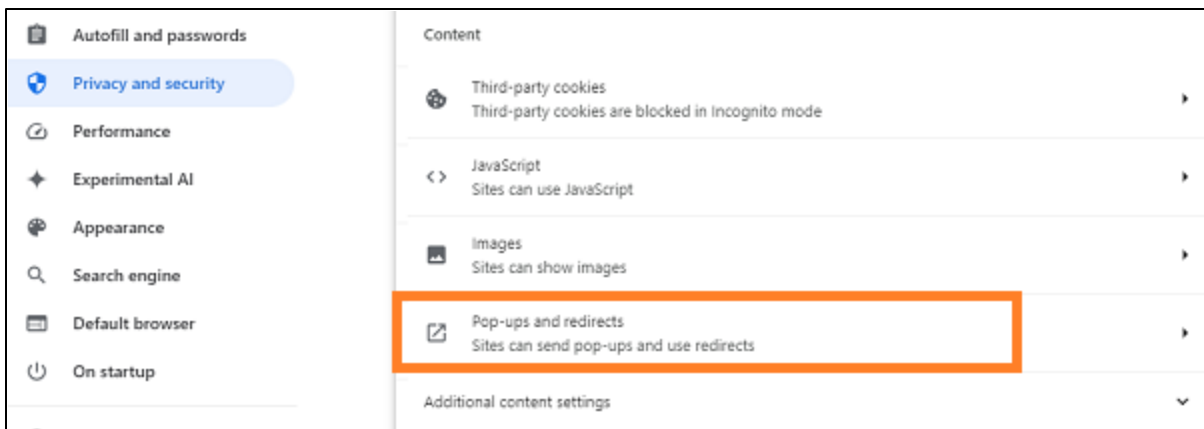
When using multiple monitors, the program uses pop-ups to display the viewer and multi-panel, therefore you need to configure Chrome to allow pop-ups. Also, optional memory and power settings may increase your performance under certain conditions.

### 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.

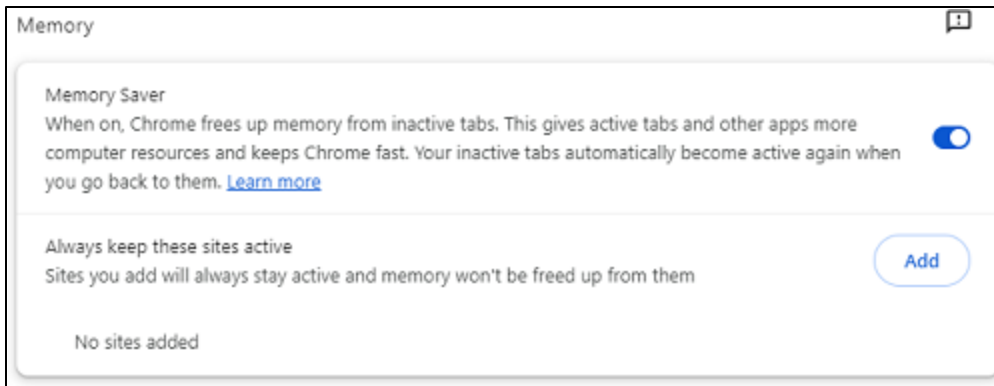


4. Select Sites can send pop-ups and use redirects.
5. Refresh the browser to apply the new settings.

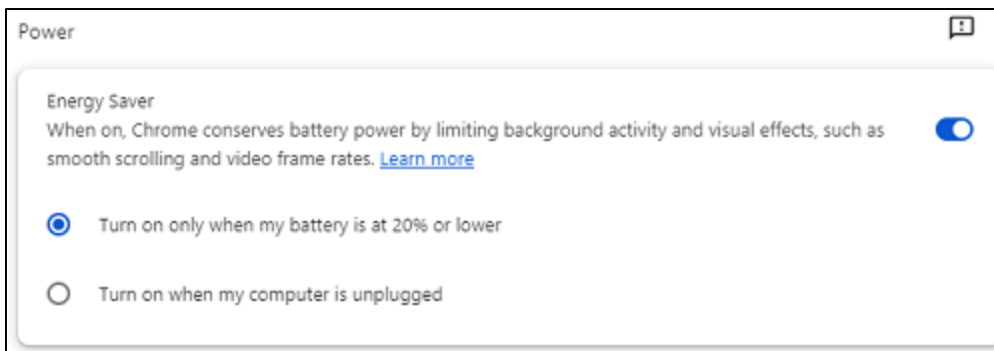
### Memory and Power

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.

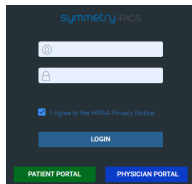


- Under Power, turn on Energy Saver.



## Sign in to the Exa platform

You can sign in to the main application or a portal.



- In Chrome, go to the URL given to you by your Konica Minolta representative.
- Enter your sign-in credentials.
- Select the I agree to HIPAA Privacy Notice checkbox.
- 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 an 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 an authenticator app](#)

## 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 an authenticator app](#)

## Sign in using 2FA with an authenticator app

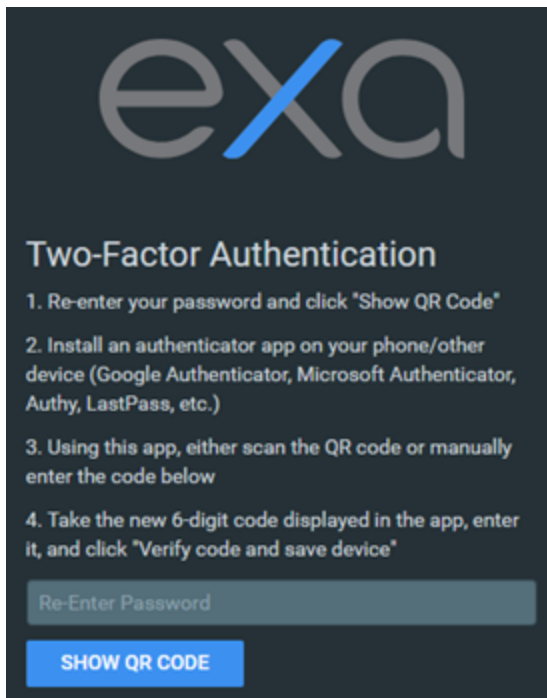
You can use an authenticator app such as Google Authenticator to sign rather than an email token.



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

### Procedure

1. On your device, from your phone's application store, download and install an authenticator app such as Google Authenticator.
2. *For individual accounts*, skip to the next step.  
*For shared or service accounts*, in the QR code window, copy the setup key (the text below the QR code), and paste it into a secured online location (such as Datto) so subsequent users can access the key for their own 2FA sign-ins.
3. On the Exa PACS|RIS sign-in screen, enter your credentials and select Login.
4. In the dialog, re-enter your password and select SHOW QR CODE.



The image shows a dark-themed screen for Two-Factor Authentication. At the top is the 'exa' logo. Below it is the title 'Two-Factor Authentication'. There are four numbered steps: 1. Re-enter your password and click 'Show QR Code'; 2. Install an authenticator app on your phone/other device (Google Authenticator, Microsoft Authenticator, Authy, LastPass, etc.); 3. Using this app, either scan the QR code or manually enter the code below; 4. Take the new 6-digit code displayed in the app, enter it, and click 'Verify code and save device'. Below the steps is a text input field labeled 'Re-Enter Password' and a blue button labeled 'SHOW QR CODE'.

**exa**

## Two-Factor Authentication

1. Re-enter your password and click "Show QR Code"
2. Install an authenticator app on your phone/other device (Google Authenticator, Microsoft Authenticator, Authy, LastPass, etc.)
3. Using this app, either scan the QR code or manually enter the code below
4. Take the new 6-digit code displayed in the app, enter it, and click "Verify code and save device"

Re-Enter Password

**SHOW QR CODE**

5. When the QR code appears, use your mobile device to scan the code.



The image shows a dark-themed screen for Two-Factor Authentication. At the top is a large QR code. Below it is a text input field labeled 'Re-Enter Password' and a blue button labeled 'SHOW QR CODE'. Below the QR code is a text input field labeled 'Verify one-time code' and a blue button labeled 'VERIFY CODE AND SAVE DEVICE'.

**exa**

## Two-Factor Authentication

1. Re-enter your password and click "Show QR Code"
2. Install an authenticator app on your phone/other device (Google Authenticator, Microsoft Authenticator, Authy, LastPass, etc.)
3. Using this app, either scan the QR code or manually enter the code below
4. Take the new 6-digit code displayed in the app, enter it, and click "Verify code and save device"

Re-Enter Password

**SHOW QR CODE**

Verify one-time code

**VERIFY CODE AND SAVE DEVICE**

6. On your mobile device, if prompted to save the new token for Exa PACS|RIS, select Yes.

7. In your authenticator app, find the code corresponding to the new token, type it in the Verify one-time code box in the figure above, and select VERIFY CODE AND SAVE DEVICE.

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.

**My Profile** EXA Version 1.4.34-414  
UDI (01)00817100020193(10)01-04-034

☐ Always Open Schedule Book in a New Tab

Rows to Display: 50 Themes: default Culture: English-US ☐ Pin Burger Menu

☐ Hide Worklist Icons ☐ Hide Order Menu

Bandwidth: Select

Session Interval: 300 min (10-600)

Default Scheduling: ☒ Radiology

Current Password:  New Password:  Confirm Password:

**SAVE PASSWORD**

☒ Min password length: 10  
☒ Max password length: 30  
☒ Number of uppercase letters: 1  
☒ Number of lowercase letters: 1  
☒ Number of numerical characters: 1  
☒ Number of special characters: 1

**As you type, guides you to satisfy password requirements**

Buttons: Choose File, NO F...OPEN, DELETE AVATAR, SAVE, 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

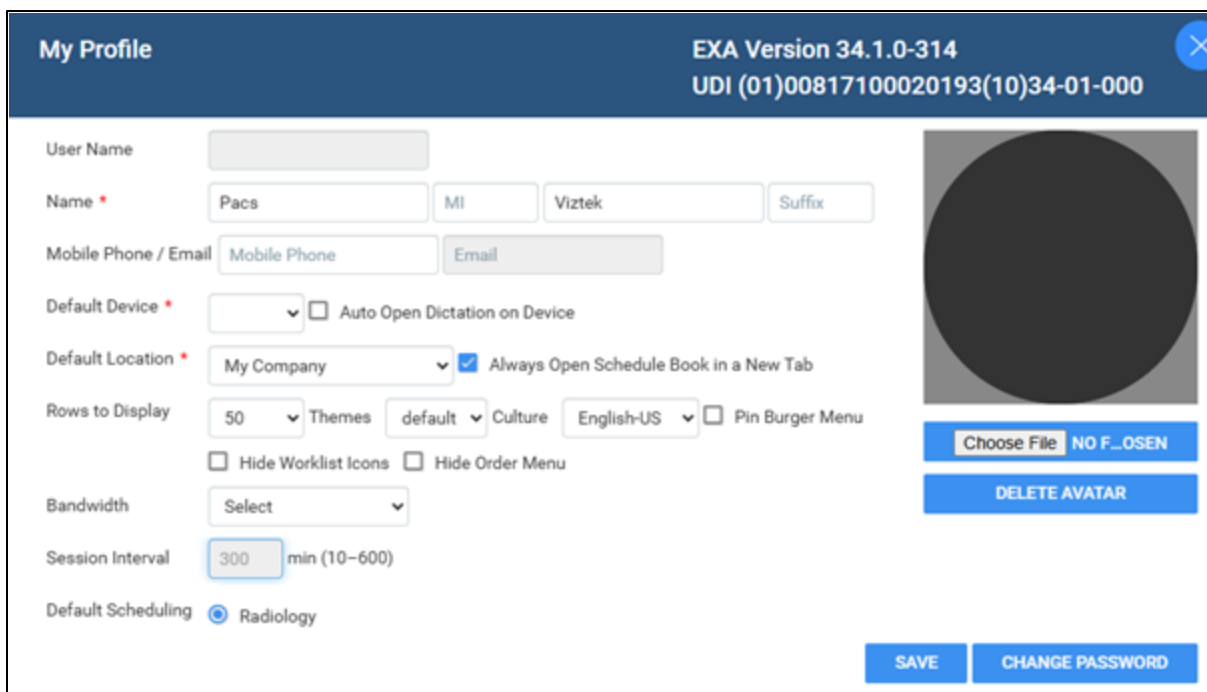
Each user of Symmetry PACS has a profile with sign-in credentials and basic customization settings. After signing in, you can view and edit your settings.

### Procedure

1. Select the burger  button.
2. At the top of the burger menu, select the blue Konica Minolta globe or user's avatar:



Result: The My Profile screen appears.



**My Profile** EXA Version 34.1.0-314  
UDI (01)00817100020193(10)34-01-000

User Name

Name \*

Mobile Phone / Email

Default Device \*  ☐ Auto Open Dictation on Device

Default Location \*  ☒ Always Open Schedule Book in a New Tab

Rows to Display  Themes  Culture  ☐ Pin Burger Menu

☐ Hide Worklist Icons ☐ Hide Order Menu

Bandwidth

Session Interval  min (10-600)

Default Scheduling ☒ Radiology

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                       | Read Only. 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.

| About                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                |
|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>App/DB/Misc</b><br>Exa: 1.4.32-p3-135<br>Node: v16.16.0<br>PostgreSQL: 14.4<br>NGINX: 1.23.1<br>Redis: Not Found<br>TxTransportation: Not Found | <b>Services</b><br>C-Move Service: 1.4.32.50<br>DICOM Service: 1.4.32.50<br>Fax Service: 1.4.32.50<br>ffmpeg: Not Found<br>imageserver_http:> 1.4.32.50<br>Image Service: Not Found<br>MWL Service: 1.4.32.50<br>Opal Listener Service: 1.4.32.50<br>Opal Sender Service: 1.4.32.50<br>Dicom Print Service: 1.4.32.50<br>Storage Commitment Service: Not Found |
| <b>System</b><br>OS Type: Windows_NT<br>OS Platform: win32<br>OS Architecture: x64<br>Total System Memory: 12.00 GB                                | <b>Tools</b><br>Opal Tools Setup: Not Found<br>Opal Viewer Setup: Not Found<br>EXA Trans: Not Found<br>EXA Doc Scan: 1.0.11.0                                                                                                                                                                                                                                  |

## 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 > COMPANYY.

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.                                         |
|                     | 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 |

| Setting           | Description                                |                                                                                                                              |
|-------------------|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
|                   |                                            | 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       | See Configure Peer Review general settings |                                                                                                                              |
| 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.                                |

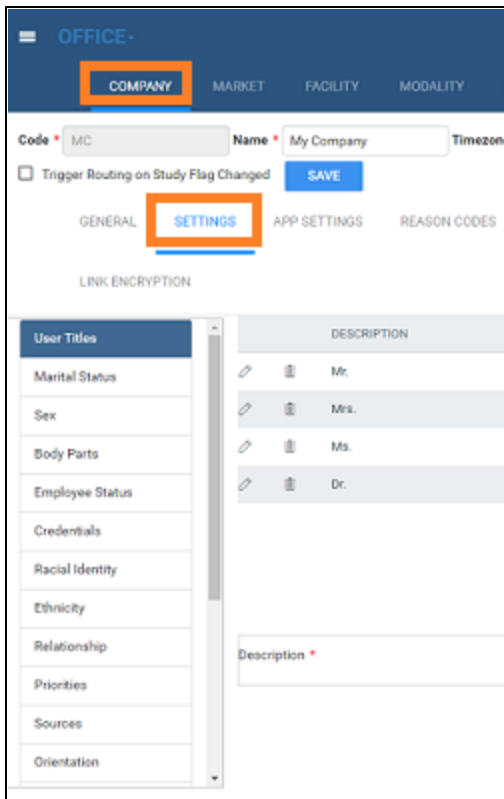
4. Select SAVE ALL INFO.

## 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.                                                                       |
| 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     | Laterality as they pertain to the study.                                                                     |
| Languages       | Patients' preferred languages.                                                                               |
| Specialties     | Healthcare worker specialties such as oncology or sports medicine.                                           |

| Setting                   | Description                                                                |
|---------------------------|----------------------------------------------------------------------------|
| 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. |

| Setting                    | Options                                                                                                                                                                                                                              | Description                                                                                                                                                                                                                                                                 |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 <a href="#">Require document review</a> .                                                                                                                            |
| 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 Symmetry PACS.<br><br>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).<br><br>Select the requested procedure priority to assign to outbound studies that are in the stat level you are configuring.                     |
| TAT                        | Description/ Colors                                                                                                                                                                                                                  | Select the edit  icon of a TAT to modify its description, text color, and background color. You can set the max TAT for a facility under Setup > [all uppercase menu] > Office > Facility. |
| Patient Arrival Wait Times | Use the following settings to configure color-coded descriptions corresponding to lengths of time that a patient waits upon arrival. These bands of time appear in the wait time monitor at the top of the Patient Arrival Worklist. |                                                                                                                                                                                                                                                                             |
|                            | Description                                                                                                                                                                                                                          | Type a description for the band such as "Short Wait" or "Long Wait."                                                                                                                                                                                                        |
|                            | Color                                                                                                                                                                                                                                | Background color for arrivals at the current wait time.                                                                                                                                                                                                                     |
|                            | Text Color                                                                                                                                                                                                                           | Text color for arrivals at the current wait time.                                                                                                                                                                                                                           |
|                            | Minutes                                                                                                                                                                                                                              | Type the maximum number of minutes that a patient waits to remain in the band.                                                                                                                                                                                              |
| Access Reasons             | Reasons for accessing confidential patient records when using the Break the Glass function.                                                                                                                                          |                                                                                                                                                                                                                                                                             |
|                            | Code                                                                                                                                                                                                                                 | Type an internal code for the reason.                                                                                                                                                                                                                                       |
|                            | Description                                                                                                                                                                                                                          | Type a name or description of the reason such as, "Direct patient care."                                                                                                                                                                                                    |
| Ordering Facility Types    | Description                                                                                                                                                                                                                          | Type a description such as "Assisted Living" or "Prison."                                                                                                                                                                                                                   |

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.

- On the left pane, select a category.
- On the right pane at the bottom, type a reason.
- Optional: To make inactive reasons 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."                                                                                                                      |

- 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 Symmetry PACS, or Custom to define your own formatting. |
| Prefix             | Type a prefix to prepend to the MRN. To be able to modify the prefix, select Can Edit.                             |
| Suffix             | Type a suffix to append to the MRN.                                                                                |
| Allow Duplicates   | Select to allow duplicate MRNs.                                                                                    |
| Prefix/Suffix Max. | Select Fixed Length (above), and then type or select the maximum length of the MRN prefix and suffix.              |
| 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.

The screenshot shows the 'OFFICE-' configuration page. The 'COMPANY' tab is selected. Below the header, there are fields for 'Code' (MC), 'Name' (My Company), and 'Timezone' (US/Eastern). There are also checkboxes for 'Enable LDAP', 'Enable RCopy Service', 'Enable Payment Gateway', and 'Trigger Routing on Study Flag Changed'. A 'SAVE' button is present. Below these are several sub-tabs: 'GENERAL', 'SETTINGS', 'APP SETTINGS', 'REASON CODES', 'MRN INFORMATION', and 'ACCESSION INFORMATION' (which is highlighted with an orange box). Under 'ACCESSION INFORMATION', there are input fields for 'Prefix', 'Suffix', and 'Preview', along with a 'SAVE' button.

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.



Note:

- To ensure the safety and privacy of medical institutions and their patients, passwords must now contain at least 1 character of various types.
- Please encourage users to create complex passwords. If possible, use a third-party password complexity checker.
  - Weak passwords are typically found in seconds to minutes
  - Medium passwords in days
  - Strong passwords in months to a few years
  - Very strong passwords in several years or longer
- Additional requirements will be introduced in future versions to maintain conformance with global standards such as NIST 2024/2025.
- We also recommended using the Account Lockout Threshold option in [General settings](#) to help prevent brute-force attacks on credentials.

### 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.<br><br>Minimum: Enter a value in the range from 12 to 64 characters<br><br>Maximum: Set in the range from 30 to 64 characters |                                                                                                                                 |
| Passwords Must Contain [ ]                                   | Uppercase Letters                                                                                                                                                                                         | Symmetry PACS validates passwords based on these selections.<br><br>Enter a value in the range from 1 to 5 characters for each. |
| Minimum Number of ...                                        | Lowercase Letters                                                                                                                                                                                         |                                                                                                                                 |
|                                                              | Numbers                                                                                                                                                                                                   |                                                                                                                                 |
|                                                              | Symbols or Special Characters                                                                                                                                                                             |                                                                                                                                 |
| Report Password                                              | Type the default password for emailing approved reports if a resource password was not configured.                                                                                                        |                                                                                                                                 |
| '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        | Optional: Select to require password resets of a specified interval.                                                                                                                                      |                                                                                                                                 |
| Users Cannot Reuse the Last [ ] Passwords                    | Select to prevent users from reusing one of their previous passwords, then type a number of passwords from 3 to 20.                                                                                       |                                                                                                                                 |



Note: When a user changes a password in various parts of the program, it guides them by showing which of the above requirements are being met as they type.

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    | [Available in Alberta only]<br>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.                                                    |

| Setting                                  | Description                                                                                                                                                                                                                                                               |
|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fee Override                             | Type the fee override code, which takes precedence over any modifier created previously.<br><br>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.

OFFICE- COMPANY MARKET **FACILITY** MODALITY MODALITY ROOM GROUP CHAT ROOMS

**ADD** **RELOAD**

☒ Hide Inactive

| CODE | NAME               | MARKET |
|------|--------------------|--------|
| AD   | srinika Facility 1 | All    |
| ang1 | Angie Facility     |        |
| F123 | Meera 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.

Code \*  ☐ Inactive

Name \*

Market

Contact No.

Fax No.

Send Reports to Fax No. ☐

Email

Email Report Link ☐

Report Password

Email Attachment ☐

Timezone \*

Mammo License ID

Max TAT  (in min)

☐ Enable Alt. Acc. No.

☐ Require SSN

☐ Require Primary Phys.

PokitDok Response

Updax Account ID

Send fax via Updax ☐

Upload Logo  No file chosen  
Max file size: 20MB

Current Logo No logo uploaded

Remove Logo

Address Line 1

Address Line 2

City/State/ZIP   ZIP Code

File Store

☐ Associate all appointment types to this facility

☐ Show Patient Alerts

☐ Show Recent Schedules

☐ Enable Veterinarian Registration

☐ Mobile Rad Dispatching Address

☐ Do Not Allow Overlapping Procedures to Be Scheduled

☐ Import Documents into Study as DICOMs

☐ Global Auto-Print

☐ Abbreviated Receipt

☐ Custom Receipt

☐ Exclude from all Portals (All Portals & Break the Glass)

Required Fields at Scheduling

Required Fields for Creating a Preorder

Study Status when Patient Arrives \*

Study Status when Patient in Room \*

Report Delay to Patient  (in days)

Portal

Formal Name

Facility Notes

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                                     | Available when Email Report Link or Email Attachment are selected.<br>Type the password needed to view reports on ReportLink. Used to open approved reports that are emailed to the facility using the email address provided in this section.                                        |
| Email Attachment                                    | Select to receive reports by attachment.                                                                                                                                                                                                                                              |
| Timezone                                            | Select the time zone used by your facility.                                                                                                                                                                                                                                           |
| Mammo License ID                                    | Type the facility's mammography license ID.                                                                                                                                                                                                                                           |
| Max TAT                                             | Type the maximum allowed turnaround time, in minutes, before a breach of contract occurs.                                                                                                                                                                                             |
| Enable Alt. Acc. No.                                | Select to use 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 <a href="#">Configure a file store</a> .                                                                                                                                                                               |
| 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.<br>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.                                                                                                                                                                            |

| Setting                                                  | Description                                                                                                                                                       |
|----------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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. The following fields become available:<br>Name<br>Country<br>Address, City, State, ZIP<br>Phone/Fax |
| 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 <a href="#">MRN information</a> .                                                                                                                             |

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.

OFFICE -

COMPANY MARKET FACILITY **MODALITY** MODALITY ROOM GROUP CHAT ROOMS

ADD RELOAD

☒ Hide Inactive

| NO. | CODE | NAME                |
|-----|------|---------------------|
| 1   | BD   | Bone Densitometry   |
| 2   | BR   | BR Modality         |
| 3   | CT   | Computed Tomography |

2. Select ADD.

Code \*  ☐ Inactive

Name \*  ☐ Hidden on Physician Portal

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 you 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

- Go to [SETUP](#) > [OFFICE](#) > Office > MODALITY ROOM.

- On the MODALITY ROOM sub-tab, select ADD.

- Enter the following settings.

| Setting    | Description                                                                                                                                                                                    |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Code       | Type your unique internal code or name for the modality room.                                                                                                                                  |
| Name       | Type a name for the modality room.                                                                                                                                                             |
| Facility   | Select the facility where the modality room is located.                                                                                                                                        |
| 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). |

| Setting           | Description                                                                                                                                                                        |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.                                |
| From Date/To Date | Select a date range in which you can view studies on the schedule book.<br>Note: Set the To Date according to how long you plan to keep using the room.                            |
| DMWL              | Select the AEs in the room to which to serve the worklist. Only the selected AEs will receive orders for that room.                                                                |

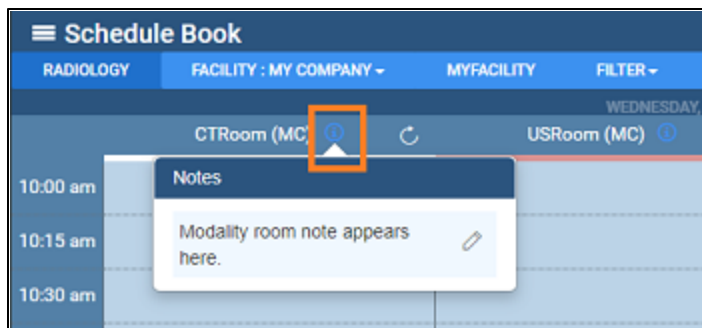
- On the MODALITYTIMES sub-tab, select the [here](#) link, and then add a schedule template to the room.
- Optional: On the LINKED RESOURCES sub-tab, select which treatment resource is associated with the modality room (technologist or Mobile RAD vehicle), and then type or select the name of the resource.
- Select SAVE.

See also:

Configure a schedule filter

## Add modality room notes

You can add a *modality room note* of up to 500 characters to a modality room. For example, you could leave a note alerting staff that an MRI modality room has a weight limit of 350 pounds. Modality room notes appear in a pop-up window on the schedule book when you select the information button in a column header.



### Prerequisites:

- [Add modalities](#), [Add a facility](#), and [Add modality rooms](#).
- Obtain the Modality Room Notes user right.

### Procedure

- Go to [SETUP](#) > [OFFICE](#) > Office > MODALITY ROOM.
- Optional. To filter the list of notes, select options in the Facilities dropdown list, and type or select criteria in the column headers.

- On the MODALITY ROOM NOTES sub-tab, select ADD.

- Enter the following settings.

| Setting        | Description                                                              |
|----------------|--------------------------------------------------------------------------|
| Modality Rooms | Select to which modality rooms the note applies.                         |
| Notes          | Type the note.                                                           |
| Start/End Date | Select a date range in which the note is available on the schedule book. |

- Select SAVE.

## Add a notification

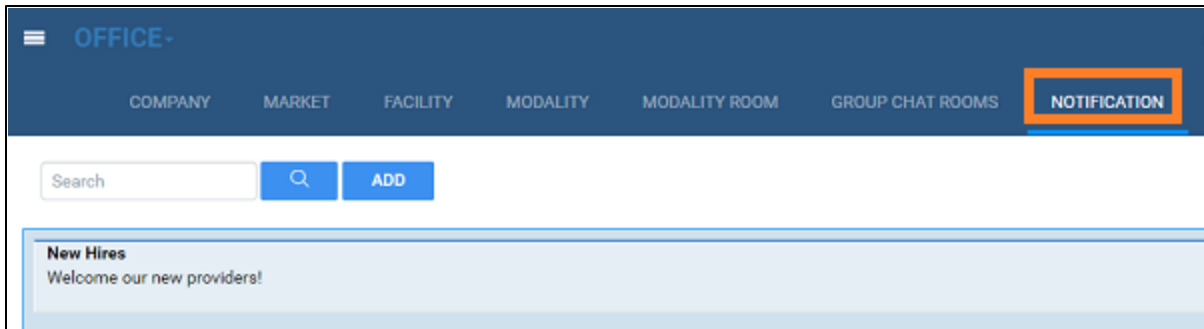
You can preconfigure notifications (for example, a welcome message) to appear on the dashboard, physician portal, or attorney portal (Exa PACS|RIS only) sign-in pages under "Organizational News." These notifications are fixed messages, and not related to email or fax notifications.



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.                                              |
| Markets                       | Select markets where the notification is available.                             |
| 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.

OFFICE -

NOTIFICATION **TASKS** EXAM AUTHORIZATION STUDY FLAG MONTHLY GOALS MACRO NOTES PORT.

ADD RELOAD

| TITLE              | DESCRIPTION                                           | COMPLETE                            | DUE DATE   |
|--------------------|-------------------------------------------------------|-------------------------------------|------------|
| Ref Phys Reminders | - Offering mammography in April<br>- New intake forms | <input checked="" type="checkbox"/> | 03/31/2023 |

2. Select ADD.

OFFICE -

NOTIFICATION **TASKS** EXAM AUTHORIZATION STUDY FLAG MONTHLY GOALS MACRO

SAVE

Title \* Ref Phys Reminders ☐ Completed

Description \* - Offering mammography in April  
- New intake forms

Due Date 03/31/2023

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.    |
| Completed   | Select when the task is completed. |

4. Select SAVE.

## Create a study flag

You can create a study flag that staff can apply to studies and orders on the worklist and schedule book. When you create a study flag, you can restrict its availability by institution, facility, modality, and other parameters. To use the study flags you create here, see [Flag an order or study](#). Study flags provide the following benefits.

- Flags help you categorize and identify studies, and you can sort the worklist by flags.
- You can use flags to trigger [routing rules](#).
- You can make worklist filters that use study flags as criteria.

To create a study flag, follow these steps.

### 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                                 |
|---------|---------------------------------------------|
| Markets | Select markets where the flag is available. |

| Setting                          | Description                                                                                                      |
|----------------------------------|------------------------------------------------------------------------------------------------------------------|
| Facilities                       | Select the facilities for which the study flag is available.                                                     |
| Modalities                       | Select the modalities for which the study flag is available.                                                     |
| 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.                                                   |

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 > MONTHLY GOALS.

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.                                           |
| Monthly Goal | Type the target number of studies to perform with the selected modality. |

| Setting                | Description                                    |
|------------------------|------------------------------------------------|
| Working Days per Month | Type the number of days in the selected month. |

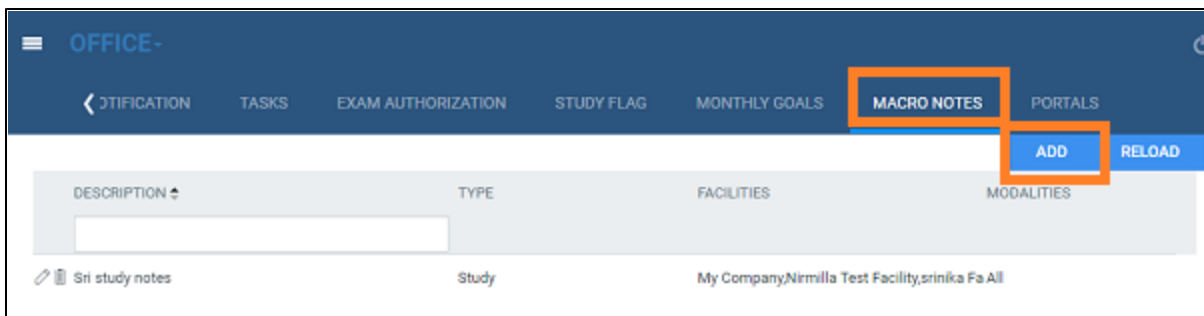
4. Select SAVE.

## 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 type of note (Study, Schedule, or Claim).                                                                            |
| Markets     | Select the markets where the macro not is available.                                                                            |

| Setting                | Description                                                                          |
|------------------------|--------------------------------------------------------------------------------------|
| Facilities             | Select the facilities where the macro note is available.                             |
| Modalities             | Select the modalities for which the macro note is available.                         |
| Edit Appointment Types | Select to add or remove the appointment types for which the macro note is available. |
| Macro Text             | Type the content of the macro note.                                                  |

4. Select SAVE.

To use your macro notes, see the following topics:

| Area                   | Topic                                                                                       |
|------------------------|---------------------------------------------------------------------------------------------|
| Edit Study screen      | <a href="#">Edit study information</a><br><a href="#">Enter notes and reasons for study</a> |
| Worklist               | <a href="#">Use the study toolbar buttons</a>                                               |
| Patient chart          | <a href="#">Edit other patient information</a>                                              |
| Technologist screen    | Use the exam screen for technologists                                                       |
| New Appointment screen |                                                                                             |

## Configure portal links

You can add up to two custom links (URLs) to the patient, provider (physician), or attorney portal (Exa PACS|RIS only). 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:<br><code>https://www.ourcompname.com/customer_payment_site</code> |

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).

[About provider organizations, and provider groups and locations](#)

[Add a provider organization](#)

[Add a provider group or location](#)

[Add a resource](#)

[Configure detailed resource settings](#)

[Merge resources](#)

[Convert or merge a system provider resource](#)

[Configure a technologist](#)

[Configure a provider pay schedule](#)

## 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.

| CODE | NAME                 | ADDRESS                  | PHONE NO. | FAX NO. | EMAIL | MARKET |
|------|----------------------|--------------------------|-----------|---------|-------|--------|
| MYOF | My Ordering Facility | 2217 US Highways 70 East |           |         |       | All    |
| OF10 | OF10                 | Addr                     |           |         |       |        |
| OF3  | OF3                  | Address                  |           |         |       |        |

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.



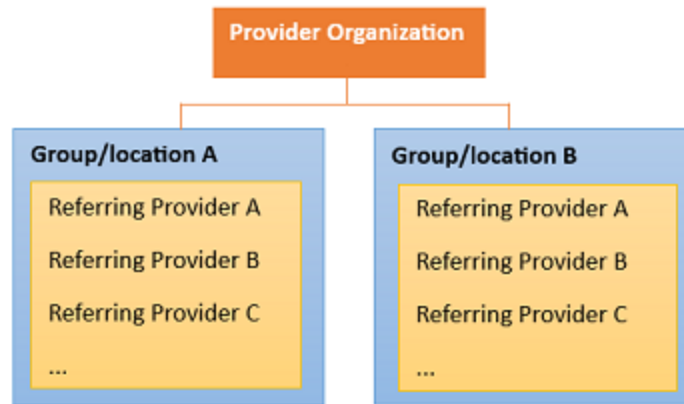
Caution: A password is configured or used on this page. For recommended security, [turn off Chrome autofill](#).

| 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        | Select 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.<br>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 Symmetry PACS 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 and attorney portals.

## 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.

The screenshot shows the "PROVIDERS & RESOURCES -" interface. The "PROVIDER ORGANIZATION" tab is selected and highlighted with an orange box. Below the tabs, there are input fields for "CODE", "PROVIDER ORGANIZATION", and "PROVIDER GROUPS". The "CODE" field contains "01". The "PROVIDER ORGANIZATION" field contains "Provider Organization Test". The "PROVIDER GROUPS" field contains "My Provider Group1,AgieTest". There are "ADD" and "RELOAD" buttons on the right. A power icon is in the top right corner.

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.

| CODE | NAME               | ADDRESS                 | PHONE NO. | FAX NO. | EMAIL |
|------|--------------------|-------------------------|-----------|---------|-------|
| ang  | AgleTestPrvGroip   | 654 west st             |           |         |       |
| MYPG | My Provider Group1 | 2217 US Highway 70 East |           |         |       |

2. Select Add.

**PROVIDERS & RESOURCES**

ORDERING FACILITY PROVIDER ORGANIZATION **PROVIDER GROUP/LOCATION** RESOURCES

Code \* MYPG

Name \* My Provider Group1

Provider Organization Select provider organization ▼

Address Line 1 \* 2217 US Highway 70 East

Address Line 2 Address Line 2

City/State/ZIP Select ZIP Code ZIP Plus

Phone No. Phone No.

Fax No. Fax No. ☐ Send Fax

Email Email

Report Password ☒ Use Company Password ☐ Custom Password

**PROVIDERS** MARKETING REP

| CODE     | NAME              | NPI NO.    | MARKETING |
|----------|-------------------|------------|-----------|
| HCP145RF | Sr, Sr            |            |           |
| RAD      | Test, Radiologist | 7778889999 |           |

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       | Select and/or 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. To configure access to the physician and attorney portals, see also [Work with Physician and Attorney Portals](#).



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.

| PROVIDERS & RESOURCES - |                      |                       |               |                            |            |          |             |                           |        |
|-------------------------|----------------------|-----------------------|---------------|----------------------------|------------|----------|-------------|---------------------------|--------|
| ORDERING FACILITY       |                      | PROVIDER ORGANIZATION |               | PROVIDER GROUP/LOCATION    |            | RESOURCE |             | PROVIDER PAY SCHEDULE     |        |
|                         |                      | MERGE                 |               | SEARCH FOR PROVIDER ON WEB |            | ADD      |             | RELOAD EXPORT IMPORT HELP |        |
| CODE                    | NAME                 | NPI#                  | MARKETING.REF | ADDRESS                    | PHONE #    | FAX #    | SPECIALIT   | RESOURCE                  | MARKET |
| 01                      | Test, Attorney       |                       |               | 2217 US Highway            | (222)222-2 |          | Attorney    |                           | ✓      |
| 02                      | Attorney, GobikaTest |                       |               | AutoTestAddress            |            |          | Attorney    |                           | ✓      |
| ang2                    | Raglin, Ang          |                       |               | 654 west st                |            |          | Referring P |                           | ✓      |

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.

|                 |                                                           |                       |                          |
|-----------------|-----------------------------------------------------------|-----------------------|--------------------------|
| Type *          | Referring Provider ▾                                      | Market                | NONE SELECTED ▾          |
| Code            | HCP12RF <input type="checkbox"/> Inactive                 | Facilities *          | 3 SELECTED ▾             |
| Name *          | Referring <input type="text"/> MI <input type="text"/>    | Specialty             | NONE SELECTED ▾          |
|                 | Provider <input type="text"/> Suffix <input type="text"/> |                       |                          |
| Title           | <input type="text"/>                                      |                       |                          |
| NPI No.         | <input type="text"/>                                      | License No.           | <input type="text"/>     |
| Taxonomy Code   | <input type="text"/>                                      | Medicare Provider No. | 100 <input type="text"/> |
| Dr. Office Name | <input type="text"/>                                      | Medicaid Provider No. | <input type="text"/>     |
| SSN             | <input type="text"/>                                      | Prov. Agreement Code  | <input type="text"/> ▾ ? |
| Federal Tax ID  | <input type="text"/>                                      | POS Type              | Select ▾                 |
| EIN No.         | <input type="text"/>                                      | Fee Schedule          | Select ▾                 |
| ETIN No.        | <input type="text"/>                                      | Max TAT               | 1 (in min)               |
| Medicare UPIN   | <input type="text"/>                                      |                       |                          |

| Setting               | Description                                                                                                                                                                                                                                                                                                                         |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type                  | Select the provider type.                                                                                                                                                                                                                                                                                                           |
| Code                  | Type your internal code for the provider.                                                                                                                                                                                                                                                                                           |
| Name                  | Type the name of the provider.                                                                                                                                                                                                                                                                                                      |
| Modality              | For technologist resources types, 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.<br><br>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.                                                                                                                                                                                                                                                                              |
| Medicare Provider No. | Type the Medicare provider number of the provider.                                                                                                                                                                                                                                                                                  |

| Setting               | Description                                                                                                                                        |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.

**Contact Information**

|                       |                                                           |                                       |                                                     |                      |
|-----------------------|-----------------------------------------------------------|---------------------------------------|-----------------------------------------------------|----------------------|
| Code *                | <input type="text"/>                                      | <input type="checkbox"/> Inactive     | Office Phone                                        | <input type="text"/> |
| Provider Organization | <input type="text" value="Select provider organization"/> |                                       | Office Fax                                          | <input type="text"/> |
| Group                 | <input type="text" value="Select provider group"/>        |                                       | Mobile No.                                          | <input type="text"/> |
| Email                 | <input type="text"/>                                      |                                       | Pager No.                                           | <input type="text"/> |
| Contact Name          | <input type="text"/>                                      |                                       | Phone No.                                           | <input type="text"/> |
| Country               | <input type="text" value="United States"/>                |                                       | Fax No.                                             | <input type="text"/> |
| Address Line 1 *      | <input type="text"/>                                      |                                       | <input checked="" type="checkbox"/> Primary Contact |                      |
| Address Line 2        | <input type="text"/>                                      |                                       |                                                     |                      |
| City/State/ZIP        | <input type="text"/>                                      | <input type="text" value="Select"/>   |                                                     |                      |
|                       | <input type="text" value="ZIP Code"/>                     | <input type="text" value="ZIP Plus"/> |                                                     |                      |
| Provider Alerts       | <input type="text"/>                                      |                                       |                                                     |                      |

| 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.<br>If the provider uses the physician or attorney 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.                                                                                                        |
| Phone No.             | Type the personal phone number of the provider.                                                                                                             |

| Setting         | Description                                            |
|-----------------|--------------------------------------------------------|
| 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.

### Reports to Me

**Contact Information \***
☒ None

☐ Email Report Link    ☐ Email Attachment  
☐ Postal Mail    ☐ Fax  
☐ Office Fax    ☐ HL7

**Reports to Group**
☐ Email Report Link    ☐ Email Attachment  
☐ Postal Mail    ☐ Fax  
☐ Office Fax    ☐ HL7

**Report Password**

☒ Use Company Password  
☐ Custom Password

**Reports to Patient Portal**
Delay  (in days)

### Image Delivery Options

☐ CD  
☐ Film  
☐ Paper

### Notification Settings

☐ Email  
☐ Receive When Added as CC Provider

| Group         | Setting                                                                                                   | Description                                                                                                                                                                                                                                                                           |
|---------------|-----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reports to Me | Contact Information<br>Email Report Link<br>Email Attachment<br>Postal Mail<br>Fax<br>Office Fax      HL7 | Select to send reports to the individual provider location/contact, and select which methods to use.<br><br>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<br>Email Report Link<br>Email Attachment<br>Postal Mail<br>Fax<br>Office Fax      HL7    | Select to send reports to all members of the provider location/contact's provider group, and select which methods to use.                                                                                                                                                             |
|               | Report Password                                                                                           | Available when Email Report Link or Email Attachment are selected.<br><br>Select to use the company password (configured in <a href="#">Password management</a> ) or to create a custom password. This is a contact-specific password to open any approved reports that they receive. |

| Group                  | Setting                            | Description                                                                                                  |
|------------------------|------------------------------------|--------------------------------------------------------------------------------------------------------------|
|                        | Reports to Patient Portal<br>Delay | Type the number of days to wait before posting reports on the patient portal.                                |
| Image Delivery Options | CD<br>Film<br>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

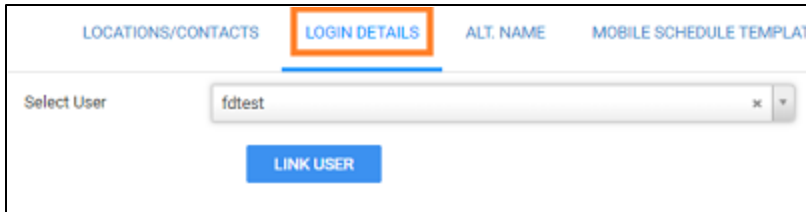
If the resource is available at multiple locations (such as physical addresses) or points of contact (such as different offices with different phone and fax numbers), you can create a new location/contact by selecting NEW CONTACT.

| CODE | CONTACT NAM GROUP | ORDERING FAC | ADDRESS 1 | PHONE # | MARKETING RE PRIMA |
|------|-------------------|--------------|-----------|---------|--------------------|
| RF24 |                   |              |           |         | Yes                |

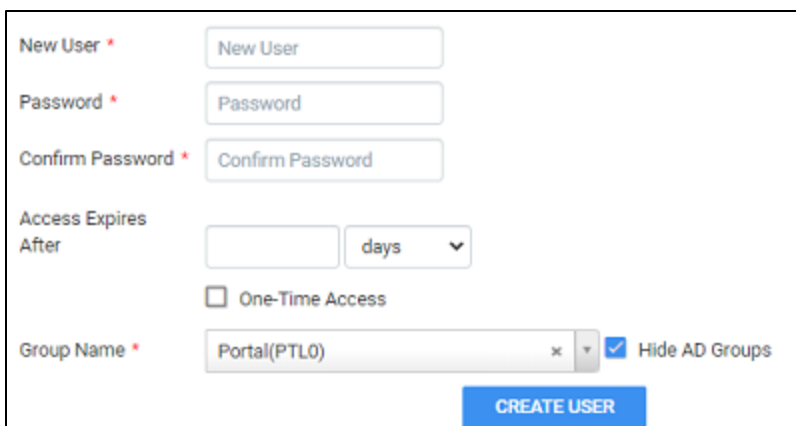
## LOGIN DETAILS

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. If you converted a system provider, the original name prior to conversion appears 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.

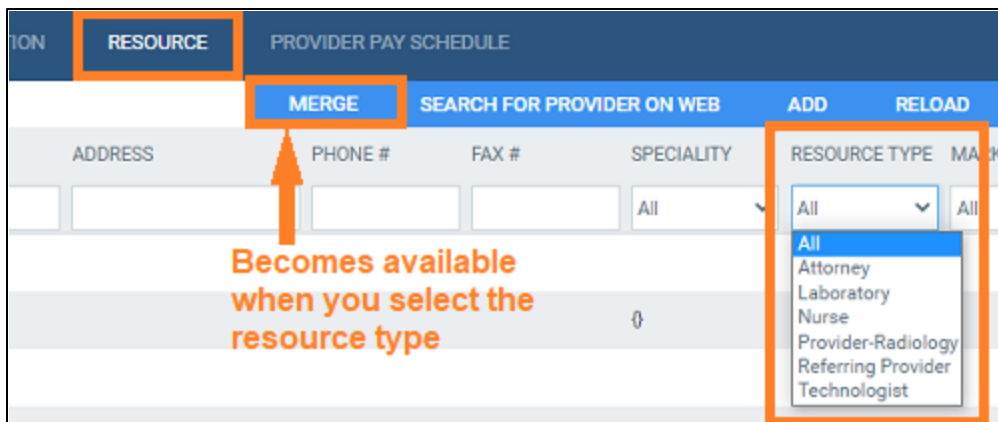
## PEER REVIEW

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

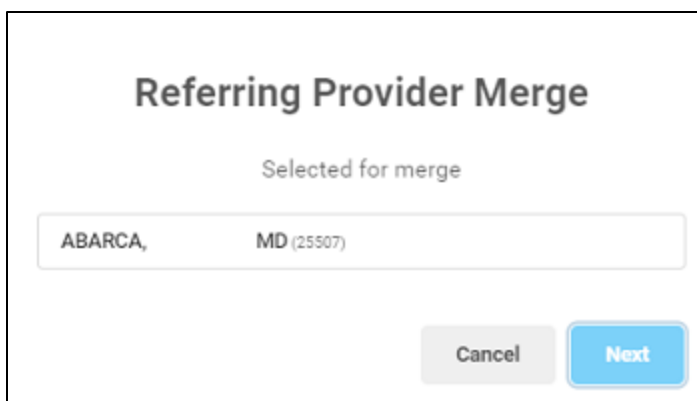
## Merge resources

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.

### Referring Provider Merge

Summary

**Source**

ABARCA, C MD (25507)

**Destination**

Abarca, (1710587019)

## Convert or merge a system provider resource

When Symmetry PACS receives a study with providers that it does not recognize (such as when spelled incorrectly), it automatically creates a *system provider* resource and associates the study with that system provider. Because system providers are not available in other parts of the program or in portals, you should convert them to usable "true" providers or merge them with existing ones.



Note: Take care when converting providers because you cannot "undo" the conversion. If you make a mistake, you can manually edit the converted resource.

### Procedure

1. Go to [SETUP](#) > [OFFICE](#) > Providers & Resources > RESOURCE.

| PROVIDERS & RESOURCES - |                      |       |                            |                 |                         |       |             |          |                       |         |
|-------------------------|----------------------|-------|----------------------------|-----------------|-------------------------|-------|-------------|----------|-----------------------|---------|
| ORDERING FACILITY       |                      |       | PROVIDER ORGANIZATION      |                 | PROVIDER GROUP/LOCATION |       | RESOURCE    |          | PROVIDER PAY SCHEDULE |         |
|                         |                      | MERGE | SEARCH FOR PROVIDER ON WEB |                 |                         | ADD   | RELOAD      | EXPORT   | IMPORT                | HELP    |
| CODE                    | NAME                 | NPI#  | MARKETING.REF              | ADDRESS         | PHONE #                 | FAX # | SPECIALIT   | RESOURCE | MARKET                | ACT SYE |
| 01                      | Test, Attorney       |       |                            | 2217 US Highway | (222)222-2              |       | Attorney    |          |                       | ✓       |
| 02                      | Attorney, GobikaTest |       |                            | AutoTestAddress |                         |       | Attorney    |          |                       | ✓       |
| ang2                    | Ragin, Ang           |       |                            | 654 west st     |                         |       | Referring P |          |                       | ✓       |

2. On the SYSTEM PROVIDER column, select Yes.

| CODE    | NAME          | NPI# | MARKETING | ADDRESS | SPECIALITY | RESOURCE | ACTIVE | SYSTEM PROVIDER |
|---------|---------------|------|-----------|---------|------------|----------|--------|-----------------|
| HCP21RF | NP, KRISTY SU |      |           |         | All        | All      | Yes    | 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.

**System provider management**

How would you like to convert the selected system providers?

4. Select SAVE.

## Configure a technologist

Technologists have access to special features including the Exam screen for technologists, and therefore require a slightly more detailed configuration than 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.

Type \* Technologist

Code HCP33TG ☐ Inactive

Name \* Testy MI Tech

Suffix

Market NONE SELECTED

Facilities \* ALL SELECTED (5)

Modality ALL SELECTED (18)

LOCATIONS/CONTACTS LOGIN DETAILS **ALLOWED APPOINTMENTS** MOBILE SCHEDULE TEMPLATES SCHEDULE RULES SUMMARY PEER REVIEW

| CODE | NAME | MODALITY | FACILITY |
|------|------|----------|----------|
|      |      |          |          |

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 then 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.

**USER MANAGEMENT -**

USERS USER ROLES **USER GROUPS** AD GROUPS AD USERS USERS ONLINE AS

**SAVE**

Group Code \*  ☐ Inactive

Group Name \*

Group Description \*

Document Types \* ☒ All Documents  
☒ ABN  
☒ ID Card  
☒ Insurance Card

**Roles**

☐ Billing  
☐ Facility Admin  
☐ Front-desk  
☐ Portal  
☐ RAD  
☐ REF  
☒ **TECH**  
☐ TRANS

**Navigation**

☐ Dashboard  
☒ Worklist  
☐ Patient Arrival Worklist  
☒ Patient  
☐ Fax Manager  
☒ Schedule  
☐ Billing  
☐ Payments

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.

The screenshot shows the 'USERS' tab with the following fields and options:

- Group Name \***: Technologist
- Name \***: Tech, MI, Test, Suffix
- Mobile Phone**: Mobile Phone
- E-Mail**: Email
- User Name \***: Test: Tech, Inactive
- Session Interval**: 20, Allow Emergency Access
- Access Expires After**: days
- One-Time Access**: ☐
- User Must Change Password Next Login**: ☐
- User can change accounting dates**: ☐
- Dragon 360**: ☐
- Market**: NONE SELECTED
- Facilities \***: ALL SELECTED (5)
- Linked Provider User Type**: Technologist (highlighted with an orange box)
- Technologist**: Tech, Test (highlighted with an orange box)

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.

The screenshot shows the 'PROVIDERS & RESOURCES' tab with the following sub-tabs: ORDERING FACILITY, PROVIDER ORGANIZATION, PROVIDER GROUP/LOCATION, RESOURCE, and PROVIDER PAY SCHEDULE (highlighted with an orange box). Below the sub-tabs is a table with the following data:

| NAME | START DATE | END DATE   |
|------|------------|------------|
| Test | 12/31/1999 | 12/31/2022 |

2. Select ADD.

Pay Schedule Name \*  ☐ Inactive

Start Date/End Date \*

Provider \*

Selected Providers

Modalities  Modality Fee

Summary

Appointment Types   Appointment Type Fee

Selected Appointment Types

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 <input type="button" value="+"/> button. You can add multiple radiologists.                                                                                                                                                          |
| Modalities/Fee        | Select one or more modalities to which to assign a fee.<br>Type the fee to charge when using the selected modality during an exam, and then select the plus <input type="button" value="+"/> 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 <input type="button" value="+"/> button. Add all appointment type/fee combinations that the provider offers.<br><br>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](#)

[Copy a transcription template](#)

[Export and import 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.

| NAME                   | START DATE | END DATE   |
|------------------------|------------|------------|
| Nirmilla Test Facility | 12/31/2022 | 01/30/2050 |

2. Select ADD.

Fee Name \*  ☐ Inactive

Start Date/End Date \*

Markets

Facilities \*

Ordering Facilities ☐ All Ordering Facilities

Modalities  Modality Fee

Summary

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.                                                                                                                                        |
| Markets             | Select markets in which the schedule applies.                                                                                                                                                  |
| 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 <input type="button" value="+"/> 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.

| NAME    | ALT. NAME |
|---------|-----------|
| Abdomen | Abdomen   |
| Ankle   | Ankle     |
| Arm     | Arm       |

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.

| CODE  | DESCRIPTION                                        | TYPE  | ACTIVE |
|-------|----------------------------------------------------|-------|--------|
| A00.0 | Cholera due to Vibrio cholerae 01, biovar cholerae | ICD10 | ✓      |
| A00.1 | Cholera due to Vibrio cholerae 01, biovar eltor    | ICD10 | ✓      |
| A00.9 | Cholera, unspecified                               | ICD10 | ✓      |

2. Select ADD.

Code \*  ☐ Inactive

Description \*

Code Type

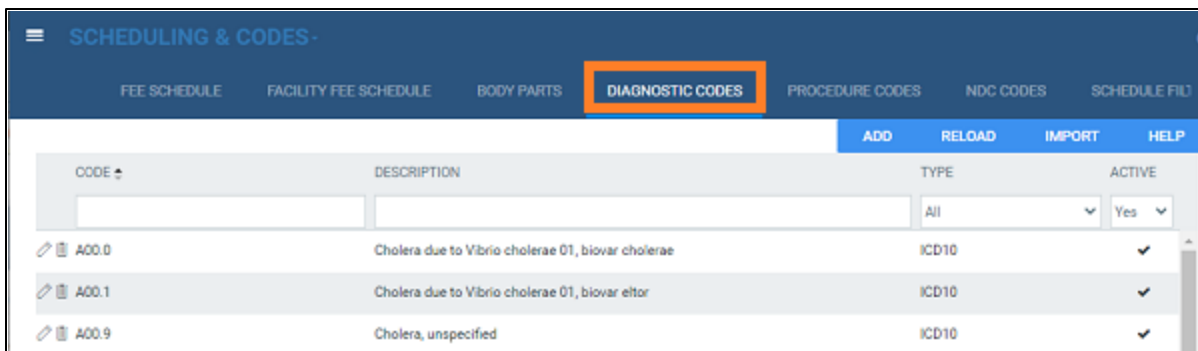
- Enter the following settings.
  - Code – Type the code to enter.
  - Description – Type the code's diagnosis description.
  - Code Type – Select the code standard to which the code belongs.
- Select SAVE.

## 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

- Go to [SETUP](#) > [OFFICE](#) > Scheduling & Codes > DIAGNOSTIC CODES.



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

- Go to [SETUP](#) > [OFFICE](#) > Scheduling & Codes > PROCEDURE CODES.

2. Select ADD.

3. Enter the following settings.

| Setting           | Description                                                                                                                         |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| Single/Empty Code | [unused]                                                                                                                            |
| Code              | Type your code for the procedure.                                                                                                   |
| Short Description | Type a short description for the procedure.                                                                                         |
| Description       | Type a full description of the procedure.                                                                                           |
| Markets           | Select markets in which the procedure is available.                                                                                 |
| Facilities        | Select one or more facilities that perform the procedure.                                                                           |
| Modalities        | Select modalities used for the procedure.                                                                                           |
| Service Type      | Select the service type to which the procedure belongs.                                                                             |
| Ref. Code         | Type the reference code of the procedure. In most cases this can be the CPT or LOINC code.                                          |
| NDC Code          | Type the national drug code associated with the procedure, if any. For a more advanced NDC function, see later steps in this topic. |

| Setting     | Description                                                                                        |
|-------------|----------------------------------------------------------------------------------------------------|
| NDC Measure | Type the unit of measure for contrast and/or liquid medications. The value for this is usually UN. |
| 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.                                                            |

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.

| CODE  | DESCRIPTION         | EXAM PREP INSTRUCT | GLOBAL FE | DURATION | FACILITY                               | MODALITY | MODIFIERS | SERVICE TYPE | RVU |
|-------|---------------------|--------------------|-----------|----------|----------------------------------------|----------|-----------|--------------|-----|
| 0001A | IMM ADMN SARSCOV2   | 0                  | 15        |          | srinika Facility 1,Angie Fac undefined |          |           |              |     |
| 0001F | HRT FAILURE ASSESSE | 0                  | 15        |          | srinika Facility 1,Angie Fac           |          |           |              |     |
| 0002A | IMM ADMN SARSCOV2   | 0                  | 15        |          | srinika Facility 1,Angie Fac undefined |          |           |              |     |

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.

| CODE  | DESCRIPTION         | EXAM PREP INSTRUCT | GLOBAL FE | DURATION | FACILITY                               | MODALITY | MODIFIERS | SERVICE TYPE | RVU |
|-------|---------------------|--------------------|-----------|----------|----------------------------------------|----------|-----------|--------------|-----|
| 0001A | IMM ADMN SARSCOV2   | 0                  | 15        |          | srinika Facility 1,Angie Fac undefined |          |           |              |     |
| 0001F | HRT FAILURE ASSESSE | 0                  | 15        |          | srinika Facility 1,Angie Fac           |          |           |              |     |
| 0002A | IMM ADMN SARSCOV2   | 0                  | 15        |          | srinika Facility 1,Angie Fac undefined |          |           |              |     |

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.

## Find a schedule rule and view details

You can filter the list of schedule rules to find ones that satisfy selected criteria, and quickly view details about the rule.

1. Go to [SETUP](#) > [OFFICE](#) > Scheduling & Codes > SCHEDULE TEMPLATES.
2. Under Schedule Rules, type or select search criteria (such as Facility and/or Modality) and press ENTER.

**SCHEDULING & CODES**

SCHEDULE FILTER   STUDY STATUS   TRANSCRIPTION TEMPLATE   REPORT TEMPLATE   FUNCTIONAL STATUS   COGNITIVE STATUS

Template Name:  ☐ Show Inactive

**Schedule Rules**

|  | RULE NAME                | FACILITY               | MODALITY | MODALITY ROOM   | REPEATING RULE DATE     | DATE/TIME RULE DATE | RESOURCE |
|--|--------------------------|------------------------|----------|-----------------|-------------------------|---------------------|----------|
|  | Machine Maintenance Rule | Auto Pinal Facility1   | MR       | Pinal MR Room   | 07/09/2024 - 07/10/2024 |                     |          |
|  | DurationSpecRule         | Auto Suffolk Facility1 | CT       | Suffolk CT Room | 07/10/2024 - 07/29/2024 |                     |          |
|  | Exclusion Rule2          | Auto Suffolk Facility1 | CT       | Suffolk CT Room | 07/10/2024              |                     |          |

Result: Schedule rules matching your criteria appear in the list.



When searching by repeating rule date:

- The program returns repeating rules having at least one date, from its Start Date to End Date, that falls within your criterion date range—even if the repeating criteria of the rule would cause it to be excluded from the criterion date range.
- If you enter only a single date, the program searches for that date and all dates thereafter.

When searching by date/time rule date:

- The program returns date/time rules and automatically generated auto-blocks having at least one date, from its Start Date to End Date, that falls within the criterion date range—regardless of whether the rule has one or multiple occurrences.

3. To view details about a rule, select its Expand Panel button.

| Schedule Rule Summary                                                                       |                            |
|---------------------------------------------------------------------------------------------|----------------------------|
| Template Name                                                                               | Suffolk Template           |
| Rule Name                                                                                   | DurationSpecRule           |
| Modality Rooms                                                                              | Suffolk CT Room(CTSKF)     |
| Appointment Types                                                                           | CT CRV SPI C+ MATRL(72126) |
| Resource                                                                                    |                            |
| Display Block                                                                               | ✓                          |
| Ignore Rule in Schedule                                                                     |                            |
| Engine                                                                                      | ✗                          |
| Type                                                                                        | Repeating                  |
| Available                                                                                   | ✗                          |
| Repeats Daily:                                                                              |                            |
| Not available every day from 8:00 AM to 8:30 AM beginning 07/10/2024 and ending 07/29/2024. |                            |

Result: The Schedule Rule Summary panel appears.

4. To close the panel, click anywhere outside of the panel.

See also:

Configure a schedule template and schedule rules

## 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.

**SCHEDULING & CODES -**

◀ URE CODES   NDC CODES   SCHEDULE FILTER   **STUDY STATUS**   TRAN

**STUDY STATUS**   STUDY FLOW

Facility \*   My Company   Search   ADD

|               |       |
|---------------|-------|
| ORD/Ordered   | Order |
| PR/Precheckin | Order |
| SCH/Scheduled | Order |
| CON/Confirmed | Order |
| CHI/Check-In  | Order |

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

- 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, and the study is added to the Exceeds maximum time limit filter.   |
| 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 <a href="#">Add a resource</a> ). |

- 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 configure these flows, and 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 facility in the dropdown on the left, and destination facilities in the dropdown on the right (see figure), and then selecting COPY.



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

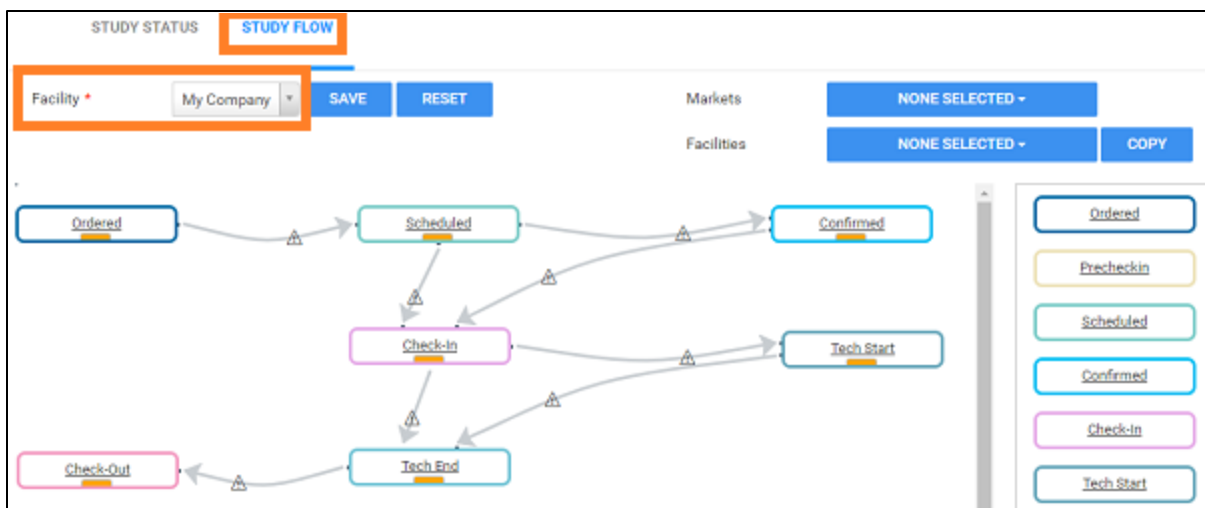


Caution:

- 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.

The screenshot shows the 'TRANSCRIPTION TEMPLATE' page. At the top, there's a navigation bar with 'TRANSCRIPTION TEMPLATE' highlighted. Below it, there are filters for 'Modality' (NONE SELECTED), 'User' (Search User), 'Appointment Type' (Search Appointment Type), and 'Study Description'. A table lists templates with columns for 'TEMPLATE NAME', 'GLOBAL', and 'ACTIVE'. Two templates are shown: 'HL7 Sample Template' and 'XRAY HAND'. The 'XRAY HAND' template is selected. To the right of the table, there's a message: 'Select [pencil icon] to view/edit template options or [plus icon] to launch the full template editor.' The 'ADD' button is highlighted in the top right corner.

2. Select ADD.

The screenshot displays the Symmetry PACS 34.1.2 User's Manual interface for configuring a template. The left pane contains the following settings:

- Template Name:** XRAY HAND
- Macro Keyword:** (empty)
- Modalities:** 2 SELECTED -
- User:** Search User
- Require All Match:** ☐
- Markets:** NONE SELECTED -
- Facilities:** NONE SELECTED -
- Institution:** (empty)
- Appointment Types:** (empty)

The right pane shows a preview of the template content, which includes the following fields:

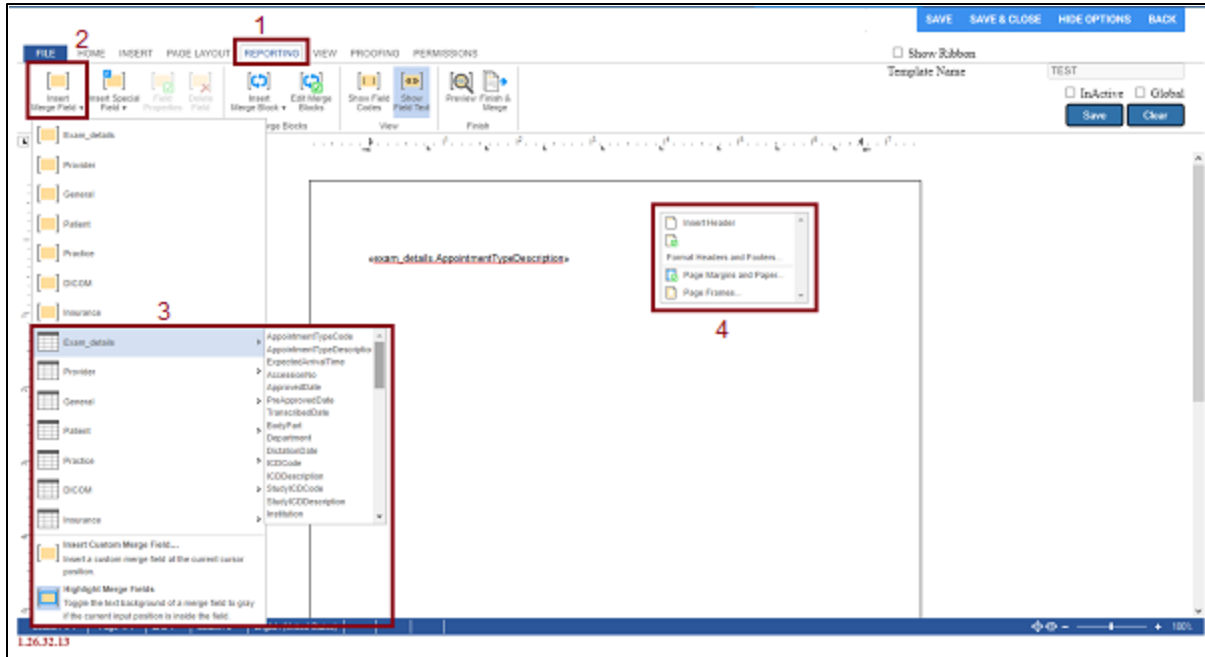
- Exam:** RADIOGRAPH OF THE \_\_ HAND
- Technique:** PA, oblique and lateral views of the \_\_ hand are submitted.
- Clinical Data:** Pain
- Prior Studies:** (empty)
- Findings:** There is regional osteopenia. Scattered moderate degenerative changes with joint space narrowing sclerosis and spurring present. Early erosive changes PIP and DIP joint levels, and first carpal-metacarpal joint. Correlate with erosive osteoarthritis. Ossified/calcified density along the base of the first metacarpal may reflect soft tissue changes associated with previous trauma. Soft tissues are unremarkable. No distinct acute fracture or other acute osseous abnormality.
- Impression:** (empty)
- Recommendation:** (empty)

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

| Setting           | Description                                                                                                                                                                                                                                                           |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Template Name     | Type a name for the template.                                                                                                                                                                                                                                         |
| Macro Keyword     | Available when dictation is made available by KM staff.<br>Type a macro keyword that can be voice-recognized to open a template.<br>Tip: Add a starter word in front of the keyword to make it easier to call up macros/templates.<br>Example: macro chest            |
| Global            | Select to make the template available to all users.                                                                                                                                                                                                                   |
| Modalities        | Select for which modalities the template is available.                                                                                                                                                                                                                |
| 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. |
| Require All Match | The template is only available to users and studies who match all criteria you enter here.                                                                                                                                                                            |
| Markets           | Select in which markets the template is available.                                                                                                                                                                                                                    |
| Facilities        | Select for which facilities the template is available.                                                                                                                                                                                                                |
| Institution       | Select for which institution the template is available.                                                                                                                                                                                                               |
| Appointment Types | Select for which appointment types (CPT codes) 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.                                                                                                                                                                                 |

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.

See also:

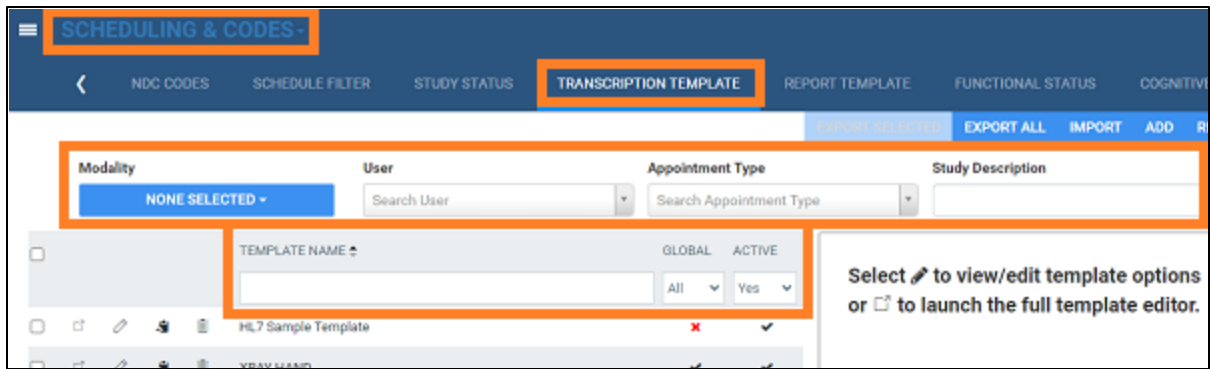
[Find and edit a transcription template](#)  
[Export and import a transcription template](#)  
[Copy a transcription template](#)  
[Merge fields](#)

## Find and edit a transcription template

You can search for a transcription template by a variety of criteria, edit template settings "on the fly," or edit template contents by opening it in the main template editing screen.

### Procedure

1. Go to [SETUP](#) > [OFFICE](#) > Scheduling & Codes > TRANSCRIPTION TEMPLATE.



2. Type or select search criteria in the following fields.

| Criterion         | Description                                                                             |
|-------------------|-----------------------------------------------------------------------------------------|
| Modality          | Select modalities to which the template is assigned.                                    |
| User              | Select a user to whom the template is assigned.                                         |
| Appointment Type  | Select an appointment type to which the template is assigned.                           |
| Study Description | Type a sequence of letters included in the study description of the template.           |
| Template Name     | Type two or more characters included in the name of the template, and then press Enter. |
| Global            | Select whether or not the template is global.                                           |
| Active            | Select whether the template is active.                                                  |

3. In the row of the template to edit, select the edit  button.



4. In the editing pane, to edit template settings, select the EDIT button.

**Template Name \***  
XRAY HAND

☐ Inactive ☒ Global

**Modalities \***  
2 SELECTED -

**User**  
Search User  
+

☐ Require All Match

**Markets**  
NONE SELECTED -

**Facilities**  
NONE SELECTED -

**Institution**  
+

**Appointment Types**  
Search Appointment Types  
+

**Body Part**  
NONE SELECTED -

**Study Description**  
+

HANDY X

EDIT

5. Edit settings as needed, and then select SAVE.

6. To edit the contents of the template, select the  button to open it in the main template editor.

See also:

[Add a transcription template](#)

[Export and import a transcription template](#)

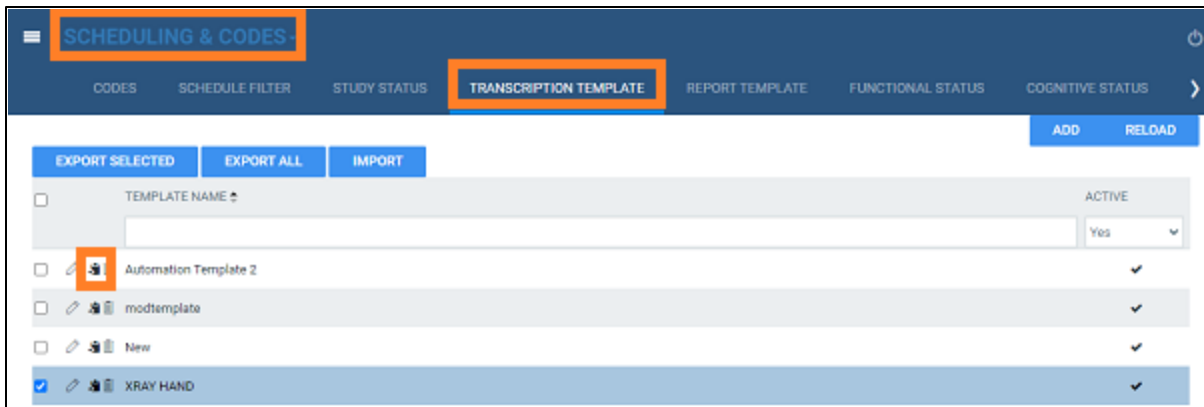
[Copy a transcription template](#)

## Copy a transcription template

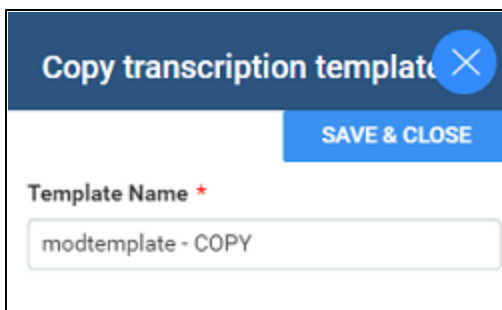
To make a transcription template that is similar to an existing one, you can copy the existing one and modify it:

Procedure

1. Go to [SETUP](#) > [OFFICE](#) > Scheduling & Codes > TRANSCRIPTION TEMPLATE.



- To copy a template, select the copy  button in the row containing the template you want to copy.



- In the Copy Transcription Template dialog, type a new name for the template, and then click SAVE & CLOSE.
- Open the template and modify it as needed.

See also:

[Add a transcription template](#)

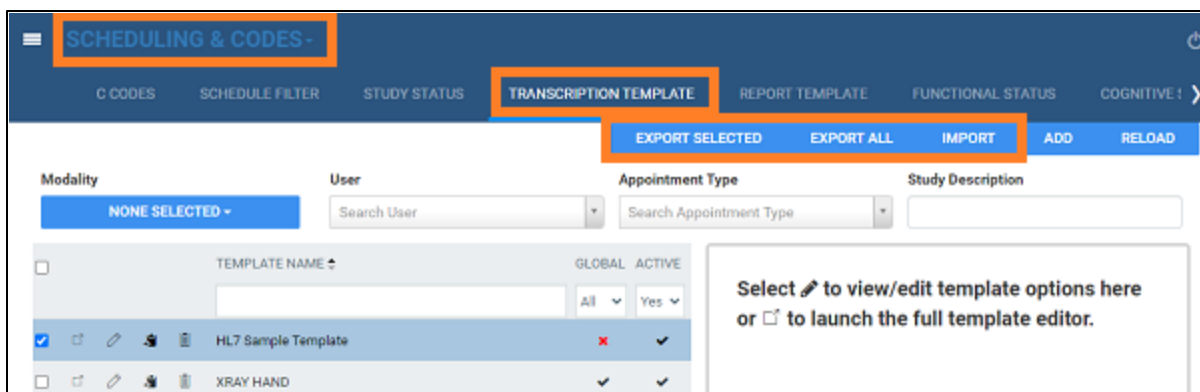
[Export and import a transcription template](#)

## Export and import a transcription template

If you transcribe studies at different Exa platform sites, you can save time by exporting any transcription templates that you created in Symmetry PACS at one site and importing them at the others. It's also a good idea to export your templates for backup purposes.

### Export a template

- Go to [SETUP](#) > [OFFICE](#) > Scheduling & Codes > TRANSCRIPTION TEMPLATE.



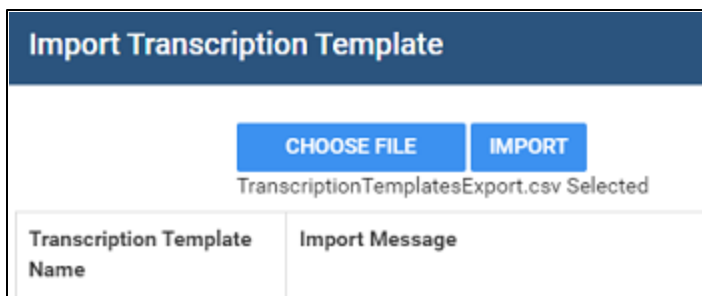
- Optional: To filter the list by template status, use the ACTIVE dropdown list.
- Select one or more templates to export, and then select EXPORT SELECTED. Or, to export all templates, select EXPORT ALL.

Result: Symmetry PACS downloads a CSV file of your templates to your windows downloads folder.

- Use email or other means to send a copy of the template file to the site where you want to import the file.

### Import a template

- At the site to perform the import, place the CSV template files in a folder of your choice.
- Open the screen above and select IMPORT.
- In the Import Transcription Template dialog, select CHOOSE FILE, and then browse for and select the CSV files.



- Select IMPORT.

See also:

[Add a transcription template](#)

[Copy a transcription template](#)

[Dictation and transcription with Exa Voice and Exa Trans](#)

## 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.

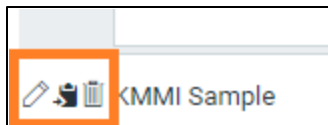
### Add a report template

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.

The screenshot shows the 'SCHEDULING & CODES' interface. The 'REPORT TEMPLATE' tab is selected. An 'ADD' button is highlighted in the top right. Below the tabs, there are input fields for 'TEMPLATE NAME', 'SUMMARY', 'FACILITY', 'MARKET', 'START DATE', and 'END DATE'. A table below these fields lists existing templates. The first entry, 'KMMI Sample', has a copy icon highlighted with an orange box.

2. Do one of the following.
  - To start a new template from scratch, select ADD.
  - 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.



The screenshot shows the 'Template Name' configuration page. It includes fields for 'Template Name', 'Markets', 'Facilities', 'Modalities', 'Summary', 'Addendum Location' (with radio buttons for 'Top' and 'Bottom'), 'Study Description', 'Institution', 'Start Date', and 'End Date'. The 'Inactive' checkbox is checked.

3. Enter the following settings.

| Setting       | Description                   |
|---------------|-------------------------------|
| Template Name | Type a name for the template. |

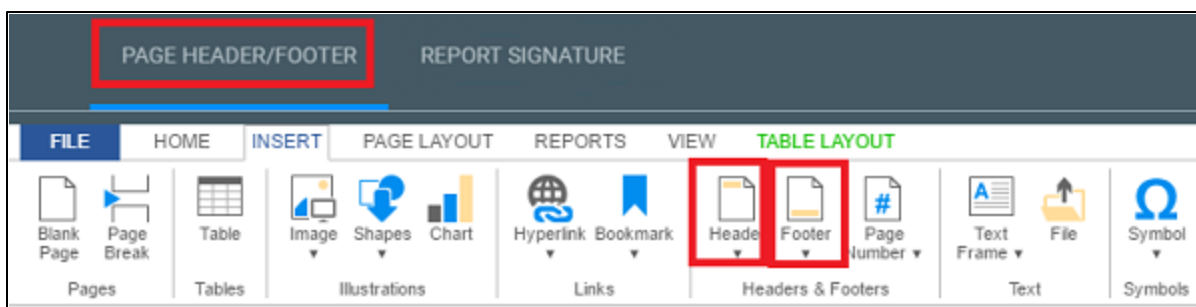
| Setting           | Description                                                                                                                                                              |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.                                                                                                                             |
| Modality          | Select all modalities to which the template can apply.                                                                                                                   |
| Summary           | Type explanatory information about the template.                                                                                                                         |
| Addendum Location | Top: Select to place addenda before the original report (top of the first page).<br>Bottom: Select to place addenda after the original report (bottom of the last page). |
| Study Description | Type study descriptions for the templates to be applied. For example, US Abdomen could have a different template than MRI Abdomen.                                       |
| Institution       | Select institutions that use the template.                                                                                                                               |
| Start/End Date    | Select a range of study dates for which to use the template (to apply it to reports). The end date is optional.                                                          |

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.

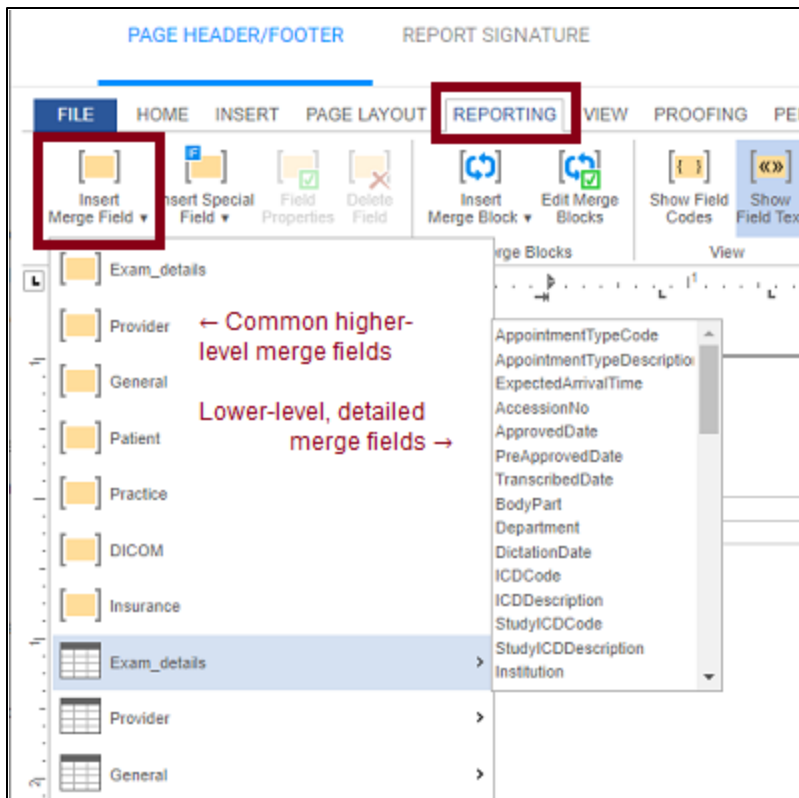


Note: It may be helpful to add carriage returns to make room for the logo.

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 (left, right, center) tools, or drag the image to position it.
8. Select Save.

### Add merge fields

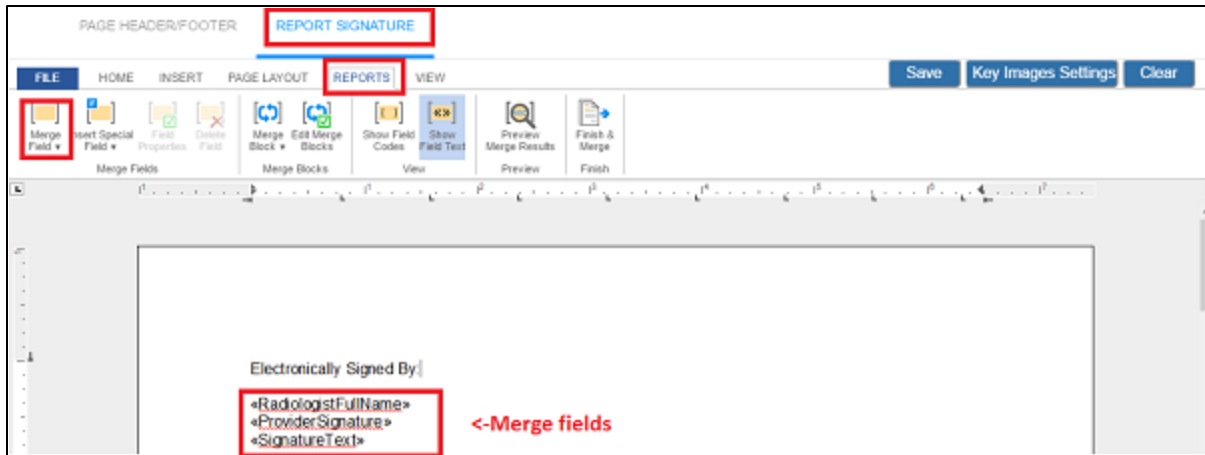
1. Place the cursor in the header or footer where you want to add the merge field.
2. On the REPORTING tab, select Insert Merge Field.



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

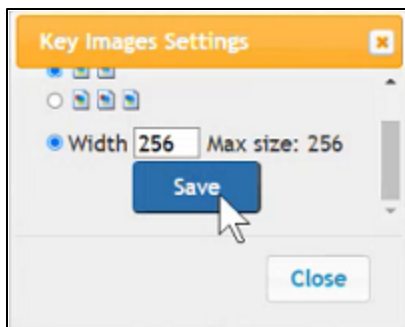
1. Select the REPORT SIGNATURE sub-tab.
2. Type text and add merge fields as described earlier.



3. Optional: To include key images in the signature area, see "Add key images" below.

### Add key images

1. Select Merge Field > DICOM, and add the <<keyimages>> merge field.
2. Select Key Image Settings, and then select the number of key images to add.



3. Optional: To shrink the image, type a new width and select the Width option.
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.

The screenshot displays the 'SCHEDULING & CODES' interface. At the top, there is a navigation bar with a hamburger menu icon and the title 'SCHEDULING & CODES'. Below this, a secondary navigation bar contains several tabs: '< REPORT TEMPLATE', 'FUNCTIONAL STATUS', 'COGNITIVE STATUS', 'SCHEDULE TEMPLATES', and 'API'. The 'FUNCTIONAL STATUS' and 'COGNITIVE STATUS' tabs are highlighted with orange borders. The main content area below the tabs shows a table with a header 'DESCRIPTION'. The table contains two rows: 'Ambulatory' and 'Cane/walker'. Each row has a pencil icon for editing and a trash can icon for deletion. At the bottom of the interface, there is a 'Description \*' label, an empty text input field, and two buttons labeled 'SAVE' and 'CANCEL'.

| DESCRIPTION |             |
|-------------|-------------|
|             | Ambulatory  |
|             | Cane/walker |

Description \*

SAVE CANCEL

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](#)

[Configure a DICOM printer](#)

[Configure a file store](#)

[Configure routing rules](#)

[Configure AE scripts](#)

[Understanding receiver rules](#)

[Configure a receiver rule](#)

[Configure matching rules](#)

[Configure hanging protocols](#)

[Manage jobs in the transfer and SR queues](#)

[Configure an issuer of a PID](#)

## 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.

| TITLE       | HOST          | PORT  | DESCRIPTION | FILE STORE        | AE TYPE                 |
|-------------|---------------|-------|-------------|-------------------|-------------------------|
| EXA-V32-V32 | 10.227.26.76  | 33336 | EXA-V32-V32 | Exa Server Images | SEND,RECEIVE,QUERY/RETR |
| OLD_ARCHIVE |               |       | OLD_ARCHIVE | DEFAULT STORE     | RECEIVE                 |
| OPAL_32_33  | 10.227.26.100 | 33336 | OPAL_32_33  | Exa Server Images | SEND,RECEIVE,QUERY/RETR |

2. Select ADD.

- 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 send only DICOM studies (not subsequently attached scanned, non-DICOM documents) to the AE when a DICOM-send occurs.<br>Clear to include scanned documents, and to choose which documents are sent.                           |
| Document Types                   | Available when Ignore Scan Docs (Send) is cleared. Select the documents that you want to send when a DICOM-send occurs.                                                                                                                 |
| Send Scanned Documents as Images | Available when Ignore Scan Docs (Send) is cleared.<br>Select: Send scanned documents as DICOM images<br>Clear: Send scanned documents as Encapsulated PDFs.                                                                             |
| 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). |
| 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.                                                                                                                                                                    |

| Setting                           | Description                                                                                                                                                                                                                                                                                                                      |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 Markets                      | Select markets to "group select" facilities in the Send Facilities dropdown list.                                                                                                                                                                                                                                                |
| 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).                                                                                                                                                                             |
| Send Annotations as               | Select how to process annotations for sending.<br><br>Burned in: "Flattens" the image and overlay into a single image.<br><br>DICOM Overlay: Converts the annotations to a DICOM overlay and sends along with the study.<br><br>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).                                                                                                                                                                                                                                          |
| Ignore Inbound Stat Value         | Select to keep the Stat level of the study from Symmetry PACS.<br><br>Clear to use the Stat level of the study as received.                                                                                                                                                                                                      |
| 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.<br>DICOM: C-MOVE<br>DICOM SSL: C-MOVE, secured<br>HL7: Standard HL7 protocols.<br>OPAL: The Opal Transfer service.                                                                                                                                                  |
| Requires TLS<br>Requires Cert     | Select for encrypted transmission through the DICOM TLS and MTLS protocols. Used only if supported by the server with which Symmetry PACS is transacting.<br><br>Select to require a certificate when using DICOM TLS.                                                                                                           |
| 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.

### Extra Printer Options

|               |                      |                |                                |
|---------------|----------------------|----------------|--------------------------------|
| ARTIM Timeout | <input type="text"/> | Max PDU Length | <input type="text"/>           |
| Read Timeout  | <input type="text"/> | Border Margins | <input type="text" value="2"/> |
| Write Timeout | <input type="text"/> | True Size      | <input type="text"/>           |

### Printer Configurations

REFRESH ADD CONFIGURATION

| Name | Medium | Film Size | Border Density | destination | orientation | Magnification | Empty Density | Memory Allocation |
|------|--------|-----------|----------------|-------------|-------------|---------------|---------------|-------------------|
| Prn1 | PAPER  | BINX 10IN | BLACK          | MAGAZINE    | PORTRAIT    | REPLICATE     | BLACK         | Auto              |

| 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      | Prints images in their true resolution. 1UP mode only.                                                                  |

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.

See also:

[DICOM-print a study](#)

## Configure a file store

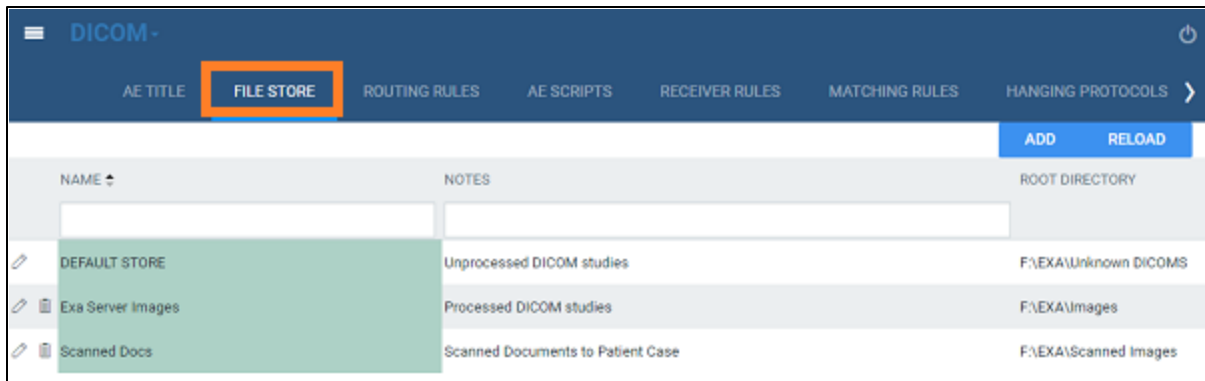
*File stores* are directories on servers that Symmetry PACS uses to store files received in a DICOM transaction, such as images from a modality.



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. In the Type dropdown list, select the type.
  - Local – The standard type, for storing files locally.
  - AWS HealthImaging – Select if using Amazon Web Services for your file store. This type is only available for C-STORE and C-MOVE actions.
4. Type the server name, root directory, and notes.
  - a. For the Local type, select SAVE. The procedure is complete.
  - b. For AHI type, continue to the next step.
5. Enter AHI settings as follows.

DICOM-

AE TITLE

FILE STORE

ROUTING RULES

AE SCRIPTS

RECEIVER RULES

MATCHING RULES

HANGING

General Section

Type \*

AWS HealthImaging

File Store Name \*

AHI

Root Directory \*

Notes

AWS Account

Account ID \*

Access Key ID \*

Secret Key ID \*

Region \*

Reconciliation Options

Merge Image Sets

Mode of merging

Enable Force flag

Conflicts action

AWS HealthImaging

Data Store ID \*

AWS HealthImaging - DICOM Import Job

Data Access Role

ARN \*

Input S3 URI \*

Output S3 URI \*

6. Select **SAVE**.

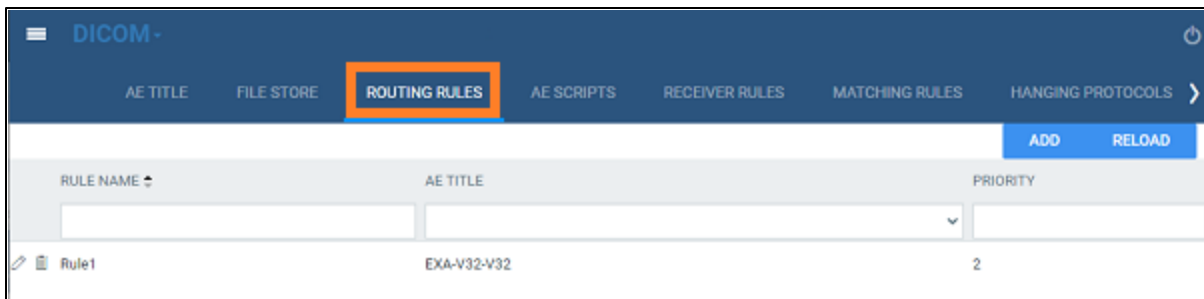
## Configure routing rules

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.

Rule Name \*  ☐ Inactive

Type \*  Priority \*

AE Title \*  Attempts \*

**Prior Options**

Number of Priors to Send

☒ Auto Send Priors

☐ Relevant Priors

☐ Force Relevant Only

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<br>PRINT<br>QUERY/RETRIEVE<br>Send Report (Opal)<br>LOCAL_CACHE             | Select the AE with which to perform the transaction (for example, select Remote_Hospital to send to that AE).                                                                                                           |
| Priority               | SEND<br>PRINT<br>QUERY/RETRIEVE<br>Send Report (Opal)<br>HL7 Send<br>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. |

| Setting                  | Type                                                                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Attempts                 | SEND<br>PRINT<br>QUERY/RETRIEVE<br>Send Report (Opal)<br>HL7 Send<br>LOCAL_CACHE | Type the number of attempts the program should make to apply the rule (e.g. to send the study).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Priors                   | QUERY/RETRIEVE                                                                   | Type the number of priors to retrieve. Type 0 (zero) to retrieve instances for the current study only.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Modality                 | QUERY/RETRIEVE                                                                   | Select an option to filter which priors to retrieve.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Prior Options            |                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Number of Priors to Send | SEND<br>LOCAL_CACHE                                                              | Type the number of priors to send along with the study.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Auto Send Priors         | SEND<br>LOCAL_CACHE                                                              | Select to send any priors found in the system along with the current study. <ul style="list-style-type: none"> <li>The system sends as many priors as it can find, up to the Number of Priors to Send.</li> <li>The system sends the most recent priors first.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                          |
| Relevant Priors          | SEND<br>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). <ul style="list-style-type: none"> <li>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.</li> <li>The system sends as many relevant priors as it can find, up to the Numbers of Priors to Send.</li> <li>If the system finds fewer relevant priors than the Number of Priors to Send, it adds non-relevant priors up to the number.</li> </ul> |
| Force Relevant Only      | SEND<br>LOCAL_CACHE                                                              | Select to send only relevant priors. <ul style="list-style-type: none"> <li>If the system finds fewer relevant priors than the Number of Priors to Send, it does not send any additional priors.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| [Define relevant priors] | SEND<br>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*, meaning, "Modality Is 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) |                                    |  |
| <input type="text"/> | <input type="text"/> | <input type="text"/>      | <input type="text"/> | <input type="text"/> | <input type="text"/>      | <input type="button" value="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            | Select a transaction and node. The script runs when Exa makes the selected transaction with the selected node. |
| AE Title           |                                                                                                                |
| All                | Select all AEs of the selected AE Type.                                                                        |
| Script Description | Type a description of the script.                                                                              |
| 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.

| PRIORITY                                                                                                                                          | RULE NAME   |                                                                                                                                                                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                   |             | <input type="text"/> <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="up"/> <input type="button" value="down"/> 12 Kforwarder7 |
|                                                                                                                                                   |             | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="up"/> <input type="button" value="down"/> 13 Kforwarder8                      |
| <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="up"/> <input type="button" value="down"/> 1 | PMT2        | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="up"/> <input type="button" value="down"/> 14 MMD Live                         |
| <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="up"/> <input type="button" value="down"/> 2 | PMT         | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="up"/> <input type="button" value="down"/> 15 <b>DEFAULT RULE</b>              |
| <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="up"/> <input type="button" value="down"/> 3 | File Import |                                                                                                                                                                                     |

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.

### Rule info and Filter

Rule Name \*  ☐ Inactive

AE Title

Facility

Modality

Institution

Status

Interval (Sec) \*

Trigger RoutingRules ☐

### 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.

#### Applied Rules

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

Figure: Applied rules in the PACS ONLY preset.

Symmetry PACS compares the items in the green boxes from the incoming study against PACS, RIS, or both, depending on the reconciliation mode (the first bullet item in the figure). The items under Patient (such as “Last name” in the figure) and Study (“Study UID”) must match a patient in PACS and/or a RIS order. Symmetry PACS stores the result of the match (success or failure) in this step, and then evaluation continues to step 3 or 4.

### Step 3 – Process successes

If matching succeeded, Symmetry PACS waits the number of seconds specified in the Interval setting from step 1, moves the study from the QC tab to the ALL STUDIES tab (the study “goes live”), and assigns to the study the status selected in the Status dropdown list from step 1. At the same time, it performs the actions and applies the options in the blue box in the following figure.

#### Applied Rules

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

## Step 4 – Process failures

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

### Applied Rules

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

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

Move Anyway (Even in exception)

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

Patient: Move to live when there is no-match

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

Study: Move to live when there is no-match

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



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

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  |                                                                                                                                                                                                                                                     |

| Setting                            | Description                                                                                                                |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| Institution                        |                                                                                                                            |
| Status                             | Select the status to assign the study if it matches the rule.                                                              |
| Interval                           | Select a number of seconds to wait before moving the study from the QC tab to the ALL STUDIES tab (go live).               |
| Trigger Routing Rules              | Select to force evaluation of matching studies against routing rules.                                                      |
| Issuer of Alternate Account Number | Select to make alternate account numbers available. See <a href="#">Add alternate account numbers to a patient chart</a> . |

- 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.      |

- Select SAVE.

See also:

[Understanding receiver rules](#)

## Configure matching rules

See [Work with Display Management](#).

## Configure hanging protocols

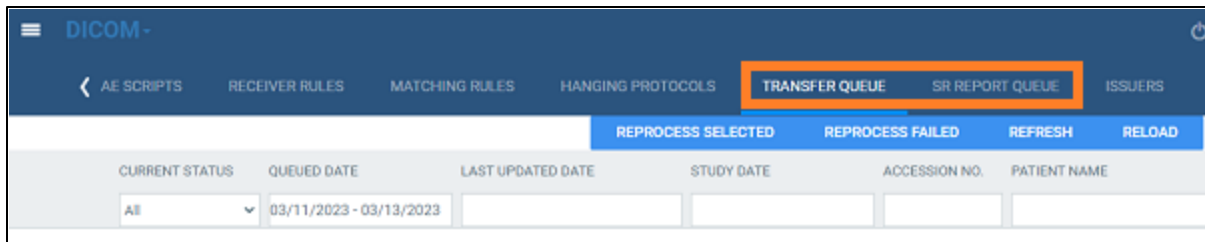
See [Work with Display Management](#).

## 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

- 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 Canceled, 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 Symmetry PACS 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](#)

[Create a user group](#)

[Create a user](#)

[Manage a user's third-party apps](#)

[Copy settings from one user to another](#)

[Reset a user's password as an administrator](#)

[Configure an administered worklist filter](#)

[Manage who is online](#)

[View assigned studies and patients](#)

## 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 then 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.

**Role Name \***  ☐ Inactive

**Role Description \***

**User Role Permission**

|                                                                |                                                   |
|----------------------------------------------------------------|---------------------------------------------------|
| <input type="checkbox"/> Billing/Setup                         | <input type="checkbox"/> Order ICD                |
| <input checked="" type="checkbox"/> Billing Codes              | <input type="checkbox"/> Order Referring Provider |
| <input checked="" type="checkbox"/> Billing Class              | <input type="checkbox"/> Order Studies            |
| <input checked="" type="checkbox"/> Claim Status               | <input type="checkbox"/> QC Delete                |
| <input checked="" type="checkbox"/> CAS Group Code             | <input type="checkbox"/> QC Edit                  |
| <input checked="" type="checkbox"/> Provider ID Code Qualifier | <input type="checkbox"/> QC Move to Studies       |

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.

**USER MANAGEMENT**

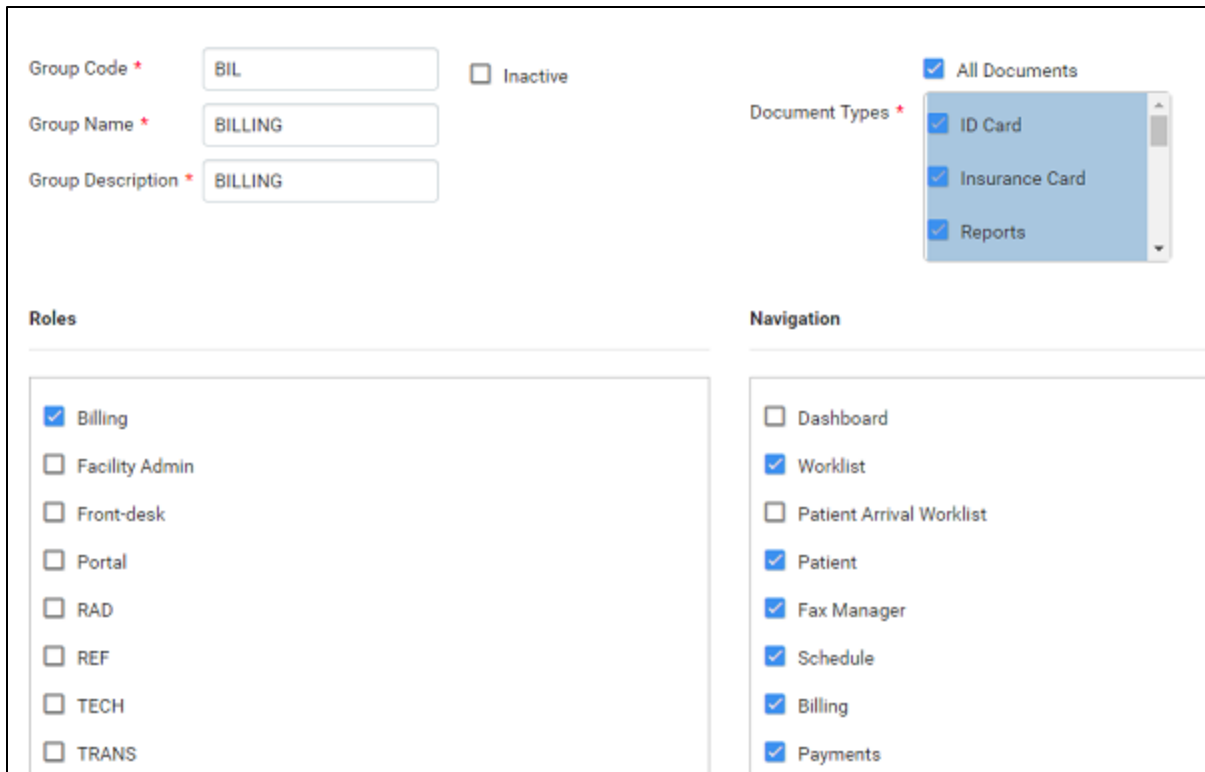
USERS USER ROLES **USER GROUPS** AD GROUPS AD USERS USERS ONLINE ASSIGNED STUDIES ASSIGNED >

☐ Show Inactive

**ADD** **RELOAD**

| GROUP CODE | GROUP NAME     | GROUP DESCRIPTION      |
|------------|----------------|------------------------|
| BIL        | BILLING        | BILLING                |
| FAD        | Facility Admin | Facility Administrator |
| FRDE       | Front-desk     | Front desk personnel   |

2. Select ADD.



Group Code \*  ☐ Inactive

Group Name \*

Group Description \*

Document Types \* ☒ All Documents  
☒ ID Card  
☒ Insurance Card  
☒ Reports

**Roles**

- ☒ Billing
- ☐ Facility Admin
- ☐ Front-desk
- ☐ Portal
- ☐ RAD
- ☐ REF
- ☐ TECH
- ☐ TRANS

**Navigation**

- ☐ Dashboard
- ☒ Worklist
- ☐ Patient Arrival Worklist
- ☒ Patient
- ☒ Fax Manager
- ☒ Schedule
- ☒ Billing
- ☒ Payments

3. Enter the following settings.

| Setting           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Group Code        | Type your internal code for the group. For example, RAD.<br>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.<br>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.<br><br>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).<br><br>Note: <ul style="list-style-type: none"> <li>This only allows opening the item, and certain user rights may be required to work in a particular area.</li> <li>Even if selected here, the Fax Manager requires activation to open.</li> </ul>                                                                                                                                                                                  |

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.

| USER NAME | NAME         | GROUP NAME     | USER TYPE | MARKET |
|-----------|--------------|----------------|-----------|--------|
| aragin    | Ragin, Angie | Facility Admin | Others    |        |
| Barrytest | Test, Barry  | Facility Admin | Others    | M1     |
| Btest     | Test, Bill   | Facility Admin | Others    | M1     |

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.<br><br>Select Portal to limit the user to a portal; this removes any Exa or Symmetry rights.<br><br>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/<br>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.<br><br>You can enter a value in the range from 1 to 2880 minutes. The default value is 20 minutes, and if you save a blank value the system automatically restores the default setting of 20.                                          |
| 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.<br><br>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.<br><br>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:<br><br>Associated Patients Only: The provider only sees patients associated with their resource on worklists.                                                                      |

| Setting      | Description                                                                                                                                                                  |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|              | Full Database: The provider is not restricted to seeing their patients only.                                                                                                 |
| Scheduled By | Available when Ordering Facility is selected.<br>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.
  - To manage the user's third-party apps, see [Manage a user's third-party apps](#).

See also:

[Copy settings from one user to another](#)

[Create a user role](#)

## Manage a user's third-party apps

For each configured user, administrators can grant or remove access to any third-party app that your company purchased, such as Updox, nVoq, or Ikonopedia. When granting access, administrators also configure app- and user-specific settings such as location of the app server and the sign-in credentials.



Prerequisite: Obtain the Third Party Tool User Sync user right.

### Procedure

1. Go to [SETUP](#) > [OFFICE](#) > User Management > USERS.
2. Open a user for editing, and at the bottom of the screen, select THIRD PARTY TOOLS.

3. To grant access to an app, in the Add Application dropdown list, select the application.
4. Enter settings in any available app- and user-specific fields that appear, and then select SAVE.

Result: The <%PROGRAM%> synchronizes the settings you entered with the app, and adds the app to the user's Current Applications list.

- To remove access to an app, in the Current Applications dropdown list, select the delete  button.

See also:

[Create a user](#)

## 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

- Go to [SETUP](#) > [OFFICE](#) > User Management > COPY PROFILE SETTINGS.

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



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

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

## Reset a user's password as an administrator

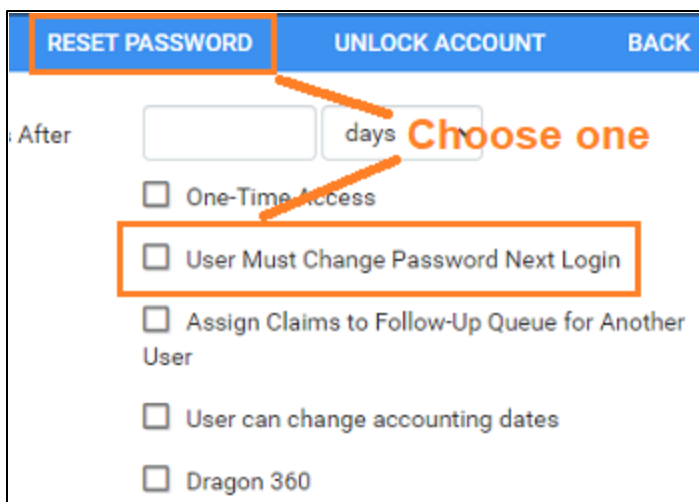
If a user forgets their password, an administrator can reset it or prompt the user to reset it the next time they log in.

### 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.

**USER MANAGEMENT**

**USERS** USER ROLES USER GROUPS AD GROUPS AD USERS

☐ Show Inactive

| USER NAME | NAME         | GROUP NAME     |
|-----------|--------------|----------------|
| adestk    | RDesk, Angle | Front-desk     |
| AnnaGer   | Ger, Anna    | Facility Admin |
| aragin    | Ragin, Angle | Facility Admin |

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

**WORKLIST FILTER** ATTACHED DEVICES USER PERMISSIONS

**>>GENERAL**

**PATIENT INFORMATION**

**STUDY INFORMATION**

**RESOURCE**

**INSURANCE**

**RESET**

☐ Show Encounters Only ☐ Disable Right-Click on Worklist ☐ STAT Studies Override Current Sub-Filter

☐ Show DICOM Studies Only ☐ Show RIS Orders Only ☐ Show Assigned Studies Only

Deleted: All

Date Operations By: ☒ Study Date ☐ Study Received Date ☐ Scheduled Date ☐ Last call made

☐ Created Date

☐ Preformatted: Yesterday

☐ Last: Hour(s) From To

☐ Next

☐ Date From: Date To:

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.                                              |

| Setting                                                                            | Description                                                                                                                                                                                                                                                                                      |
|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.<br>Study Date<br>Study Received Date<br>Scheduled Date<br>Last Call Made<br>Created Date                                                                                                                                                |
| Preformatted                                                                       | Select from a list of preformatted date ranges, rather than manually entering one by using the settings described later.<br>Example:<br>Date Operations = Study Date<br>Preformatted = Last 7 Days<br>"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.<br>Example:<br>Date Operations = Study Received Date<br>Select Last, type 8, select Week(s)<br>"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.

| USER NAME      | LOGGED IN DATE         | CLIENT IP    | LAST ACCESSED                      |
|----------------|------------------------|--------------|------------------------------------|
| Viztek, Pacs   | 03/14/2023 7:37 AM EDT | 10.227.8.240 | 5 m ago                            |
| Service, Admin | 03/14/2023 8:41 AM EDT |              | 37 m ago <a href="#">Terminate</a> |
| Service, Admin | 03/14/2023 7:41 AM EDT |              | 37 m ago <a href="#">Terminate</a> |

- Optional: To view a session log for a user, select the log button.
- 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

- Go to [SETUP](#) > [OFFICE](#) > User Management.

| USER ASSIGNED                                 | ACCESSION NO | ASSIGNED STUDIES                        | STUDY STATUS | ASSIGNED BY  | ASSIGNED DATE |
|-----------------------------------------------|--------------|-----------------------------------------|--------------|--------------|---------------|
| <input type="checkbox"/> Radiologist, Richard | 1166         | 3D RNDR I&R CT MRI US/OTH X REQ POSTPCX | Approved     | Test, Rad    | 03/03/2023    |
| <input type="checkbox"/> Radiologist, Richard | 94           | BONE LENGTH STUDIES                     | Approved     | Roy, Nirmita | 01/18/2023    |
| <input type="checkbox"/> Radiologist, Richard | 29           | ANGRPH ADRNL UNI SLCTV RS&I             | Approved     | Roy, Nirmita | 01/18/2023    |

- 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](#)

[Export and import a study form](#)

[Create a custom form](#)

[Perform a quick query of database totals](#)

[About email templates and notification templates](#)

[Configure an email template](#)

[Set up emailing of results and reports](#)

[Configure a notification template](#)

[Set up sending of notifications](#)

[Create fax cover sheets](#)

[Work with the report queue](#)

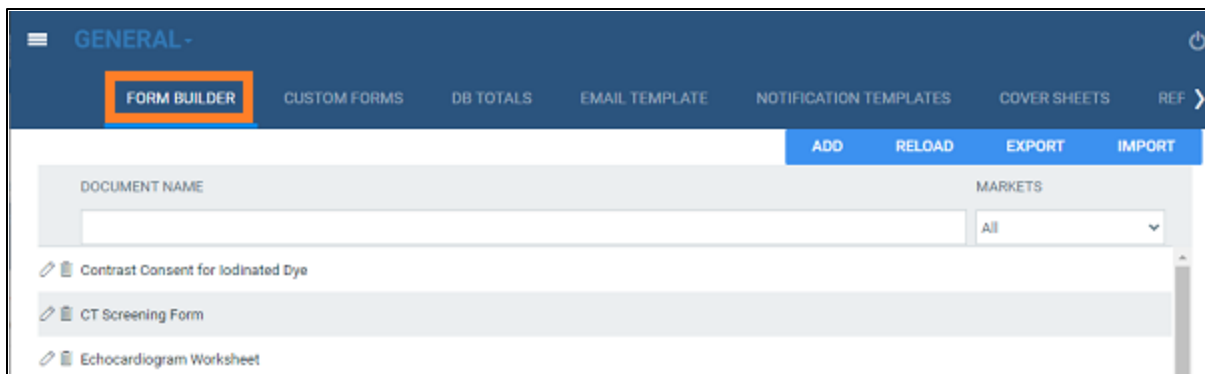
## Create a study form

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 HIPAA 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 ASSIGN sub-tab.

The screenshot shows the 'ASSIGN' tab of a form configuration interface. At the top, the 'Form Name' field is set to 'Test'. Below this, the 'ASSIGN' tab is selected. The form includes several configuration options:

- Document Type:** A dropdown menu labeled 'Select...'.
- Viewable on Patient Portal:** A checkbox.
- Auto Assign to Study:** A checkbox.
- Insurance Provider:** A text input field with a 'Search Carrier' dropdown.
- Allow All with Empty:** A checkbox.
- Allow All without Empty:** A checkbox.
- Physician:** A text input field with a 'Search Physician' dropdown.
- Allow All with Empty:** A checkbox.

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, narrow their availability, 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         | Select to restrict availability to the form to specific insurance providers.                                                                                                                                                         |
| Allow All with Empty       | Select to make all providers available if none are specified.                                                                                                                                                                        |
| Allow All without Empty    | Select to make the setting required.                                                                                                                                                                                                 |
| Physician                  | Select to restrict availability to the form to specific physicians.                                                                                                                                                                  |
| Allow All with Empty       | Select to make all physicians available if none are specified.                                                                                                                                                                       |
| Allow All without Empty    | Select to make the setting required.                                                                                                                                                                                                 |
| CPT Codes                  | Select to restrict the form to studies with specific CPT codes.                                                                                                                                                                      |
| Allow All with Empty       | Select to make available for all CPT codes if none are specified.                                                                                                                                                                    |

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

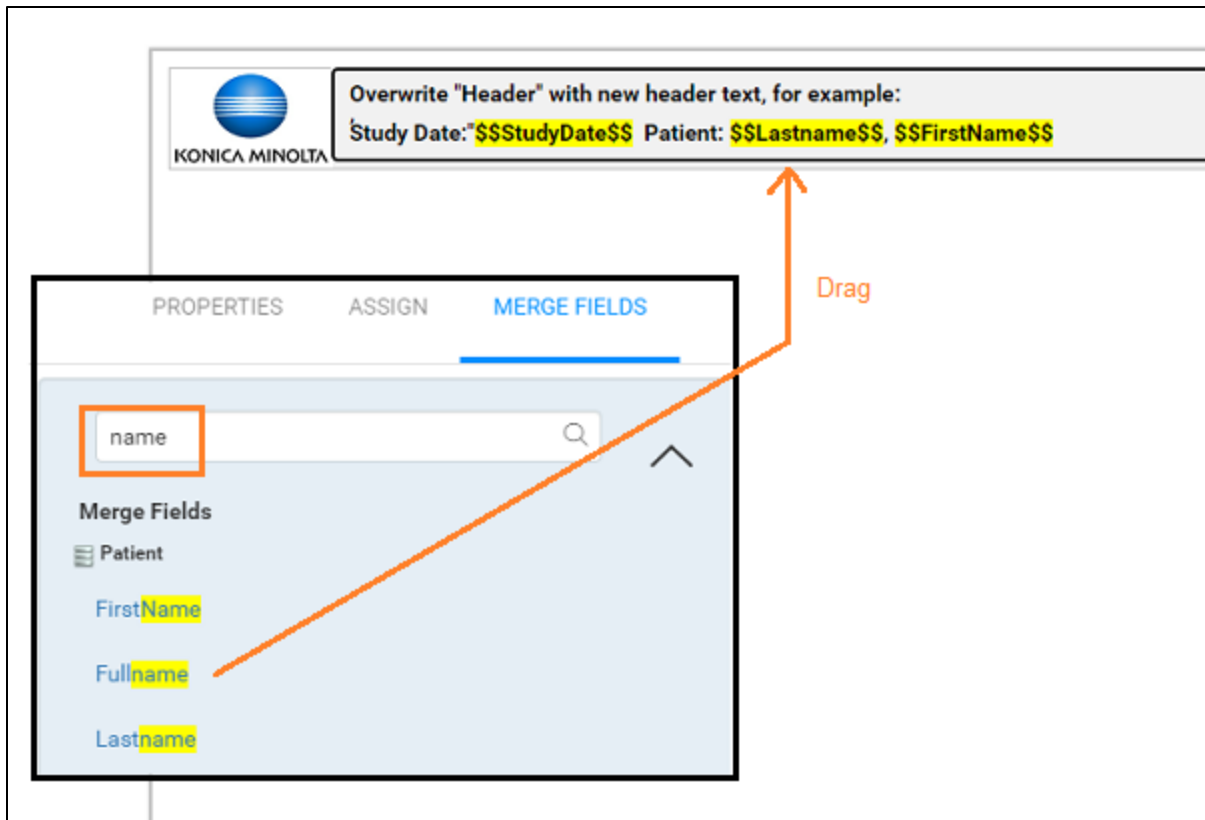
### Add a header to a study form



**Note:** The procedure below describes creating a header "from scratch." To reuse a header from another form, copy the contents of the header and then paste the contents into the header on your new 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 :



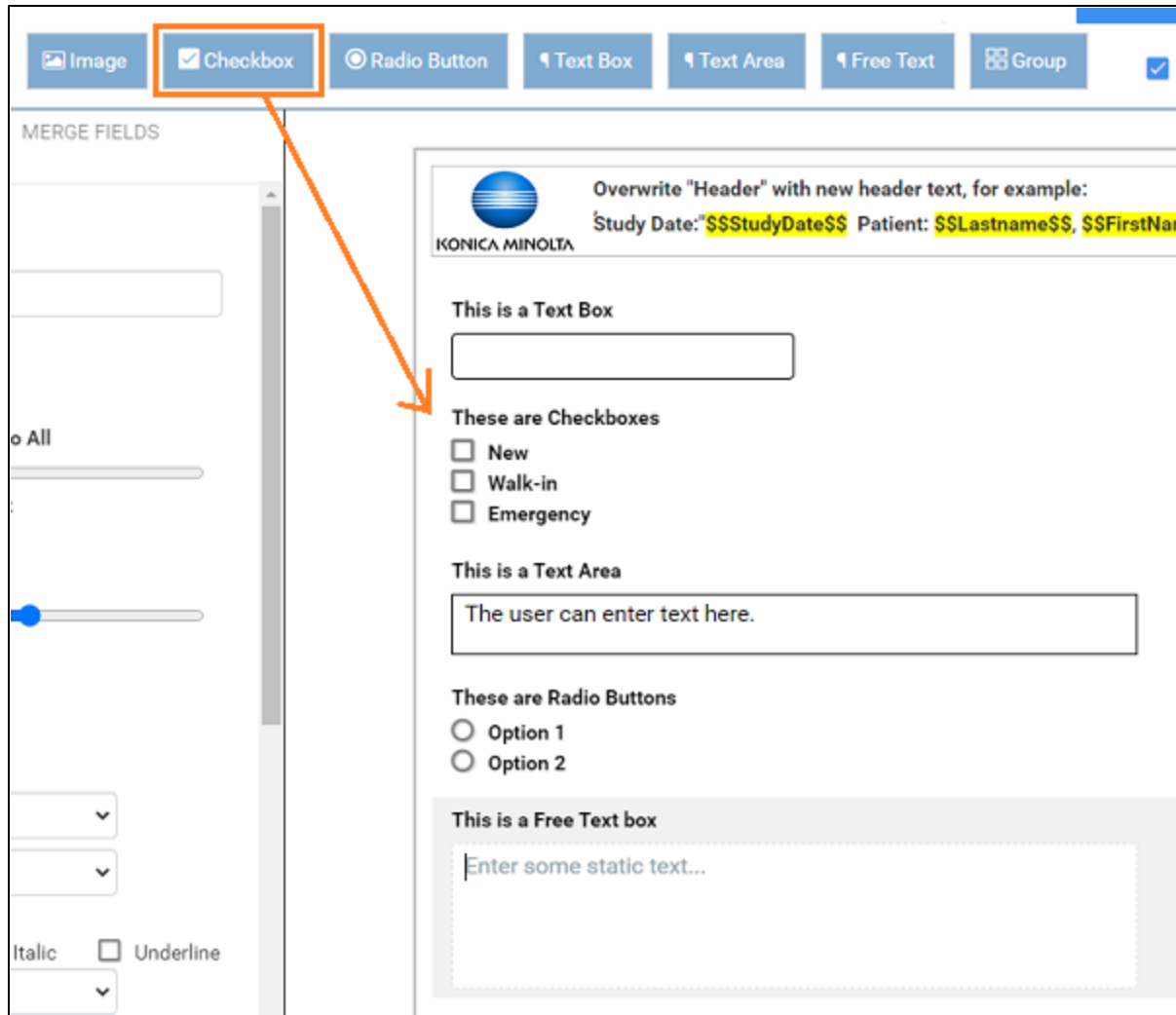
6. In the left pane, on the MERGE FIELDS tab, in the search box, type search term to look for a relevant merge field. For example, type study.
7. In the list of results, double-click a merge field to add it to the form header. For example, double-click StudyDate.
8. To the right of the \$\$\$StudyDate\$\$ 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 on 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.



Note: For advanced text formatting such as bold, *italics*, and color, you can create the text in Microsoft Word and then paste it onto the form.

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

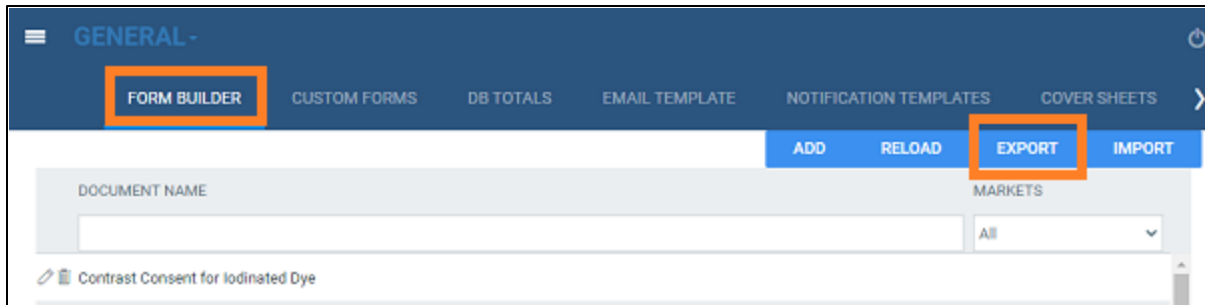
Add a custom form to a patient record

## 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.

**GENERAL -**

FORM BUILDER **CUSTOM FORMS** DB TOTALS EMAIL TEMPLATE

Document Name \* Custom Form Test

☐ Inactive

Description An example

Labels

☐ Patient Review

☐ Patient Mammo Form

☐ Education Material

☒ Reference Document

2. Enter the following settings.

| Setting            | Description                                                                                     |
|--------------------|-------------------------------------------------------------------------------------------------|
| Document Name      | Type a name for the form.                                                                       |
| Description        | Type a general description.                                                                     |
| Labels             | [Unused]                                                                                        |
| Patient Review     | [Unused]                                                                                        |
| Patient Mammo Form |                                                                                                 |
| 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.

### Assign Document

Markets **AUTO HOPKINS MARKET ▾**

Facilities **2 SELECTED ▾**

Modalities **3 SELECTED ▾**

ICD Codes \* **Select ICD ▾**

☐ Allow All with Empty

☐ Allow All without Empty

Medication \* **Medication +**

☐ Allow All with Empty

☐ Allow All without Empty

Lab Codes \* **Select Lab Code ▾**

☒ A00.9,Cholera, uns

☒ Adderal

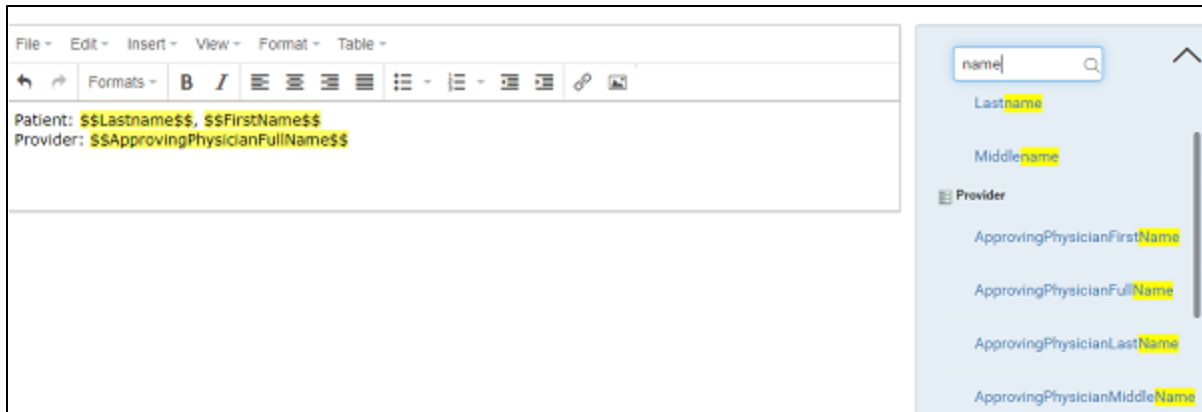
4. Enter the following settings.

| Setting                        | Description                                                                                                                  |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| Markets                        | Select markets where the form is available.                                                                                  |
| Facility                       | Select facilities to which to assign the custom form.                                                                        |
| Modalities                     | Select modalities to which to assign the custom form.                                                                        |
| ICD Codes                      | Select to restrict availability for specific ICD codes.                                                                      |
| Allow All with Empty           | Select to make available for all ICD codes if none are specified.                                                            |
| Allow All without Empty        | Select to make the setting required.                                                                                         |
| Medication                     | Type a medication name, then press the plus <b>+</b> button. The custom form will only be available for medications you add. |
| Allow All with Empty           | Select to be available for all medications if none are specified.                                                            |
| Allow All without Empty        | Select to make the setting required.                                                                                         |
| Lab Codes                      | Select to restrict availability for specific lab codes.                                                                      |
| Allow All with Empty           | Select to make available for all lab codes if none are specified.                                                            |
| Allow All without Empty        | 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          | Select a category for the date range:                                                                                            |
| Study Received Date | Search all studies with a study date within the date range.<br>Search studies whose DICOM receive date is within the date range. |
| Approved Date       | 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 notification of 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:<br><br>Reports<br>PDF attached to email<br>Link attached to email<br>Print and mail<br>Print on selected printers<br>Fax to referring providers<br>Fax to referring provider's office<br><br>Images<br>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"                                                                                                                                                                                                                                | <ul style="list-style-type: none"> <li>• Select checkboxes is "Notification Settings," and</li> <li>• Select notification template in each status at which you want to auto-send.</li> </ul> |

## 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

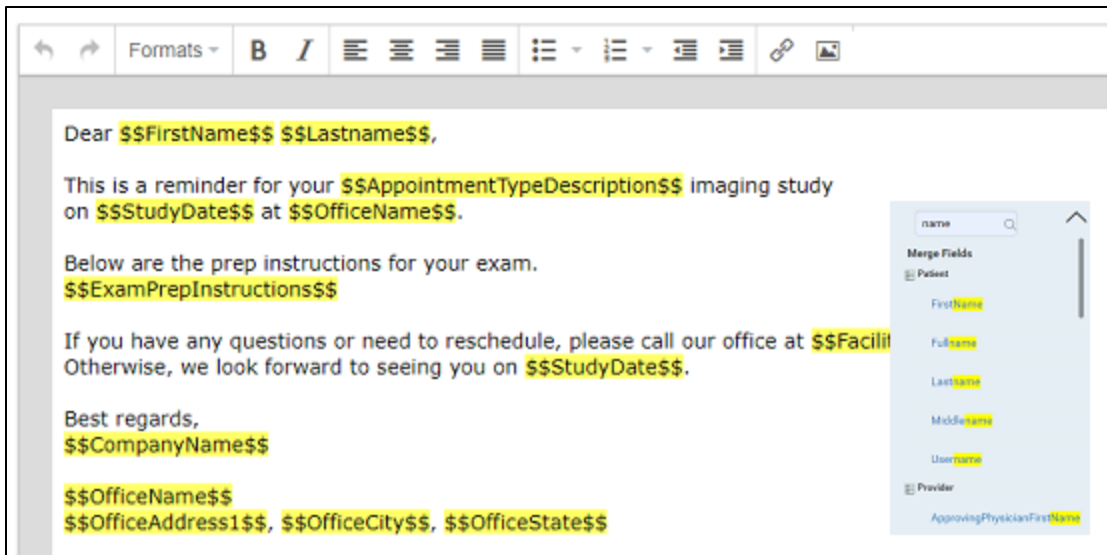
1. Go to [SETUP](#) > [OFFICE](#) > General > EMAIL TEMPLATE.

2. Select ADD.

3. Enter the following settings.

| Setting       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Template Name | Type a name for the template.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Category      | <p>Select the task for which the email based on the template is automatically used.</p> <p>Study Cancellation - Sent to the referring physician upon cancellation of an appointment.</p> <p>Report Link - Upon approval of a report, sent to the referring physician or other resource. To enable, select Email Report Link under Reports to Me in the resource's configuration.</p> <p>Report Attachment - Upon approval of a report, sent to the referring physician or other resource. To enable, select Email Attachment under Reports to Me in the resource's configuration.</p> <p>Patient Portal Registration - Sent upon creating a patient portal account.</p> <p>Transmit Report - Sent to the referring physician upon approval of a report.</p> <p>Confirmation Screen - After scheduling an appointment, the confirmation screen appears based on this template, and you can email the contents to the patient.</p> |
| Subject       | Type text to appear on the email 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 secure email server under "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.

The screenshot shows the 'NOTIFICATION TEMPLATES' page. The top navigation bar has a blue header with 'GENERAL' and several tabs: FORM BUILDER, CUSTOM FORMS, DB TOTALS, EMAIL TEMPLATE, NOTIFICATION TEMPLATES (highlighted), COVER SHEETS, and REPORT. Below the tabs, there's a table with columns: TEMPLATE NAME, SUBJECT, FACILITY, and MARKET. The first row shows 'RefPhyNotification' as the template name, 'Test' as the subject, 'ALL' as the facility, and 'All' as the market. Below the table, there are 'ADD' and 'RELOAD' buttons.

2. Select ADD.

The screenshot shows the 'ADD' form for creating a new notification template. The top navigation bar is the same as the previous screenshot. The form has fields for 'Template Name', 'Subject', and 'Market'. The 'Template Name' field contains 'RefPhyNotification', the 'Subject' field contains 'Test', and the 'Market' field is set to 'NONE SELECTED'. Below these fields, there are 'SAVE' and 'BACK' buttons. A rich text editor is visible with the text '\$\$Fullname\$\$ \$\$AccessionNo\$\$'. On the right, there's a 'Merge Fields' section with a search bar and a list of fields: Patient (FirstName, Fullname, Lastname, Middlename, Username) and Provider.

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.

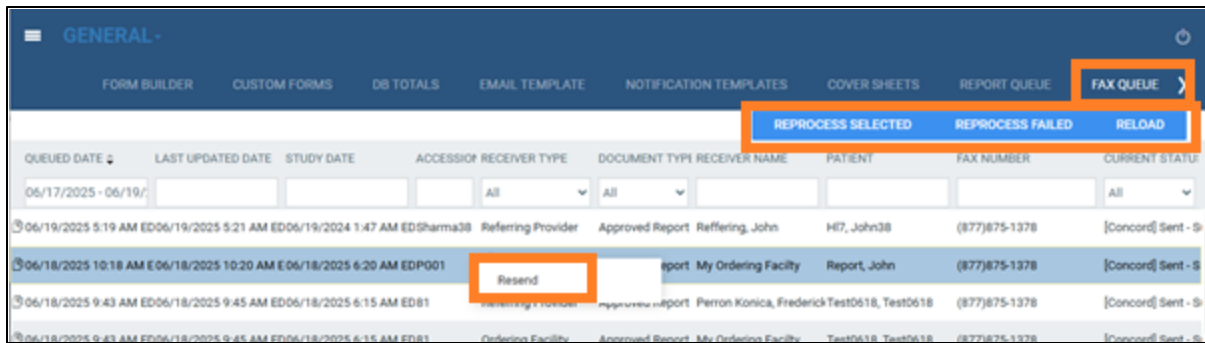
2. To resend a report, right-click it in the list and then select Resend.
3. To resend a batch of reports, at the top of the list, select REPROCESS SELECTED or REPROCESS FAILED.
4. To resend a report automatically at a later time, right-click it in the list and then select Requeue.

## Work with the fax queue

If your facility purchased faxing through Concord Technologies, you can open a fax queue that shows jobs that are currently in process. You can resend (reprocess) individual faxes, or reprocess them in batches.

### Procedure

1. Go to [SETUP](#) > [OFFICE](#) > General > FAX QUEUE.



2. To view fax details, double-click it in the list.
3. To resend a fax, right-click it in the list and then select Resend.
4. To resend a batch of faxes, at the top of the list, select REPROCESS SELECTED or REPROCESS FAILED.

See also:

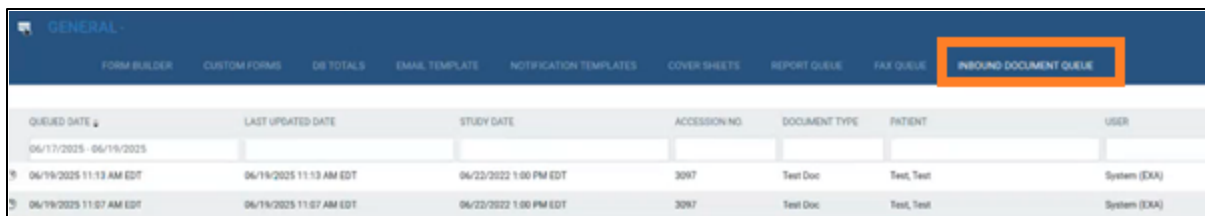
[Work with the inbound document queue](#)

## Work with the inbound document queue

If your facility purchased faxing through Concord Technologies, you can open an inbound document queue that shows faxes that were received, open the faxes, and view metadata.

Procedure

1. Go to [SETUP](#) > [OFFICE](#) > General > INBOUND DOCUMENT QUEUE.



2. To view fax details, double-click it in the list.
3. To resend a fax, right-click it in the list and then select Resend.
4. To resend a batch of faxes, at the top of the list, select REPROCESS SELECTED or REPROCESS FAILED.

See also:

[Work with the fax queue](#)

## 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](#)

## 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

- Go to [Viewer Settings](#) > [GENERAL](#).
- 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.

### Display Settings

Monitors on System   

| Monitor                           | Current               | Prior                 | Full Screen              | Orders                        | Type                          | Calibration Width (mm)        | Calibration Height (mm)       |
|-----------------------------------|-----------------------|-----------------------|--------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|
| <input type="checkbox"/> DISPLAY1 | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value=""/> |

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 the monitor 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. This hides the browser's URL and bookmark bars.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Orders                | <p>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. To make options available, select them in the Auto Open Orders list (see <a href="#">Configure other interface settings</a>).</p> <p>Documents: Opens the document list when you select the  button in the viewer, or when Auto Open Documents is enabled.</p> <p>Notes: Opens the Notes screen.</p> <p>Transcription: Opens the Transcription screen (Exa Trans, Web Trans, or other).</p> <p>Other: Select other screens in the list.</p> |
| Type                  | <p>The color or grayscale display type.</p> <p>For example, to force ultrasounds to appear on a color monitor, select Color Only for that monitor here, and then in b settings, set US to Assume Color Study.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 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

- Go to [Viewer Settings](#) > [GENERAL](#).

### Autosave Options

- ☐ Autosave Image Properties on Close
- ☐ Autosave Image Annotations on Close
- ☐ Auto Mark Read Study on Close
- ☐ Auto Upload Dictation on Close
- ☐ Autosave Viewer Settings on Close
- ☒ Auto Open Next Study
- ☐ Auto Send Annotated Images on Close

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.<br><br>For confirmation before saving, also select Interface > Ask On Close.    |
| 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      | Highly recommended if you use dictation. 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.<br><br>If the next study is not available in a file store, the program downloads it from AHL, if available. |
| 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

- Go to [Viewer Settings](#) > [INTERFACE](#).
- Under Toolbar, enter settings described in the table below.

Toolbar

Toolbar Button Scale

%

Thumbnail Bar Scale

%

Magnifying Glass Size

200

Px. Factor

2

W/L Acceleration

100

Span Sensitivity

Auto Dflt Low

High

☐ Span as Scroll

Thumbnail Column/Rows

Thumbnail Bar Orientation

Left

Header Menu

Top

DM Toolbar

Top



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      | <p>Sets the rate or sensitivity of span adjustments.</p> <p>Auto - Adjusts the speed automatically based on the number of images in the series.</p> <p>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.</p> <p>Low/High - Spans slowly or quickly.</p> <p>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.</p> |
| Thumbnail Column/Rows | Sets the number of columns and rows for the thumbnail bar.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

| Setting                   | Description                                                                                                                                                                                                                                                                                                      |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.

Caliper Position

☐ Left
 ☐ Top
 ☒ Right
 ☐ Bottom

## 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.

### Other Toolbar

- ☐ Ask on Close
- ☐ Single Instance Mode
- ☐ Skip Frames in Cine to Maintain Playback Speed
- ☐ Show Cutlines for First/Last Images
- ☐ Open Key Images as Single Images
- ☐ Use Modified Toolbar
- ☐ Caliper Zoom
- ☐ Auto-Play Cine Loops
- Auto Play Cine Wait Time (ms)
- Default Frame Rate for MP4
- Default Outline Thickness

### Auto Open Orders

☐ Activity Log  
☐ Additional Information  
☐ Allergies  
☐ Approved Reports  
☐ CCRos

- ☐ Auto Show Priors Bar
- ☒ Focus-In on Zoom Point
- ☒ Fill Empty DM Cells
- ☐ High-Quality Interpolation
- ☐ Enable RGB/YBR Swap
- ☐ Enable Developer Mode
- ☐ Show Calibrated Ultrasound Region

- ☐ Hide Partial Close Button
- ☐ Hide All Monitor Layout Change Button
- ☐ Show Label in DM Preview
- ☐ Show Middle Slice Thumbnail
- ☐ Enable Cardio Viewer
- Disable Queuing
- ☒ Stretch Prior Bar
- ☒ Show Prior Index
- ☐ Auto Open STAT
- ☐ Split W/L Region
- ☐ Color Only as Last Monitor
- ☐ Client-Side Window/Level for US
- ☐ Show Span Overlay

### 3D Advanced Visualization

- ☒ Enable 3D Advanced Visualization

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

| Setting                                        | Description                                                                                                                                                                                                                                                                                       |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ask on Close                                   | Prompts you to specify which items to save before closing the viewer, related to the <a href="#">Autosave</a> 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.                                                                                                                                                                                                  |

| Setting                                       | Description                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fill Empty DM Cells                           | Fills undefined DM frames with the next available images in the current study.                                                                                                                                                                                                                                                                                                                             |
| 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 "grid lines" 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.<br><br>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.<br><br>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.                                                                                                                                                                                                                                                                                                                                                      |
| 3D Advanced Visualization (Exa PACS RIS Only) |                                                                                                                                                                                                                                                                                                                                                                                                            |
| Enable 3D Advanced Visualization              | Enables 3D Advanced Visualization for MPR. Adds the 3D Advanced Visualization toolbar section under <a href="#">Add or remove toolbar tools</a> .                                                                                                                                                                                                                                                          |

### 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.

### Annotation

- ☒ Show Annotation
- ☒ One-Click Annotations
- ☒ Show One-Click Annotations Button
- ☒ Annotation Edit Mode
- ☐ Use Dot Cursor
- ☒ Edit Annotations after Creating
- ☐ Allow Drag Create
- ☒ Confirm Annotation Delete
- ☒ Persistent Annotation Tool

Show Measurements In mm ▼

| 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. |
| 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.

|                  | Color   | Grayscale |
|------------------|---------|-----------|
| Anno Color 1     | #FFFF00 | #FFFFFF   |
| Anno Color 2     | #00FF00 | #FFFFFF   |
| Anno Color 3     | #0000FF | #FFFFFF   |
| Anno Color 4     | #FF00FF | #FFFFFF   |
| Anno Color 5     |         | #FFFFFF   |
| Anno Color Edit  | #FF0000 | #FFFFFF   |
| Anno Color Hover | #FF00FF | #FFFF00   |

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.

**Miscellaneous**

Scale in Pixel Size ☐

Scale Annotation Font By

Scale Annotation Point By

Invert SR Reports ☐

Default SR Report Font Size

| 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.<br>Scale Pixel Size ON: Default is approximately 10<br>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.

### Recording Control

☐ Hold for Record
 ☐ Beep on Record (heard on recording)
 ☐ Blink on Record Pause
 ☐ Monkey Chatter on Rewind

FFWD/RWD Factor (200–500)

Lag (0–5000)

| 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.

### Tool Buttons

☐ Hide Document
 ☐ Hide Notes
 ☐ Hide Print
 ☐ Hide Reports
 ☐ Hide Transcription

3. Select SAVE.

## Configure fusion

You can configure options for fusion.

1. Go to [Viewer Settings](#) > [INTERFACE](#).
2. 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. |

3. 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.

**SETTINGS**

**GENERAL**

**INTERFACE**

**MODALITY**

**MAMMOGRAPHY**

**OVERLAYS**

**TOOLS**

**EXTERNAL TOOLS**

**Layout**

Screen Layout: 1\*1

Series Layout: 1\*1

**Compression**

None: Diagnostic

**Mouse Buttons**

Left: None

Right: None

Middle: None

Left+Right: None

**Presets**

| Key | Description | Window Width | Window Center |
|-----|-------------|--------------|---------------|
| 0   |             |              |               |

**Options**

☐ Auto Linking ☐ Do Not Skip Images

**SAVE**

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                                                                                                                                             | <p>Assigns functions to mouse buttons. This is frequently used by CAD users to assign functions to extra mouse buttons.</p> <p>To disable mouse buttons, set all to None.</p> <p>Note: These settings apply to Exa Advanced Visualization, except for the following tools: Context, Triangulation, Hounsfield, and Magnify.</p> |
| Compression   |                                                                                                                                                                          | <p>Sets the image quality, which inversely affects viewer performance.</p> <p>None: Diagnostic = PNG</p> <p>Bmp: Diagnostic = BMP</p> <p>Low: Non-Diagnostic = JPEG</p> <p>Medium: Non-Diagnostic = JPEG</p> <p>High: Non-Diagnostic = JPEG</p>                                                                                 |
| Presets       | To add a W/L preset, set each of the following and select SET. To apply a preset, use the shortcut key that you assign, or select the preset in the image shortcut menu. |                                                                                                                                                                                                                                                                                                                                 |
|               | Key                                                                                                                                                                      | Select a shortcut key to assign to the preset.                                                                                                                                                                                                                                                                                  |
|               | Description                                                                                                                                                              | Type a name for the preset.                                                                                                                                                                                                                                                                                                     |
|               | Window Width                                                                                                                                                             | Type the window width of the preset.                                                                                                                                                                                                                                                                                            |
|               | Window Center                                                                                                                                                            | Type the window center of the preset.                                                                                                                                                                                                                                                                                           |
| Options       | Auto Linking                                                                                                                                                             | Automatically numerically links the current series projection (Sagittal, Coronal, and Axial) with all other like series projections in that study. Linked images automatically appear, to the extent possible, in the same order in the stack.                                                                                  |
|               | Assume Color Study                                                                                                                                                       | Forces studies of the selected modality to appear in the default color monitor set in the display settings regardless of color.                                                                                                                                                                                                 |
|               | Assure All Viewed                                                                                                                                                        | Displays a check mark in thumbnails of images that were opened, and warns the user when closing before all images are opened.                                                                                                                                                                                                   |
|               | Auto CLAHE                                                                                                                                                               | 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.                                                                                                                                                                                                                                        |

| Section | Setting                                | Description                                                                                                                                                                                                     |
|---------|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|         | 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.                       |
|         | 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 to ignore any extra information from certain vendors such as 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.                                                                                                                                                     |

| Section          | Setting                           | Description                                                                                                                                                                                                                                                                                                  |
|------------------|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | 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.<br><br>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   | Compensates for series where the first and last images may require different W/L settings than the rest of the series.<br><br>Select to use the original W/L of each individual image.<br><br>Clear to use the first W/L sent by the modality for all images.<br><br>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.                                                                                                                                                                                                                                      |
|                  | 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       | When Auto linking is also selected, this option plays cine loops on all linked series.                                                                                                                                                                                                                       |
|                  | Disable Caliper on Cine           | Available when Active Frame Based Cineplay is selected. Hides calipers during cine playback.                                                                                                                                                                                                                 |
| Auto-Split Rules | Always                            | Splits US and MR series into individual images by series instance UID (0020,0000e).                                                                                                                                                                                                                          |
|                  | Differing Echo Time               | Splits by echo time. Typically used for MR studies.                                                                                                                                                                                                                                                          |
|                  | 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.                                                                                                                                                                                                                               |

| Section             | Setting                                                          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|---------------------|------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                     | 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.<br>May be useful for US and MG studies with multiframe images and DICOM cines.                                                                                                                                                                                                                                                                                                                                                                                                                     |
|                     | Isolate Multiframe                                               | Splits SC and cine loops into multiple images.<br>May be useful for US and MG studies with multiframe images and DICOM cines.                                                                                                                                                                                                                                                                                                                                                                                           |
| 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).<br><br>Normal: Use the W/L tags from the modality, if available.<br><br>Raw Img: Ignore W/L tags and allow the viewer to auto-contrast the image.<br><br>Full: Allows full range of W/L by bit depth:<br>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.<br><br>Image Number: Displays images by DICOM instance number, lowest to highest.<br><br>Image Number Inverse: Displays images by DICOM instance number, highest to lowest.<br><br>Slice Location: Displays images by DICOM slice location, lowest to highest.<br><br>Slice Location Inverse: Displays images by DICOM slice location, highest to lowest.<br><br>Image Time: Displays images by DICOM acquisition time, lowest to highest. |
| Prior Options       | To make priors available in the viewer, configure the following. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|                     | Auto Open Prior                                                  | Automatically opens prior studies.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|                     | Relevant Priors                                                  | When automatically opening priors, opens relevant priors from all modalities. See "Define relevant priors" later in this topic.                                                                                                                                                                                                                                                                                                                                                                                         |
|                     | Auto Open Prior Count                                            | When automatically opening priors, opens up to the selected number of studies.                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|                     | Force Relevant Only                                              | Opens only the defined relevant priors of the current study (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."

| Modality | Body Part | Description    | Main Study Body Part | Main Study Description |
|----------|-----------|----------------|----------------------|------------------------|
| CT       |           | (CHEST THORAX) |                      | (CHEST 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.

### Prior Options

☒ Auto Open Prior  
☒ Relevant Priors  
 Auto Open Prior Count:

☒ Force Relevant Only  
☒ Prioritize Current Modality First

| Modality | Body Part | Description                                | Main Study Body Part | Main Study Description                     |   |   |
|----------|-----------|--------------------------------------------|----------------------|--------------------------------------------|---|---|
|          |           | (CLAVICLE SCAPULA SHOULDER).*(LEFT RT BI)  |                      | (CLAVICLE SCAPULA SHOULDER).*(LEFT RT BI)  | ✎ | ✖ |
|          |           | (CLAVICLE SCAPULA SHOULDER).*(RIGHT RT BI) |                      | (CLAVICLE SCAPULA SHOULDER).*(RIGHT RT BI) | ✎ | ✖ |



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.

### SETTINGS

**SAVE**

**GENERAL** Font Family:  Size:

**INTERFACE** Modality:

**MODALITY**

**MAMMOGRAPHY**

**OVERLAYS**

**TOOLS**

**EXTERNAL TOOLS**

#### Left Overlay

Field:

Prefix:  Mask:  **ADD**

- ✕ institution(0008,0080)
- ✕ institution\_addr(0008,0081)
- ✕ ID\_dicom\_patient\_id(0010,0020)
- ✕ Name\_patient\_name(0010,0010)
- ✕ DOB\_birth\_date(0010,0030)
- ✕ SEX\_patient\_sex(0010,0040)
- ✕ DE\_study\_dt(0008,0020)

#### Right Overlay

Field:

Prefix:  Mask:  **ADD**

- ✕ Image\_instanceIndex
- ✕ StudyID\_dicom\_study\_id(0020,0010)
- ✕ Spacing\_spacing\_between\_slices(0018,0088)
- ✕ AN\_accession\_no(0008,0050)
- ✕ Flip\_flip\_angle(0018,1314)
- ✕ Loc\_slice\_location(0020,1041)
- ✕ Thk\_slice\_thickness(0018,0050)

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: <ul style="list-style-type: none"> <li>• Select a property from the list, or</li> <li>• Type a DICOM tag (e.g. 0020,0010)</li> </ul> |
|                    | 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

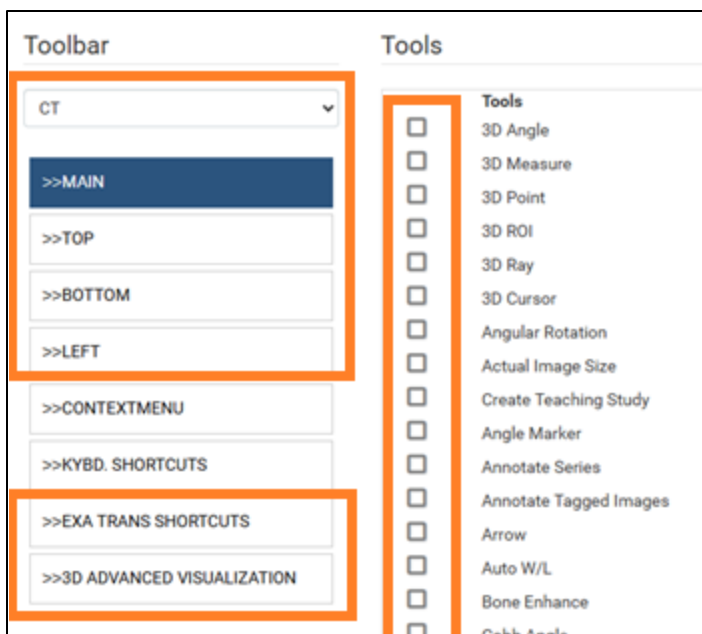
You can add or remove tools from various viewer toolbars in the program, and customize your choices by modality.



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.

EXA TRANS SHORTCUTS – The toolbar available when using Exa Trans.

3D ADVANCED VISUALIZATION – The toolbar available when using Exa Advanced Visualization.

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](#)

[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.

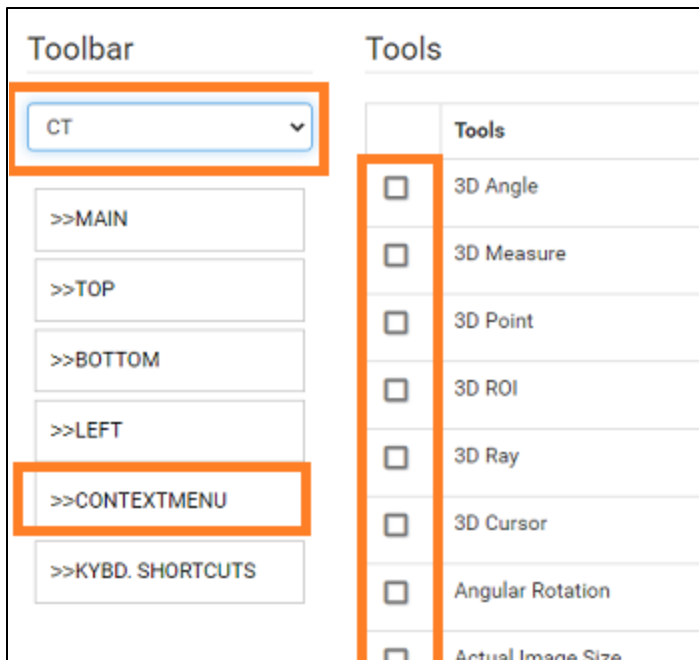


**Caution:** Plan your settings carefully in advance. Any time you add or remove tools it overwrites your previous selections.

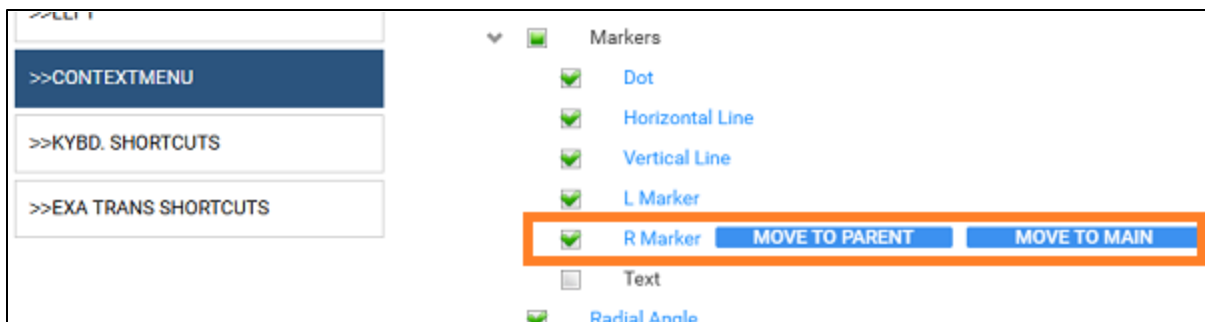
### Procedure

1. Go to [Viewer Settings](#) > [TOOLS](#).

- Under Toolbar, select the modality whose shortcut menu you want to customize.



- In the list, select CONTEXT MENU.
- Under Tools, select or clear the checkboxes for tools that you want to add or remove.
- Optional: If you want a tool to appear at the top of the shortcut menu (without having to select submenus), clear the tool's checkbox, reselect it, and then select MOVE TO PARENT or MOVE TO MAIN.



- Select SAVE.

See also:

[Add or remove toolbar tools](#)

[Assign toolbar keyboard shortcuts](#)

[Viewer tools and keyboard shortcuts](#)

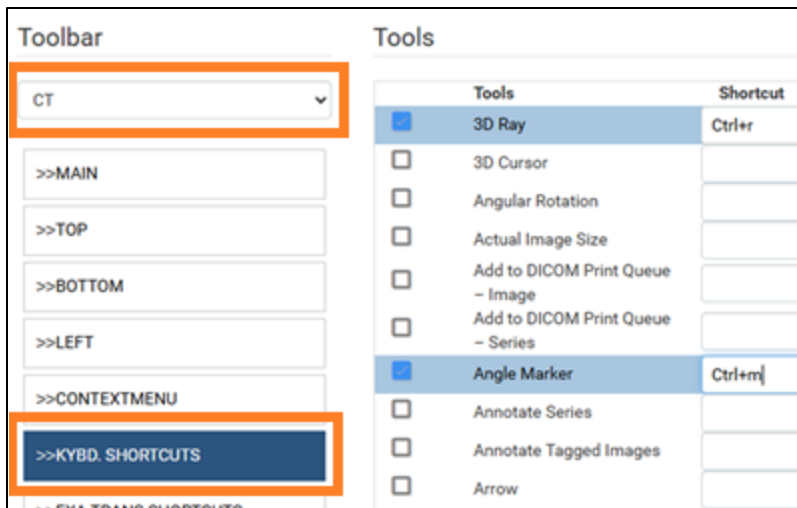
## Assign toolbar keyboard shortcuts

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

### Procedure

- Go to [Viewer Settings](#) > [TOOLS](#).

- Under Toolbar, select the modality for which you want to assign shortcuts.



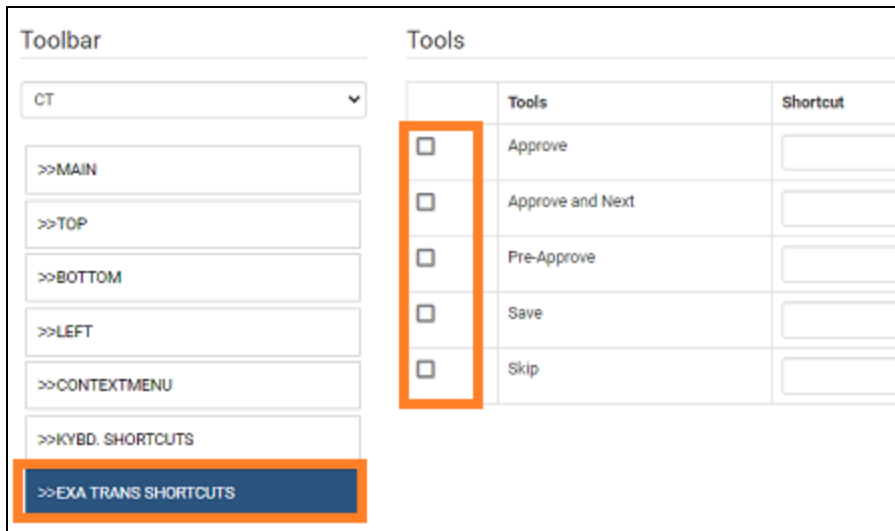
### Main tools

- In the list, select KEYBOARD SHORTCUTS.
- Under Tools, select the checkboxes of the tools to which you want to assign shortcuts.
- 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 (+, -, \*, /)

### Exa Trans Shortcuts

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](#).

- In the list, select EXA TRANS SHORTCUTS.

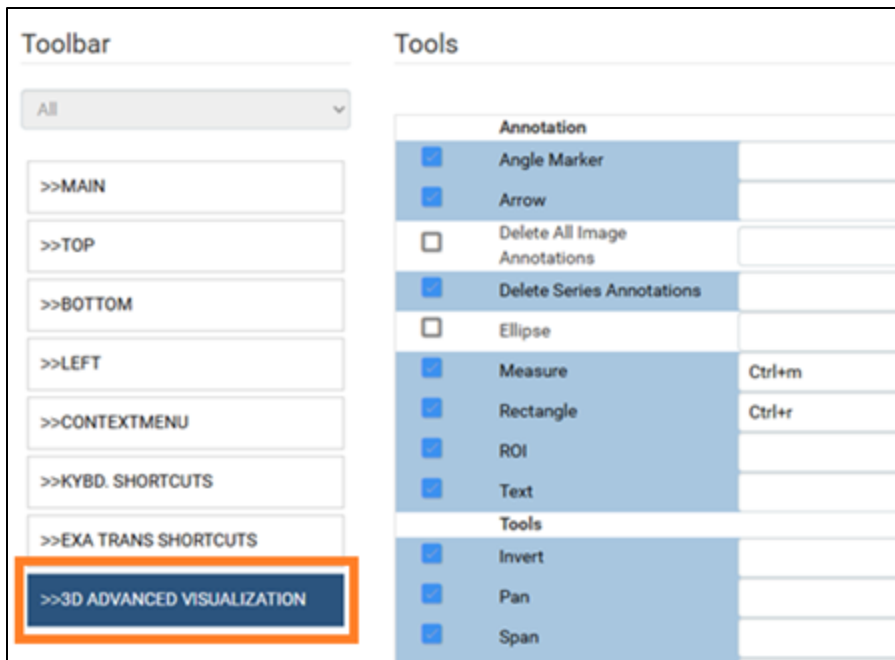


2. Select tools and type keyboard shortcuts as described above, and then select SAVE.

## Exa Advanced Imaging

You can assign keyboard shortcuts to common functions in Exa Advanced Visualization. To use a keyboard shortcut that you assign here, open an image in EAV (see Use Exa Advanced Visualization ).

1. In the list, select 3D ADVANCED VISUALIZATION.



2. Select tools and type keyboard shortcuts as described above, and then select SAVE.

See also:

[Add or remove toolbar tools](#)

[Add or remove tools from the image shortcut menu](#)

[Viewer tools and keyboard shortcuts](#)

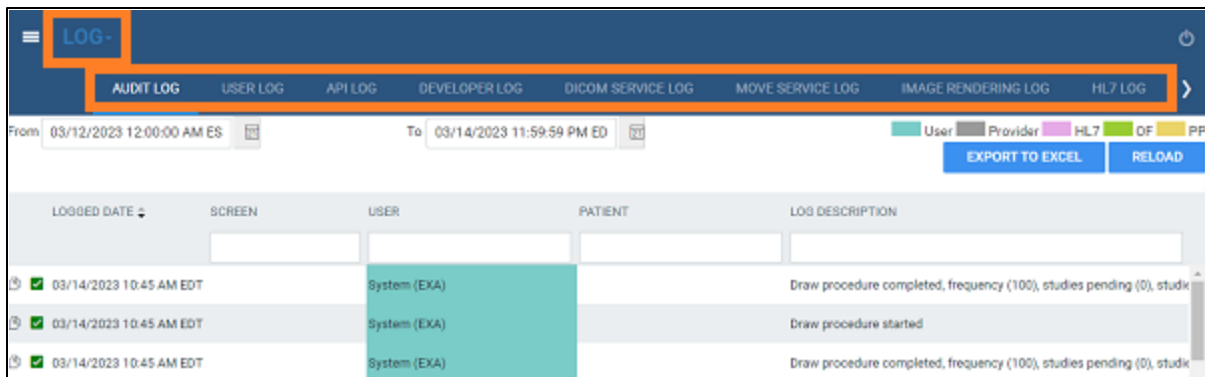
## View logs

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

### View standard logs

#### Procedure

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



3. If viewing the audit log, use the From and To date pickers to select a date range.
4. Optional. Select column headers to sort.
5. Double-click entries to view details.

### View HL7 logs

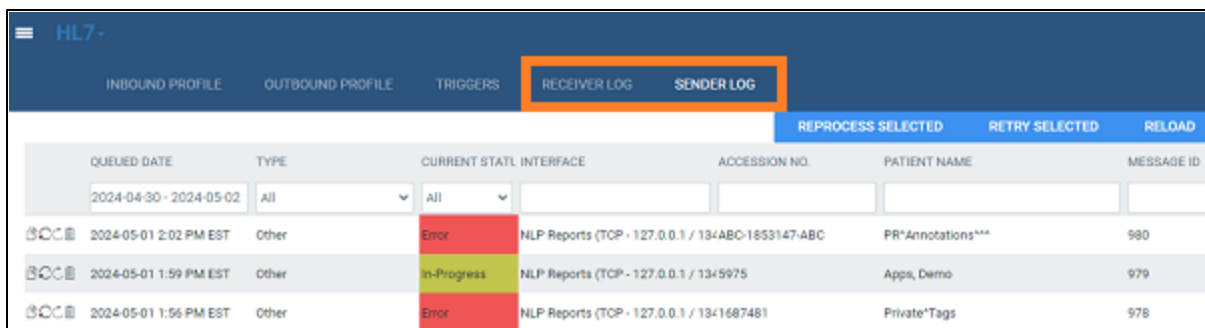


Caution: Do not modify settings in the HL7 INBOUND PROFILE, OUTBOUND PROFILE, and TRIGGERS tabs. If necessary, contact Konica Minolta for assistance.

If studies do not arrive in or from Symmetry PACS, you can check the HL7 receiver and sender logs for errors.

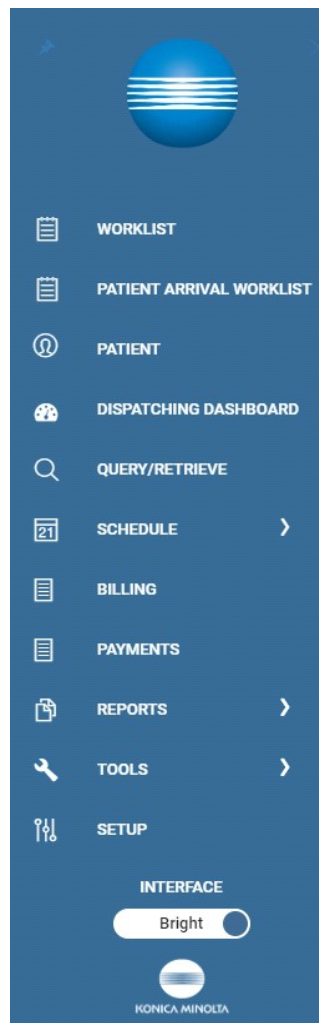
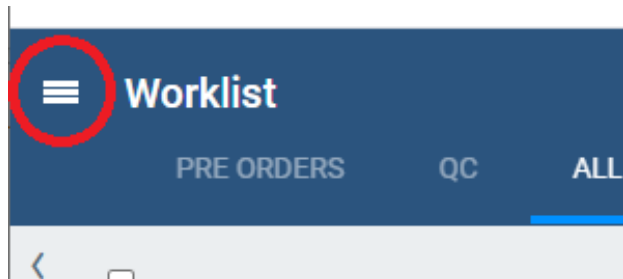
#### Procedure

1. Go to [SETUP](#) > [OFFICE](#) > HL7.
2. Select the RECEIVER LOG or SENDER LOG tab.



## 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 Exa Mobile.

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

[Open the dashboard](#)

[Add or remove gadgets from the dashboard](#)

[Change the graph type of a gadget](#)

[Change the facility of a graph](#)

[Change the date range of a graph](#)

## 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

- On the burger  menu, select DASHBOARD.
- To remove a gadget, select its remove  button.
- To add a gadget, find Add Gadget and select its add  button.
- 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

- On the burger  menu, select DASHBOARD.
- On a gadget, select the graph  button.
- 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

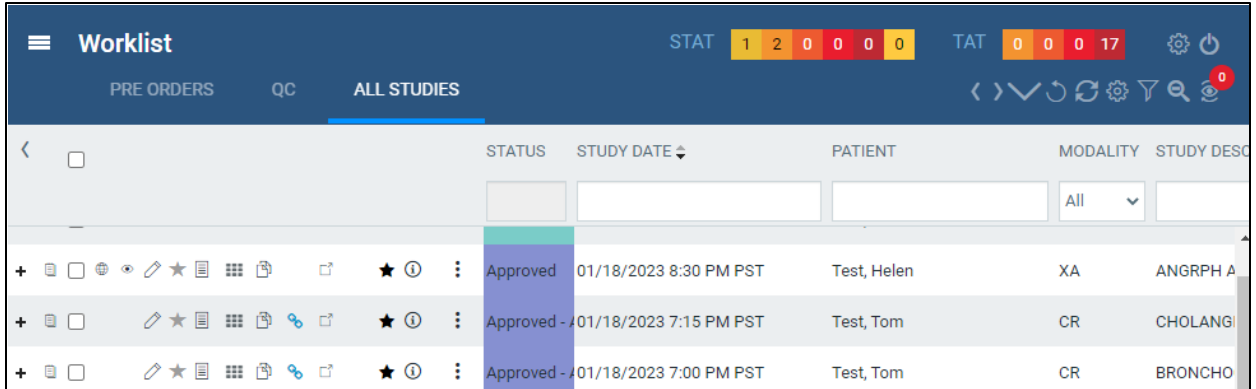
1. On the burger  menu, select DASHBOARD.
2. On a gadget, select the date range  button.
3. In the button shortcut menu, select a date range and then select Apply.

## 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](#).



|   | STATUS   | STUDY DATE             | PATIENT     | MODALITY | STUDY DESCRIPTION |
|---|----------|------------------------|-------------|----------|-------------------|
| + | Approved | 01/18/2023 8:30 PM PST | Test, Helen | XA       | ANGRPH A          |
| + | Approved | 01/18/2023 7:15 PM PST | Test, Tom   | CR       | CHOLANGI          |
| + | Approved | 01/18/2023 7:00 PM PST | Test, Tom   | CR       | BRONCHO           |

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](#)

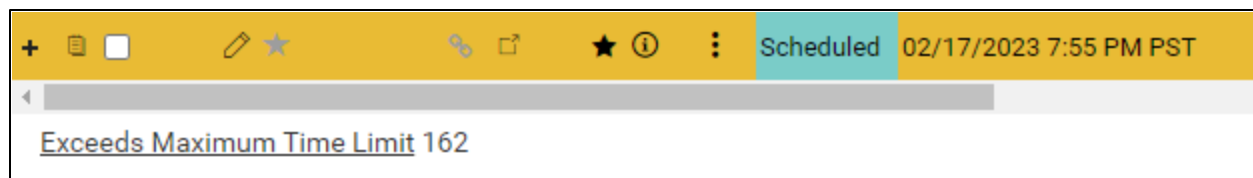


- |   |               |                             |
|---|---------------|-----------------------------|
| 7 | Search tools  | Shows/hides the search bar. |
| 8 | Disagreements | Exa PACS RIS only.          |

## 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<br>(Can be hidden)     | PRE ORDERS                 | Exa PACS RIS only.                                                                                                                                                                                                       |
|                                 | QC                         | Lists received studies needing reconciliation.<br>See <a href="#">QC operations</a> .                                                                                                                                    |
| Permanent<br>(Cannot be hidden) | ALL STUDIES                | Lists all DICOM studies and scheduled RIS orders that are not currently on the QC tab.                                                                                                                                   |
| User Filters<br>(Can be hidden) | [user-defined]             | Provide a highly customized view of the worklist.<br>See <a href="#">Create a user worklist filter</a> .                                                                                                                 |
| 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.<br>See <a href="#">Configure an administered worklist filter</a> .                                                 |
| 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.



- 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

- On the worklist [lower toolbar](#), select the filter  button.

- In the Study Filter dialog, select ADD.
- 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.                                            |

| Setting                | Description                                                                                                                                                      |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assign                 | Available when you select Is Private. Use these settings to assign the filter to specific users or user groups (available with the Assign Study to Users right). |
| Default Column/Sort By | Sorts the worklist by the column and order that you select.                                                                                                      |
| 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

The screenshot shows the 'Study Filter' dialog box with the following settings:

- Filter Name:** Test
- Joined Filters:** NONE SELECTED
- Filter Order:** 1
- Is Private:** ☒
- Display as a Tab:** ☒ **Display in Dropdown:** ☒ **Show Only Exceeding Max Time:** ☐
- Show DICOM Studies Only:** ☒ **Show RIS Orders Only:** ☐ **Show Assigned Studies Only:** ☐
- Deleted:** All (dropdown menu) **Show Pre-Orders Only:** ☐
- Assign:** Select User (dropdown) + Radiologist (tag) + Radiologist (tag)
- Default Column/Sort By:** (empty dropdown)

Buttons at the top right: SAVE, CLEAR, BACK.

The screenshot shows the 'STUDY INFORMATION' tab in the Symmetry PACS 34.1.2 user interface. The interface is divided into several sections, each with radio buttons for 'Is' and 'Is Not' and a dropdown menu. The sections are:

- Institution:** Radio buttons for 'Is' and 'Is Not', and a dropdown menu.
- Facility:** Radio buttons for 'Is' and 'Is Not', and a dropdown menu with options: 'Angie Facility', 'GobikaTestFacility', 'Meera Facility', 'My Company'.
- Modality:** Radio buttons for 'Is' and 'Is Not', and a dropdown menu with options: 'BD', 'BR', 'CR', 'CT'.
- Modality Room:** Radio buttons for 'Is' and 'Is Not', and a dropdown menu with options: 'Angie', 'Computer Tomo', 'CR', 'CT'.
- Last call category:** Radio buttons for 'Is' and 'Is Not', and a dropdown menu with options: 'Cancellation', 'Follow-up', 'Other', 'Re-schedule', 'Schedule'.
- Ordering Facility:** A dropdown menu with the text 'Select ordering facilities' and a '+' button.
- Status:** Radio buttons for 'Is' and 'Is Not', a checkbox for 'Last Changed By Me', and a dropdown menu with options: 'Tech Pause', 'Tech Start', 'Transcribed', 'UnRead', 'Validated'.

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.

The screenshot shows the 'Study Filter' dialog box. It has a 'Default Tab' dropdown set to 'All Studies'. Below this is a table with the following data:

| FILTER NAME       | FILTER TYPE | FILTER ORDER |
|-------------------|-------------|--------------|
| All Studies       | Global      | 0            |
| Delete or Edit Me | Private     | 2            |
| Test              | Private     | 3            |

The 'Delete or Edit Me' and 'Test' filters have edit and delete icons next to them, which are highlighted by an orange box.

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](#)

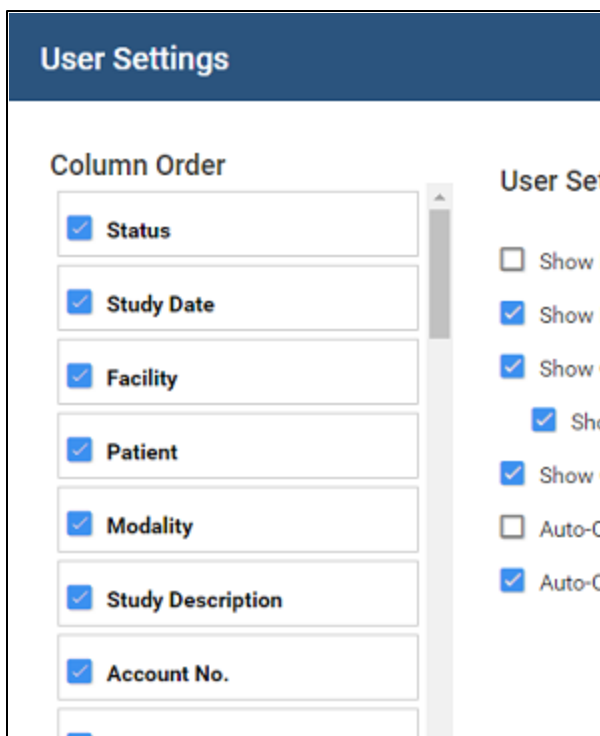
[Configure other user settings](#)

## 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](#).

**User Settings** SAVE

|                                                                        |                              |              |
|------------------------------------------------------------------------|------------------------------|--------------|
| <input type="checkbox"/> Show Row Number                               | Double-Click Behavior        | Web View ▾   |
| <input checked="" type="checkbox"/> Show Priors                        | Double-Click (Scheduled)     | Edit Orde ▾  |
| <input checked="" type="checkbox"/> Show QC                            | Default Tab                  | All Studie ▾ |
| <input checked="" type="checkbox"/> Show Completed in Pending List     | Default Filter (Local Cache) | ▾            |
| <input checked="" type="checkbox"/> Show Orders Tab                    | Default Column               | Study Da ▾   |
| <input type="checkbox"/> Show Recent Studies                           | Sort By                      | Desc ▾       |
| <input type="checkbox"/> Auto-Open New Order                           | Audio Player Lag Time        | 4 sec ▾      |
| <input checked="" type="checkbox"/> Auto-Open Appointment Confirmation | Auto Open Priors             | On ▾         |
|                                                                        | Open Prior Reports           | On ▾         |
|                                                                        | Voice recognition            | Dictation ▾  |
|                                                                        | Delay Load of Exa Trans      | Off ▾        |
|                                                                        | Exa Trans Font               | ▾            |

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 <b>+</b> or collapse <b>—</b> 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).                                                                                                                      |
| Auto-Open Appointment Confirmation | Select to automatically open the appointment confirmation screen after selecting the CREATE ORDER button (Symmetry PACS only). See also <a href="#">Confirm an appointment</a> .                                                      |

| Setting                      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.<br>See <a href="#">Install and configure local cache</a> .                                                                                                                                                                                                                                                                                                                                                             |
| 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:<br><br>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.<br><br>Dictation (Web Trans): Opens Exa Dictation.<br><br>Other (Exa Trans/SDE): Opens Exa Trans with no Exa platform-based voice recognition app (which can be faster).<br><br>Off (None): Does not open a voice recognition tool.<br><br>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](#)

[View series and images](#)

[View priors](#)

[View recent studies](#)

[Open a pop-up window for physicians and ordering facilities](#)

[Use the study toolbar buttons](#)

[About Linked Reporting](#)

[Link reports](#)

[Unlink a report](#)

[Work with Ultra Acquire](#)

[Update the worklist or viewer](#)

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

[View the caching status](#)

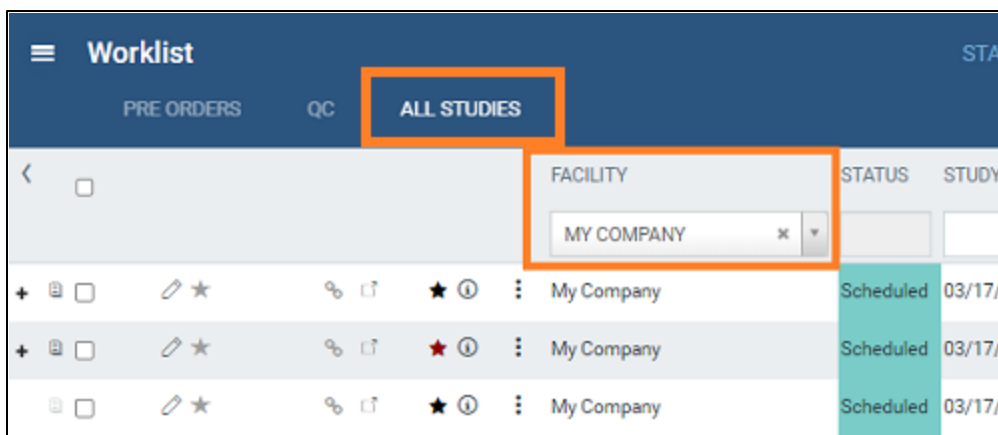
[Use local cache](#)

## 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.



Note: Avoid opening studies while caching is in progress. See [View the caching status](#).

See also:

[Search syntax](#)

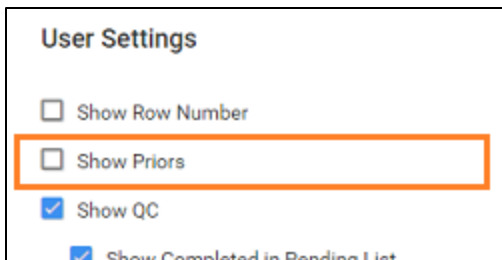
[View approved reports](#)

## View series and images

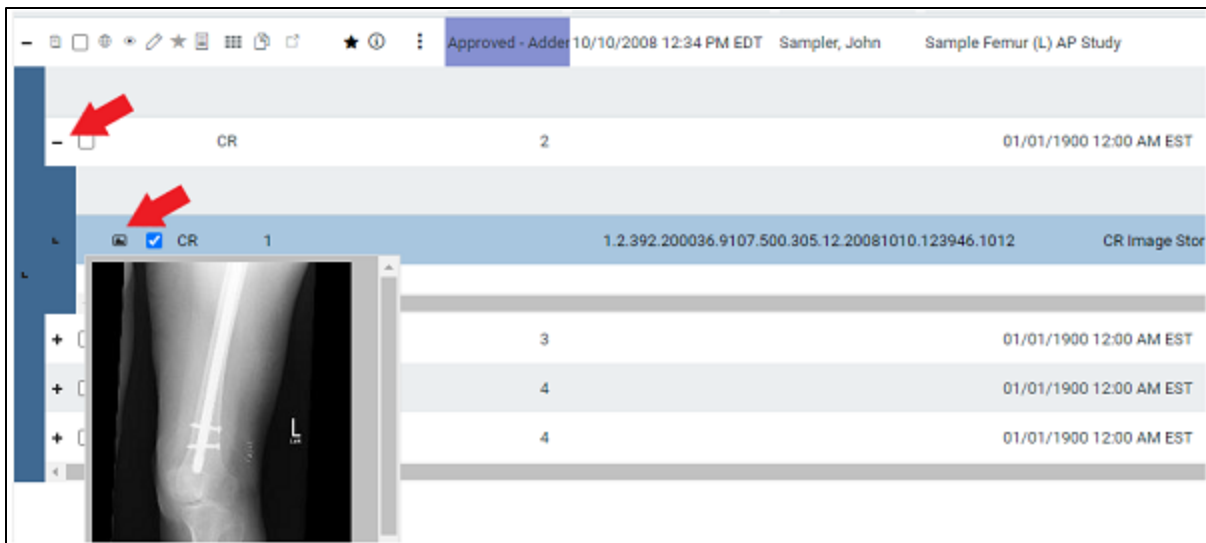
You can view series and images of any study in the worklist that includes them.

### 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.

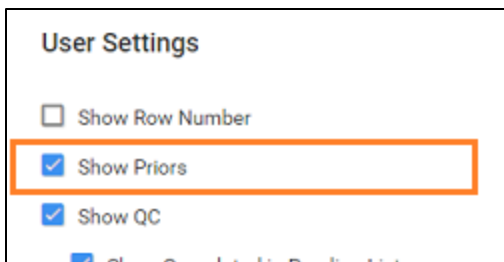
5. To open series and images in the viewer, double-click the main study.

## View priors

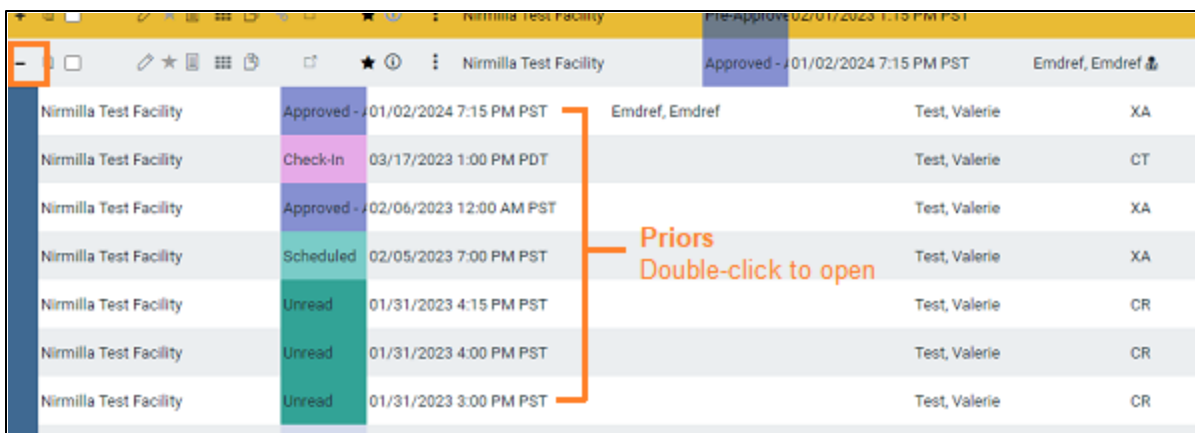
You can view the prior studies of any study in the worklist that includes them.

### 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:

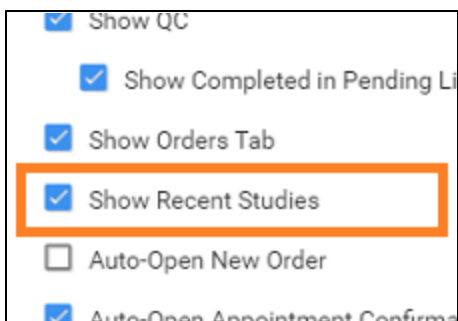
[View approved reports](#)

## View recent studies

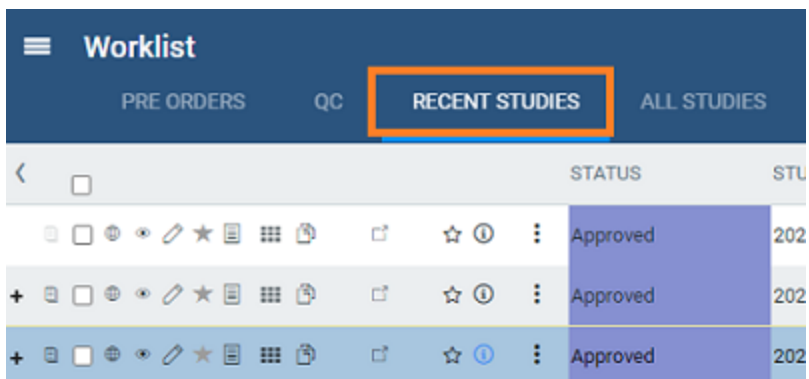
You can view a worklist filter containing the 25 studies that were most recently opened in the viewer. This makes it easy to find studies you viewed recently and want to reopen. Most standard worklist functions are available to you on the Recent Studies tab, but see "Details" below for exceptions.

### 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

You can open a pop-up window to display the contact information of a study's physician or ordering facility, including the physician's NPI number. The pop-up window is available on the worklist as shown in the figure, and also on the Edit Study screen, Eligibility/Estimation screen, Technologist screen, and the multi-panel.

### 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. A background color of the button indicates:<br>Images not yet cached<br>Some images cached<br>All images cached, unread |
|      | Opal Viewer        | Open the study in the Exa Client viewer (see <a href="#">Install Exa Client Viewer</a> ). Available for studies that contain images.                                                                      |
|      | Edit               | Opens the study for editing.                                                                                                                                                                              |
|      | View Transcription | Opens the dictation and transcription editor and displays any existing transcription. See "Dictation and transcription."                                                                                  |
|      | Multipanel         | Opens the study in the multi-panel, 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](#)

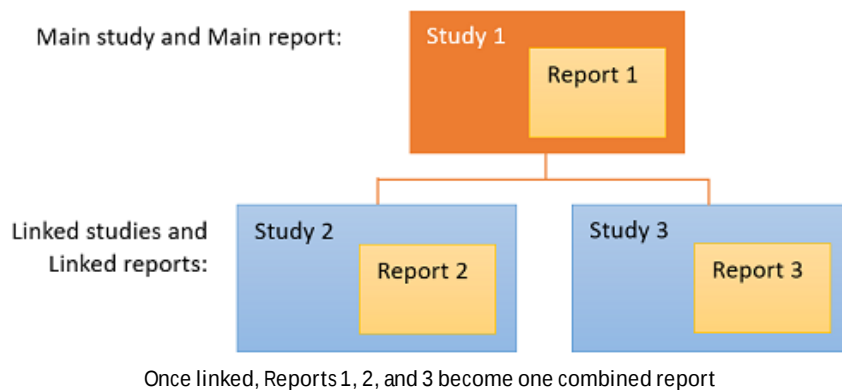
[Worklist shortcut menus](#)

[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. If an addendum is added to a linked report, it applies to all linked studies, and is available for viewing from any linked study.

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](#)).



### Which reports can be linked and unlinked?

- The reports must be from the same facility.
- Link reports any time before approval, but not after.
- Unlink reports at any time.

### What do linked reports look like?

Based on the merge fields you include in your report templates, Symmetry PACS 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:

**exa**

**Accession numbers of linked studies** (points to the Accession field)

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

**Study descriptions of linked studies** (points to the study list)

**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

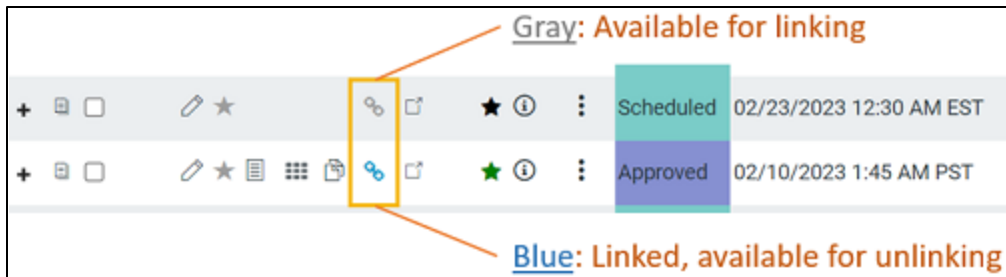
To link reports:



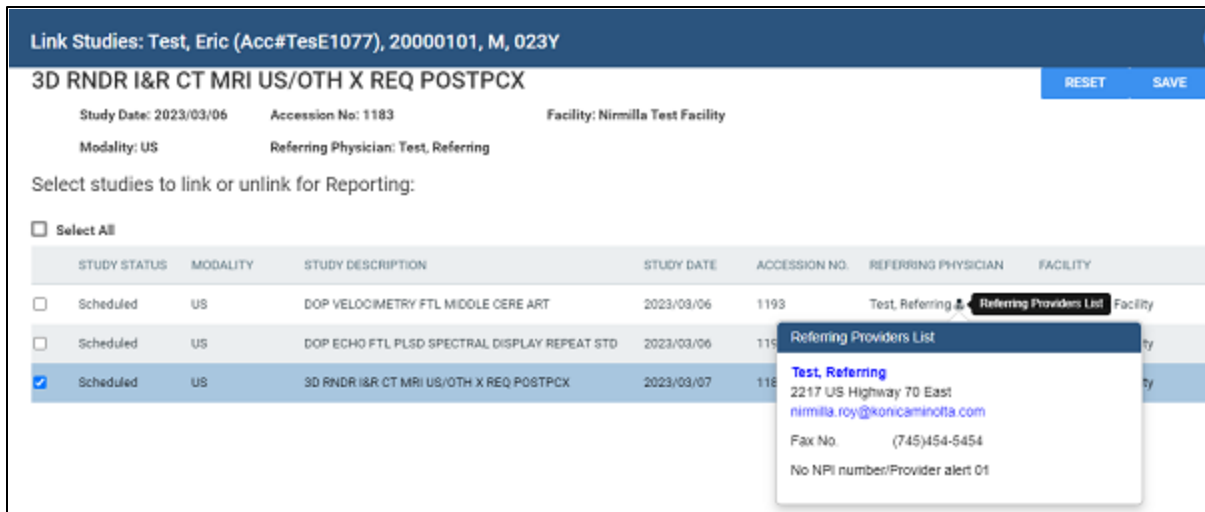
Prerequisite: Obtain the Link Report right from your administrator.

### Procedure

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



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



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

Result: The reports and studies are linked. Linked studies take on the status, Stat level, and other properties of the main study.

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.

Result: The studies are unlinked. The unlinked studies revert to the Unread status, their previous Stat levels, and other properties.

See also:

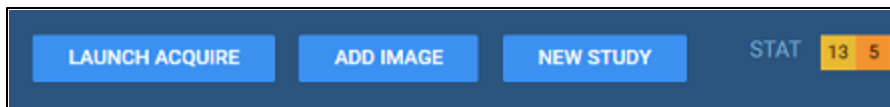
[About Linked Reporting](#)

[Link reports](#)

[Details on Linked Reporting](#)

## Work with Ultra Acquire

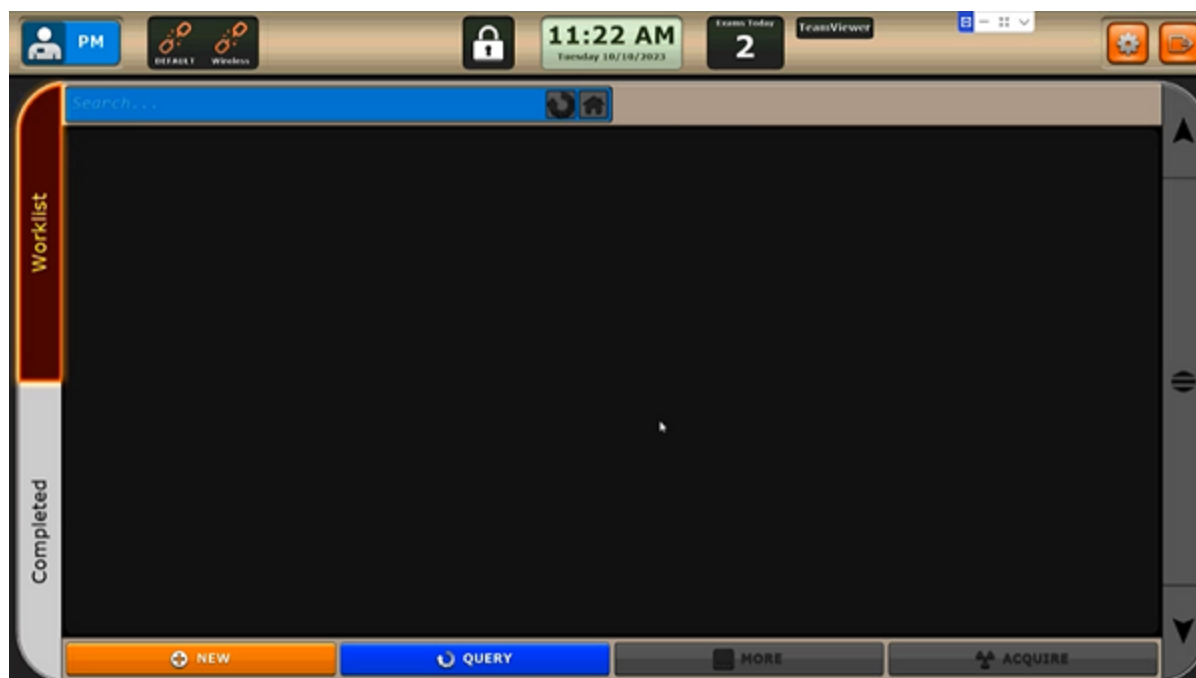
If your facility uses Ultra Acquire, you can access its functionality from the worklist. Three buttons are available as described below.



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

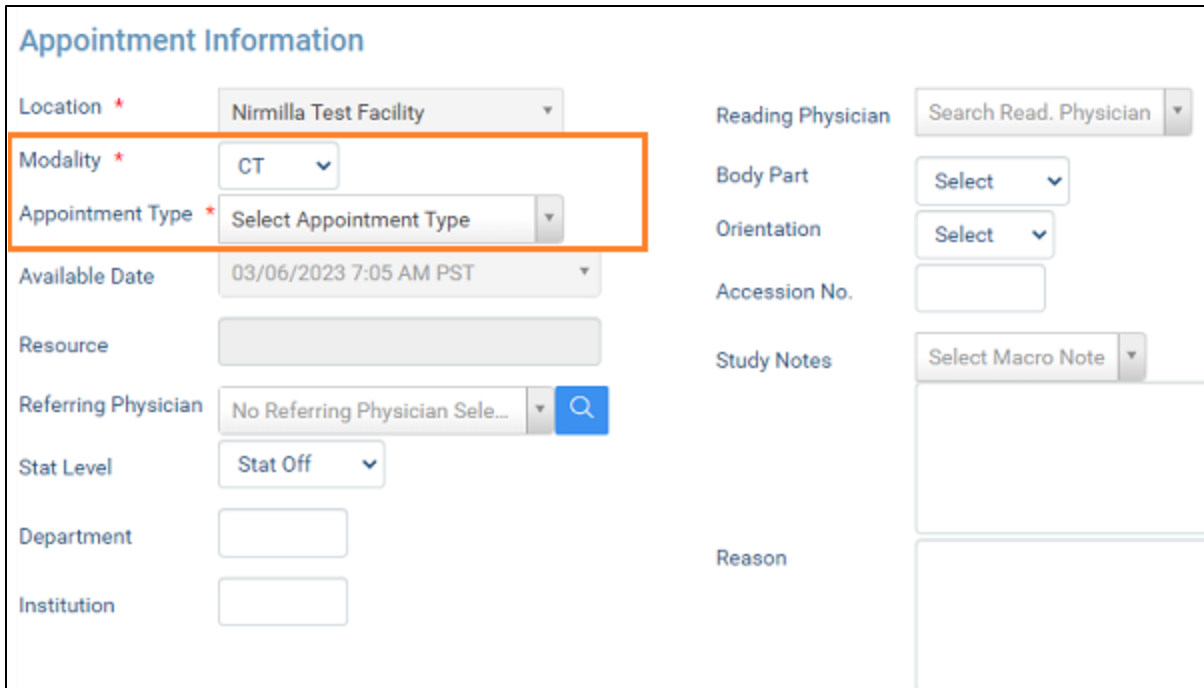
You can create a new study by using Ultra Acquire as follows.

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.

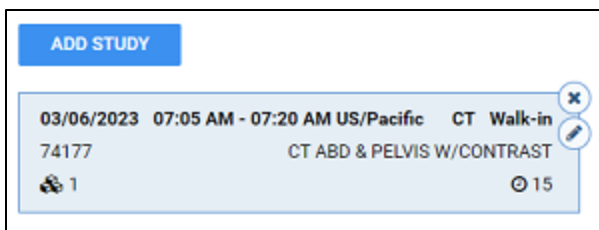
3. In the Starts With dropdown list, select a search mode in the dropdown list (Starts With, Ends With, or Contains).
4. Type all or part of a patient demographic in one or more of the boxes.  
Optional: If the Break the Glass checkbox appears, you can select it to search for confidential patient records.
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.



The image shows a web-based form titled "Appointment Information". The form is divided into two columns. The left column contains fields for Location (Nirmilla Test Facility), Modality (CT), Appointment Type (Select Appointment Type), Available Date (03/06/2023 7:05 AM PST), Resource, Referring Physician (No Referring Physician Sele...), Stat Level (Stat Off), Department, and Institution. The right column contains fields for Reading Physician (Search Read. Physician), Body Part (Select), Orientation (Select), Accession No., Study Notes (Select Macro Note), and Reason. The Modality and Appointment Type fields are highlighted with an orange border.

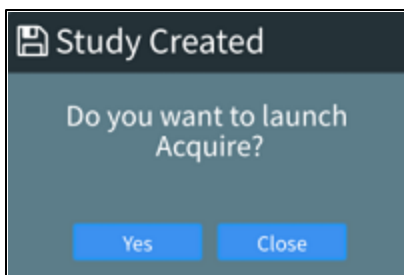
- b. Enter any other information as needed.
  - c. Select ADD STUDY.



The image shows a dialog box titled "ADD STUDY". It contains a list of study entries. The first entry is highlighted and shows the following details: 03/06/2023 07:05 AM - 07:20 AM US/Pacific CT Walk-in 74177 CT ABD & PELVIS W/CONTRAST. There is a small icon of a person and the number 1 next to the entry. The dialog has a close button (X) and a refresh button (circular arrow) in the top right corner.

8. Repeat to add more appointments as needed.
9. Select CREATE ORDER.

Result: The following dialog appears.



The image shows a dialog box titled "Study Created". It contains the text "Do you want to launch Acquire?". There are two buttons at the bottom: "Yes" and "Close".

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 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. |
| Study flags       | Color-coded ovals on the Study Flag worklist column that help you identify, filter, and sort studies.                                                                                                |

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](#)

## View the caching status

While a study is being cached locally or on a server, it may be totally or partially unavailable, or opening it may take time. Therefore, it is recommended to wait until caching of the study is complete before working with it. You can view the real-time caching status of studies on the worklist in two ways.

- Text formatting on the worklist
  - Caching in progress: *Italics*
  - Cached (ready to open): **Bold**

|       |          |         |          |                                 |
|-------|----------|---------|----------|---------------------------------|
| ☆ ⓘ ⋮ | Unread   | 362     | TesA1051 | Test, Ashley                    |
| ☆ ⓘ ⋮ | Unread   | 2271840 | NE878    | Radio, Button                   |
| ☆ ⓘ ⋮ | Unread   | 360     | TesA80   | Test, Andrew ← <b>Cached</b>    |
| ☆ ⓘ ⋮ | Approved | 359     | TesB101  | Test, Bill ← <b>In progress</b> |
| ☆ ⓘ ⋮ | Approved | 356     | TesA1047 | Test, Amy                       |
| ☆ ⓘ ⋮ | Unread   | 2239788 | RE3434   | Re, Mg ← <b>Uncached</b>        |

- Color of the globe button

When the globe  button for studies on the worklist is highlighted, this indicates the caching status as follows.



Current study and priors cached



Current study cached, priors in progress



Caching in progress



Some images could not be cached



Caching not started

See also:

[Create worklist filters for local cache](#)

[Use local cache](#)

## 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.
- Approved and Read studies and their priors are removed from local cache daily at 2AM.

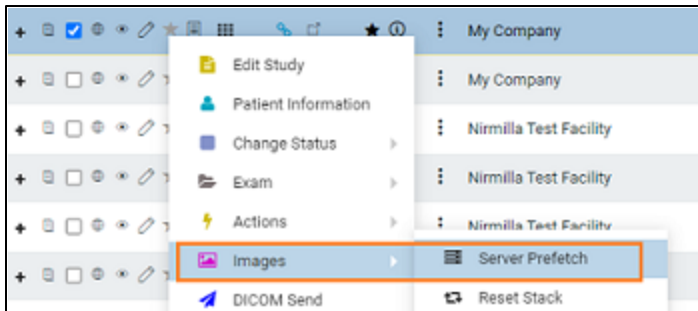


Prerequisite: [Install and configure local cache.](#)

## 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 (administrators)

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 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.

See also:

[Create worklist filters for local cache](#)

[View the caching status](#)

## Create worklist filters for local cache

You can configure an on call worklist filter that automatically sends matching studies to local cache. If you use multiple worklists, you can create a merged worklist filter to ensure that studies from all of your worklists are cached.

### Create an on call worklist filter

#### Procedure

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\lexa\cfg\localCache.cfg
5. Find the line for "oncall\_enabled" and set it as follows:  
"oncall\_enabled": "true",
6. Save and close the file.

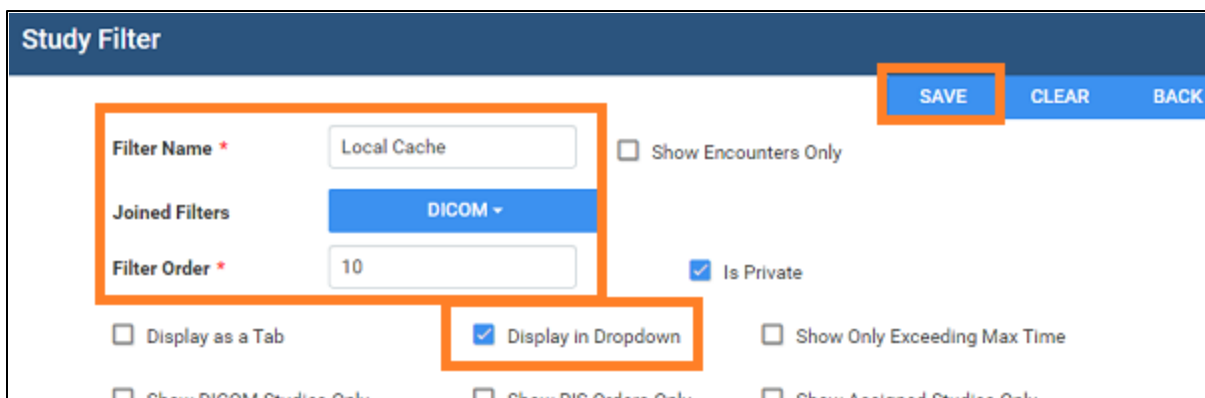
### Create a merged worklist filter

#### Procedure

1. On the worklist lower toolbar, select the filter  button, and then select ADD.



2. In the Study Filter dialog, enter the following settings.



| Setting             | Description                                           |
|---------------------|-------------------------------------------------------|
| Filter Name         | Name the filter                                       |
| Joined Filters      | Select filters you want to merge into this one        |
| Filter Order        | We recommend using a high number to reduce visibility |
| Display in Dropdown | Select                                                |

3. Select SAVE.
4. In [User Settings](#), in the Default Filter (Local Cache) dropdown list, select the worklist filter.

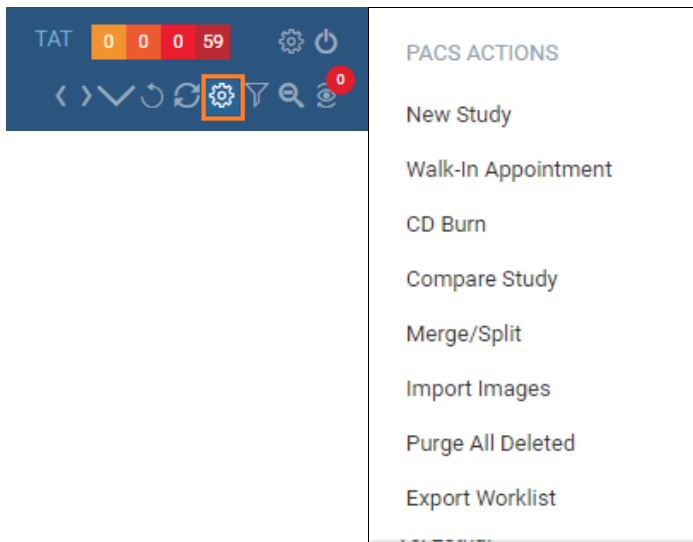
See also:

[Use local cache](#)

[View the caching status](#)

## 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](#)

[Compare studies](#)

[Merge or split studies](#)

[Import DICOM images](#)

[Purge all deleted](#)

[Export the worklist](#)

## 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 drive for sharing with other facilities, physicians, or patients. To burn images and series, see later in this topic.



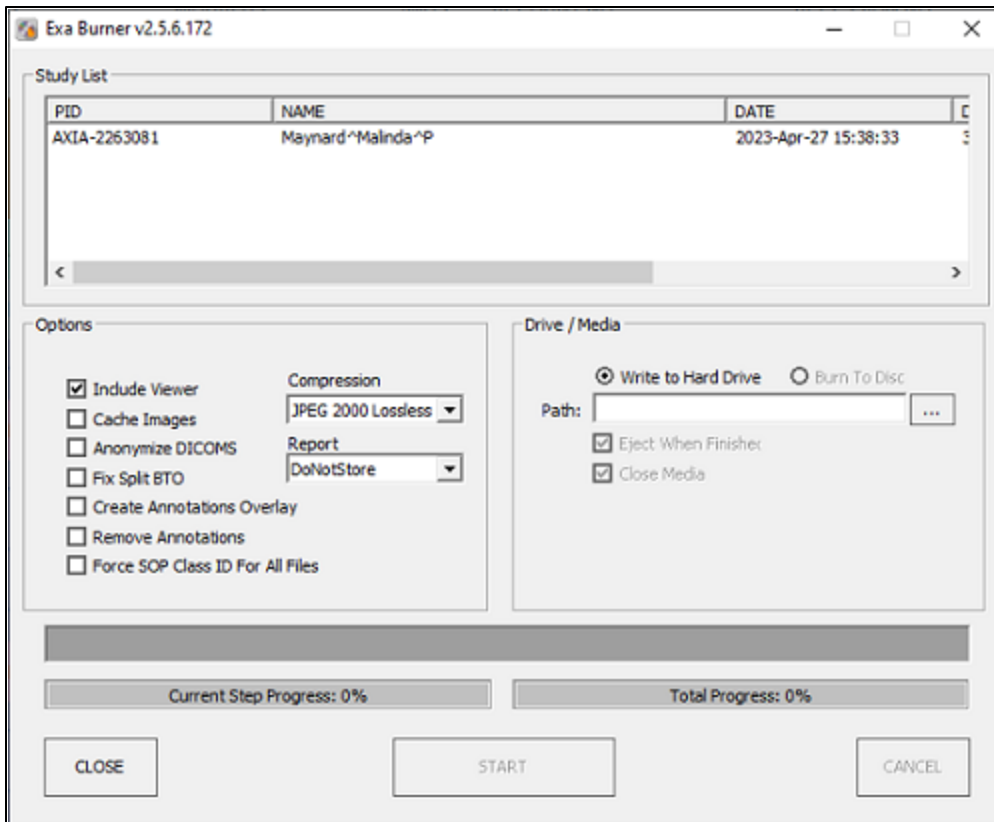
Note: Key image references are visible when opening the media at other sites, and when viewing in the Exa Client Viewer or Opal Light.



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              | Select whether to write to the hard drive or removable disc.                                       |
| Burn to Disc                     |                                                                                                    |
| 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.



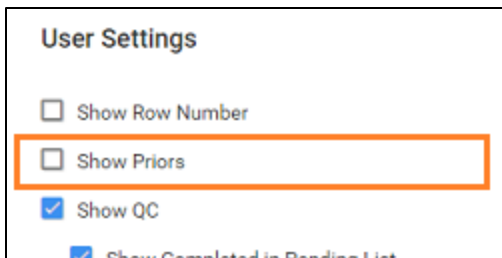
Note: If the connection is interrupted, burning will automatically resume when the connection is re-established.

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

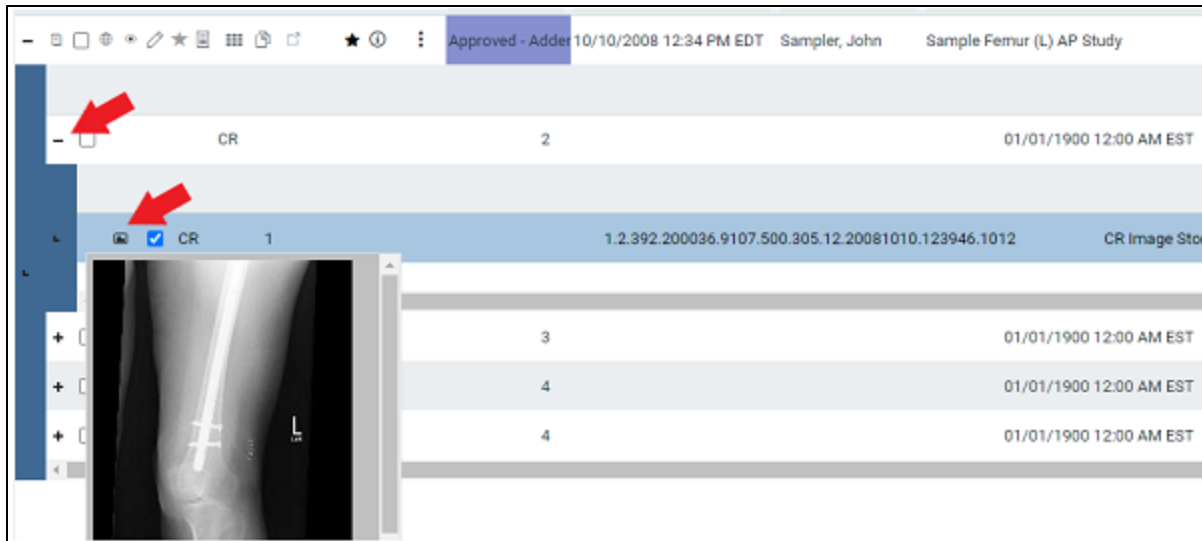
## Burn images and series

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

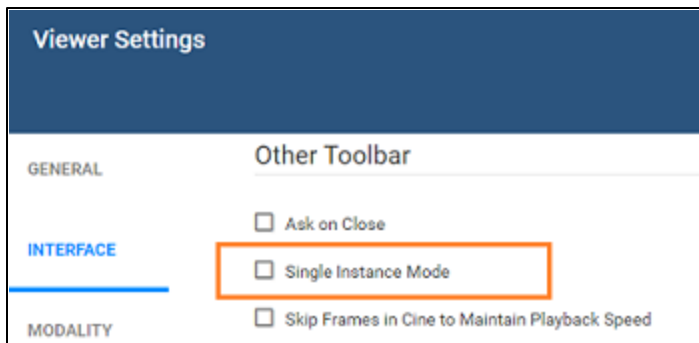
You can open two studies of the same patient in separate viewer screens for purposes of comparison.



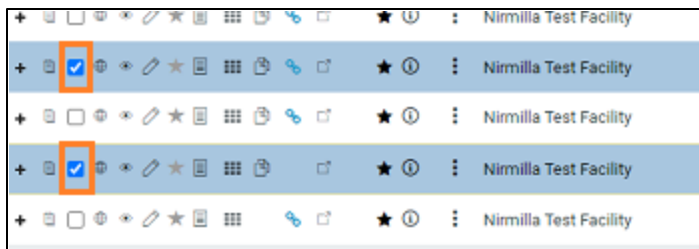
Prerequisite: Configure two or more monitors (see [Set up connected displays](#)).

### 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.

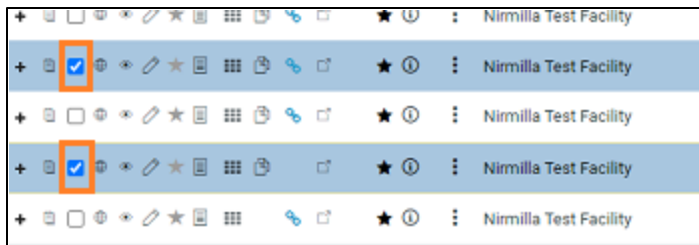
Result: The two studies open in the viewer.

## 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

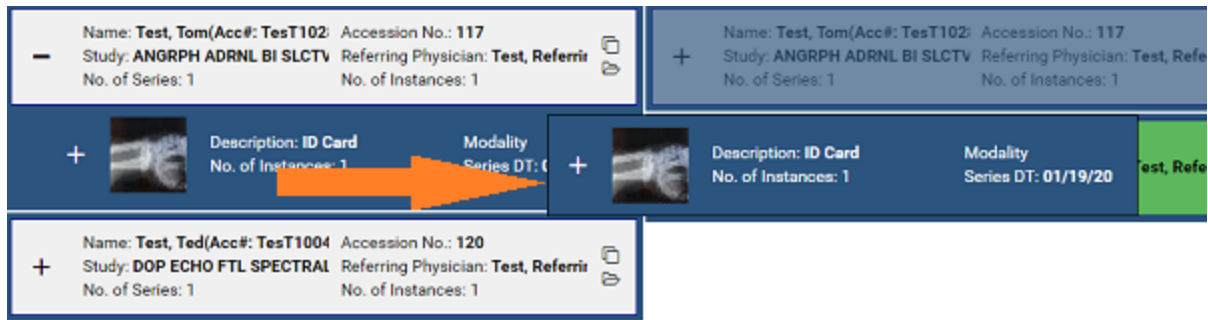
1. In the worklist, select two different studies that contain series.



2. On the [PACS Actions](#) menu, select Merge/Split.
3. Select the button to choose Move Selected or Copy Selected mode.



- in the Merge/Split From column, select the plus sign of the *first* study (the one on top) to reveal its series.
- 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.

- Select SAVE CHANGES.

### Move or copy all images in one series to a series in another study

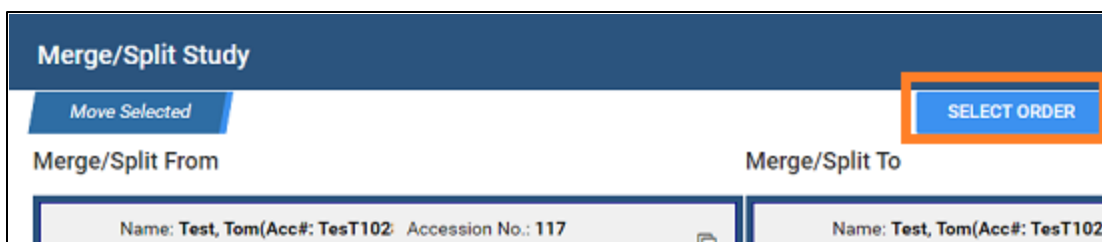
- In the Merge/Split To column, select the plus sign of a study to reveal its series.
- Drag a series in the left column onto a series in the right column.
- Select SAVE CHANGES.

### 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

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



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

| Merge/Split Study |                 |                 |            |                       |                           |
|-------------------|-----------------|-----------------|------------|-----------------------|---------------------------|
| RIS Orders        |                 |                 |            |                       |                           |
|                   | STUDY DATE      | PATIENT NAME    | DOB        | STUDY DESCRIPTION     | ACCESSION NO. ACCOUNT NO. |
| SELECT            | 03/17/2023 4:00 | P Test, Valerie | 01/01/2000 | CT ABD & PELVIS V1371 | TesV1001                  |
| SELECT            | 03/17/2023 5:10 | P Test, Andrew  | 01/01/2000 | DOP VELOCIMETR' 1370  | TesA83                    |
| SELECT            | 03/17/2023 5:00 | P Test, Andrew  | 01/01/2000 | BONE AGE STUDIE 1369  | TesA83                    |

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 Symmetry PACS.

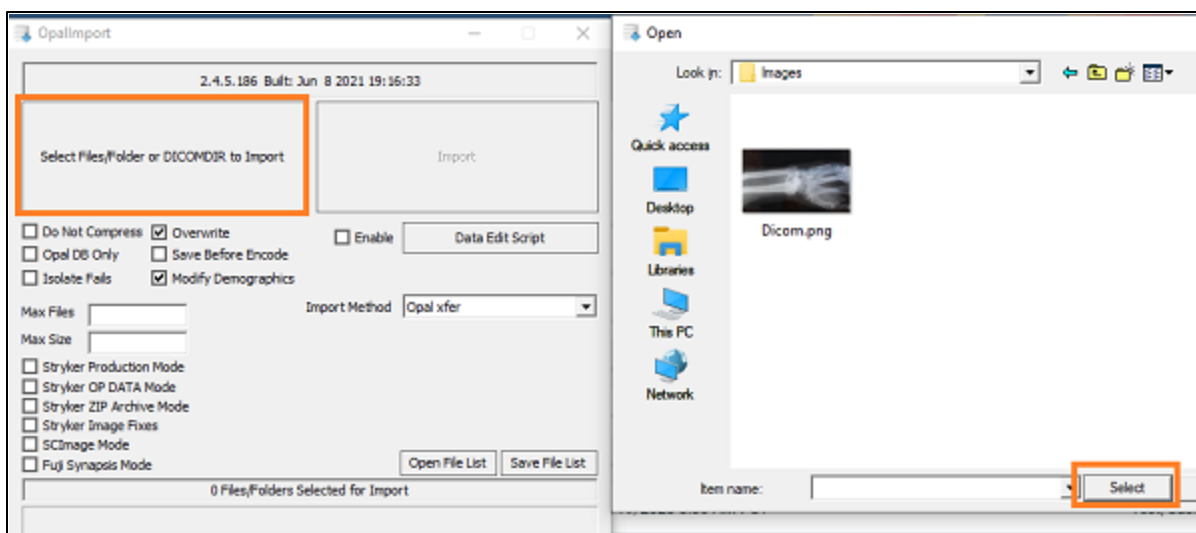


### Prerequisites:

- [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.                                                                  |

| Setting   | Description                               |
|-----------|-------------------------------------------|
| 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

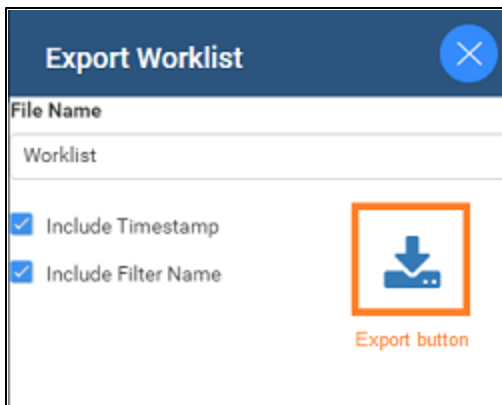
You can export the worklist to a CSV file.



Note: Only the studies currently showing on the worklist are exported. To export additional studies, scroll to the bottom of the worklist to display additional studies.

### 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).

[Require document review](#)

[Modify or reset the order authorization days](#)

[Assign a study to users](#)

[Add studies to the merge queue](#)

[Create a teaching study](#)

[Reset a study](#)

[Delete a study](#)

[Download approved reports](#)

[Undelete or purge a deleted study](#)

[Copy the API URL](#)

[Reset a stack](#)

[Lock and unlock a study](#)

[Edit or view a patient, study, or order](#)

[Change the study status](#)

[DICOM-send studies, series, or images](#)

[Send an approved report via Opal](#)

[Send an approved report in a fax or email](#)

[View and export audit log entries](#)

[About linking patients](#)

[Link patients](#)

[Attach \(upload, scan\) non-DICOM documents](#)

[Attach \(upload, scan\) DICOM documents](#)

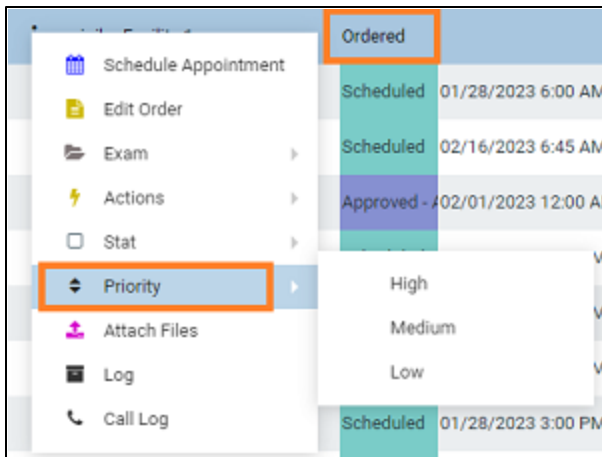
[Open the call log](#)

## 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

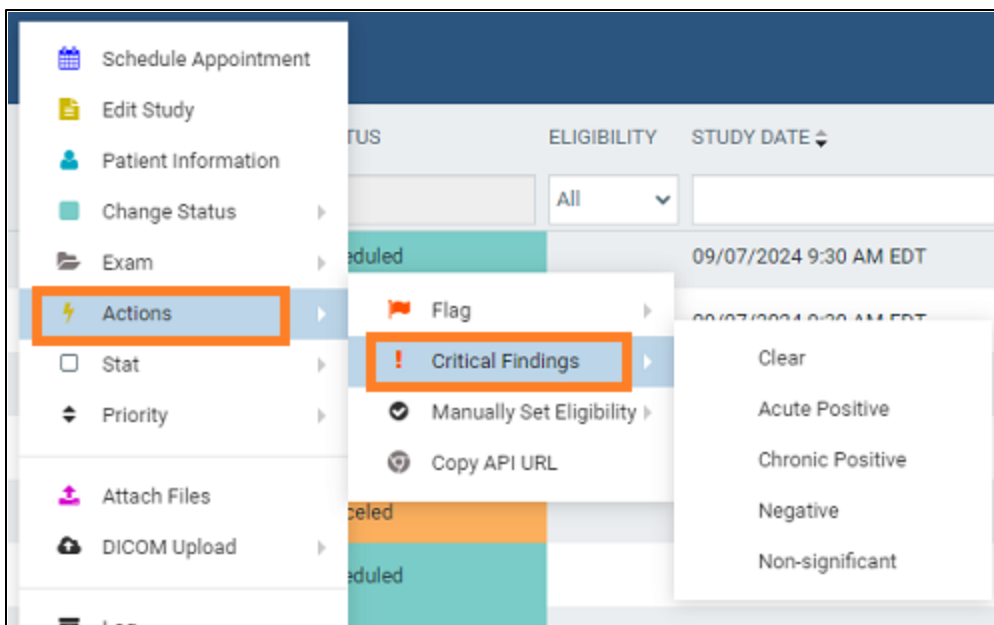
You can assign critical findings to an order or study (for example, “Acute Positive”), and you can clear any existing critical findings.



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.

- To clear existing findings, select Clear.

See also:

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

## Flag an order or study

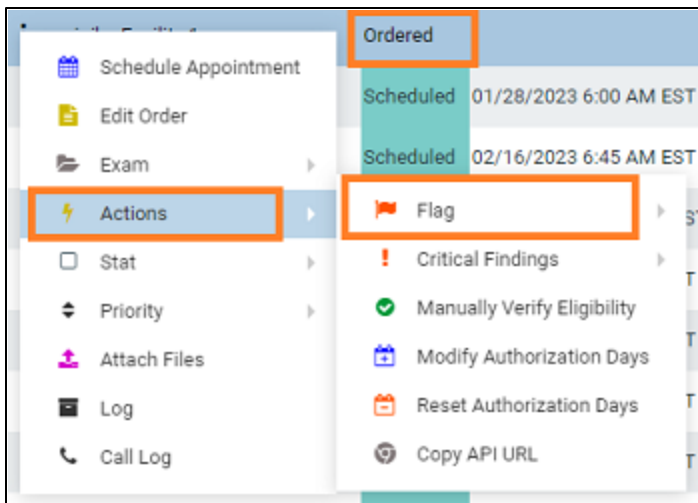
You can flag an order or study in the worklist as being of special consideration. After flagging orders or studies, you can filter the worklist by those flags.



Prerequisite: [Create a study flag](#)

### Procedure

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



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

Result: The selected flags appear in the STUDY FLAG column.

| STATUS    | STUDY DATE              | PATIENT                        | STUDY FLAG | FACILITY                   |
|-----------|-------------------------|--------------------------------|------------|----------------------------|
|           |                         |                                |            | ALL                        |
| Scheduled | 06/16/2024 2:00 PM CDT  | Mabbzipatient11, Mabbzipatient |            | Auto Saint Clair Facility1 |
| Scheduled | 06/12/2024 2:00 PM PDT  | Rspatient114, Rspatientf14     |            | Auto Los Angeles Facility1 |
| Scheduled | 06/12/2024 12:00 AM EDT | Eapsatient15, Eapsatient15     | A B C      | St Johns Hospital          |
| Check-In  | 06/12/2024 4:00 PM EDT  | Mabbfspatient13, Mabbfspatient |            | Auto Westchester Facility1 |

See also:

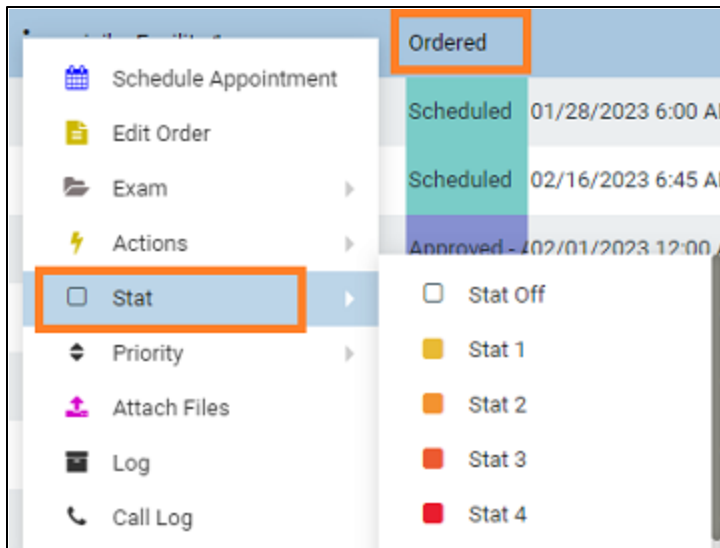
[About drawing attention to orders and studies](#)

## 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.

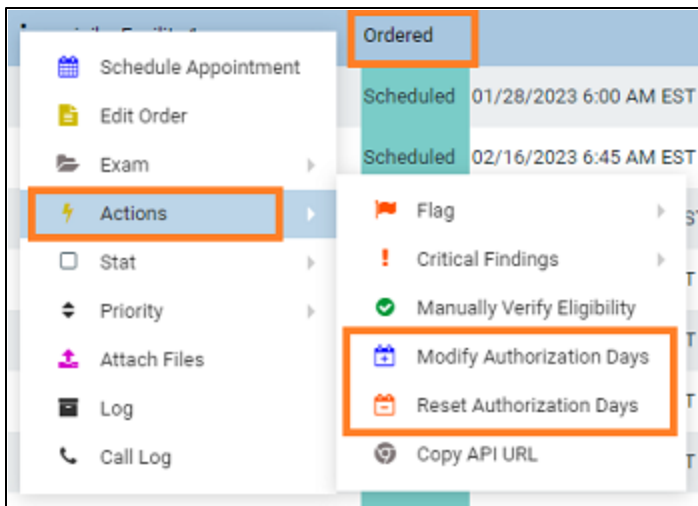
## Modify or reset the order authorization days

You can quickly change the number of days specified in an authorization rule associated with a study or preorder in Ordered status. Specifically, 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.

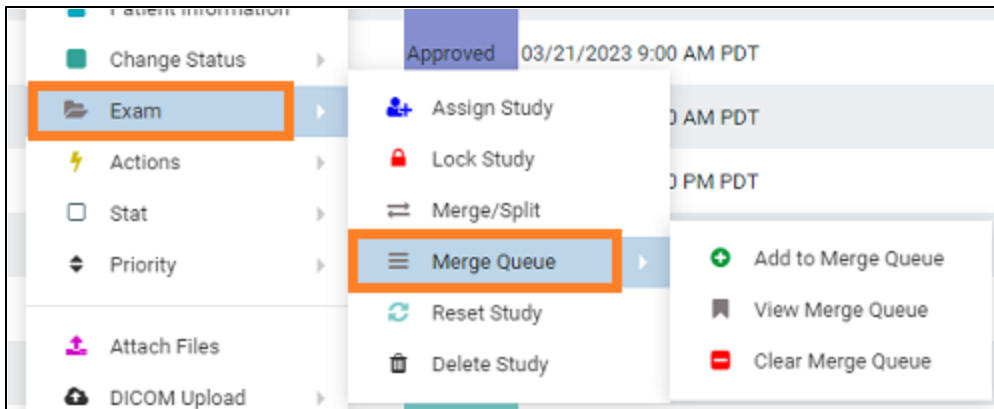
3. Optional. In the Assign to Radiologist dropdown list, select a radiologist as the referring provider.
4. Select SAVE.

## 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.



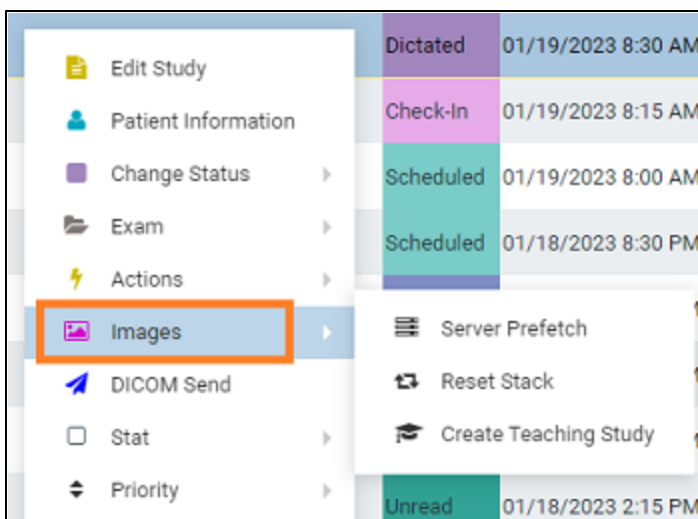
3. On the Merge Queue sub-menu, select Add to Merge Queue.
4. Repeat the previous step for all studies that you want to work with.
5. Right-click one of the studies that you added to the merge queue, hover over Exam, hover over Merge Queue, and then select View Merge Queue.

## 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.



- 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).

**Teaching Study**

AE Title  
Select

☐ Remove OpalRAD Annotations (2111 Group)

CREATE TEACHING STUDY CANCEL

| Field                | Current Value   | New Value           |
|----------------------|-----------------|---------------------|
| Accession No.        | 32464510000900  | poq8TewlepFRCIVZ    |
| Patient ID           | ANA8989         | ZHTCTdgymfWKikf7    |
| Patient Name         | Ktm*Dude***     | Teaching_OT,CR_1488 |
| Study Description    | XR CHEST 1 VIEW | XR CHEST 1 VIEW     |
| Patient Gender       | F               | Other               |
| Referring Phys. Name |                 | [No Value]          |
| Institution Name     |                 | [No Value]          |

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

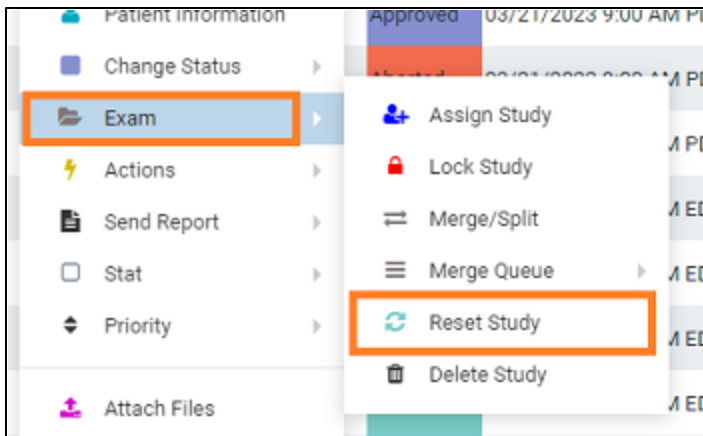
- Select CREATE TEACHING STUDY.

## Reset a study

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

### Procedure

- [Worklist](#) > right-click a study > Reset Study.



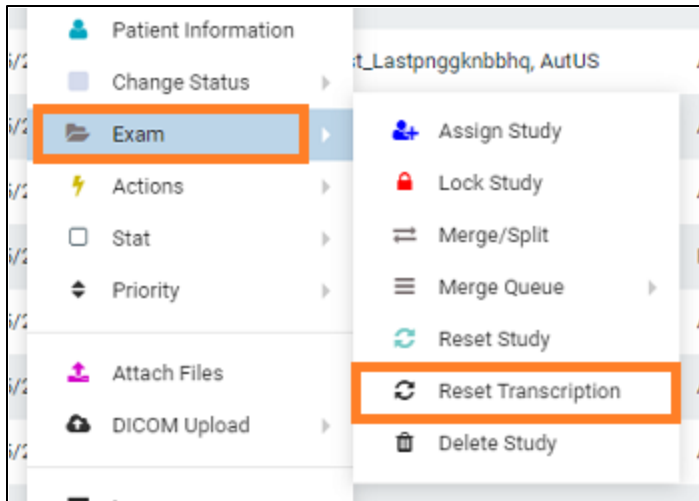
2. In the confirmation dialog, select YES.

## Reset a transcription

If the status of a study is “Transcribed” you can reset the transcription, which means to delete the transcription and return the study to the Unread status. If any reports are linked to the study, their statuses also revert to Unread.

### Procedure

1. [Worklist](#) > right-click a study > Reset Transcription.



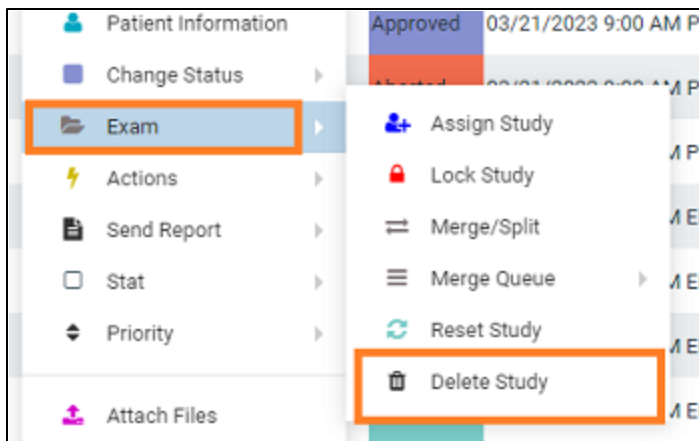
2. In the confirmation dialog, select YES.

## Delete a study

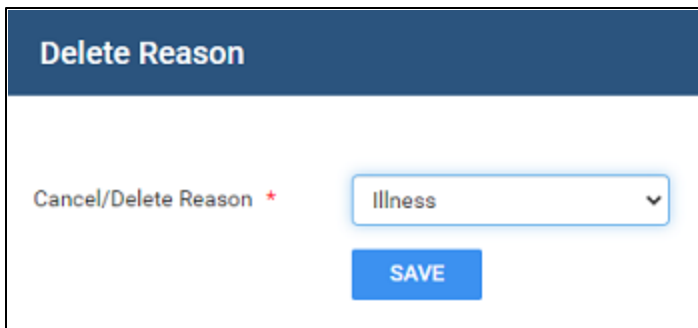
When you delete a study it remains on the worklist but Symmetry PACS applies strikethrough text formatting to it and disables access. You can undelete or purge a deleted study.

### Procedure

1. [Worklist](#) > right-click a study > Exam > Delete Study.



2. In the confirmation dialog, select YES.



The image shows a dialog box titled "Delete Reason". It has a dark blue header with the title in white. Below the header, there is a label "Cancel/Delete Reason" followed by a red asterisk. To the right of the label is a dropdown menu currently showing "Illness". Below the dropdown menu is a blue button labeled "SAVE".

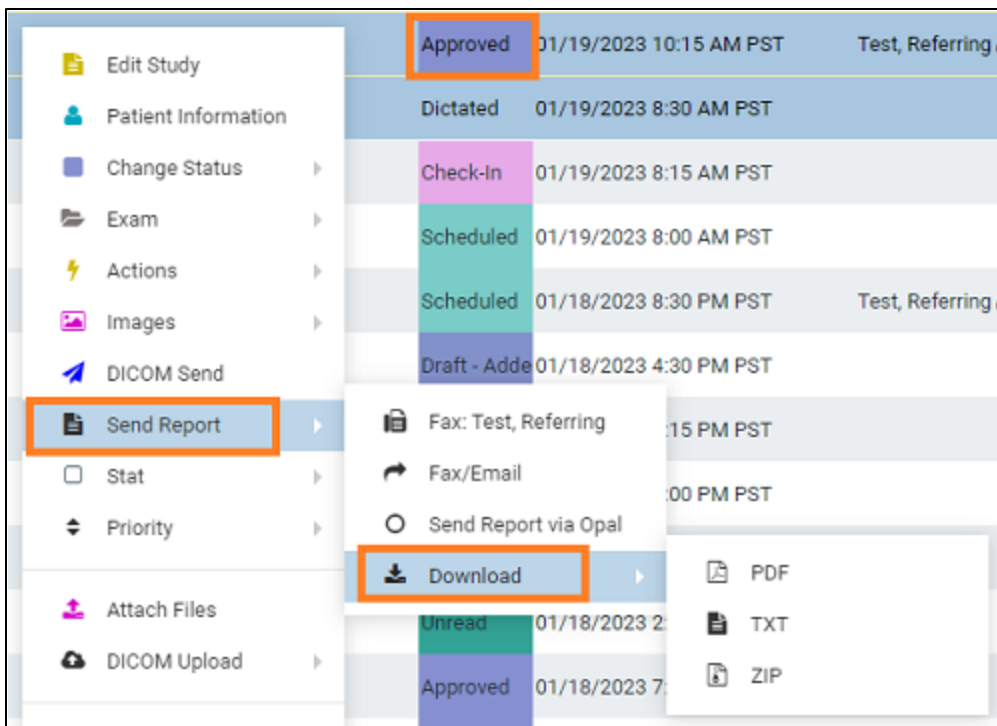
3. In the Delete Reason dialog, select a reason
4. Select SAVE.

## 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.



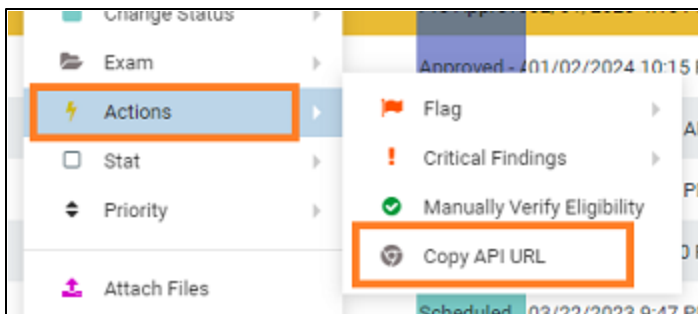
- To undelete, select Restore Study.
  - To purge a deleted study, on the study shortcut menu, select Purge (Permanently), and then select OK.
2. To purge all deleted studies at once, on the [PACS Actions](#) menu, select Purge All Deleted.

## 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.

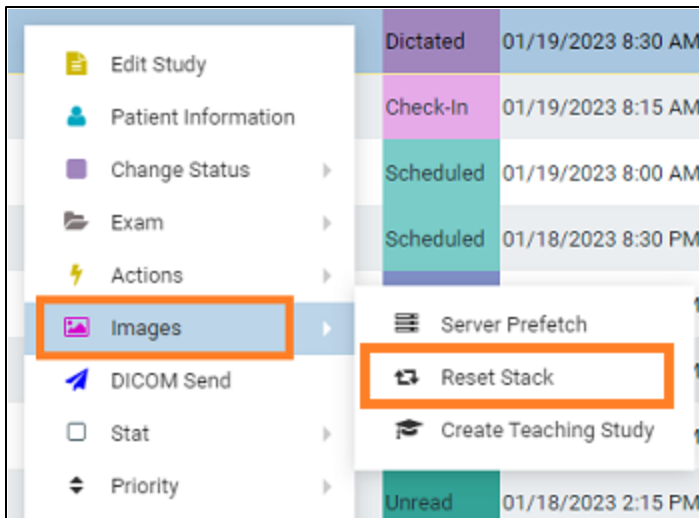
2. Press Ctrl + C to copy, and then select OK.

## 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.

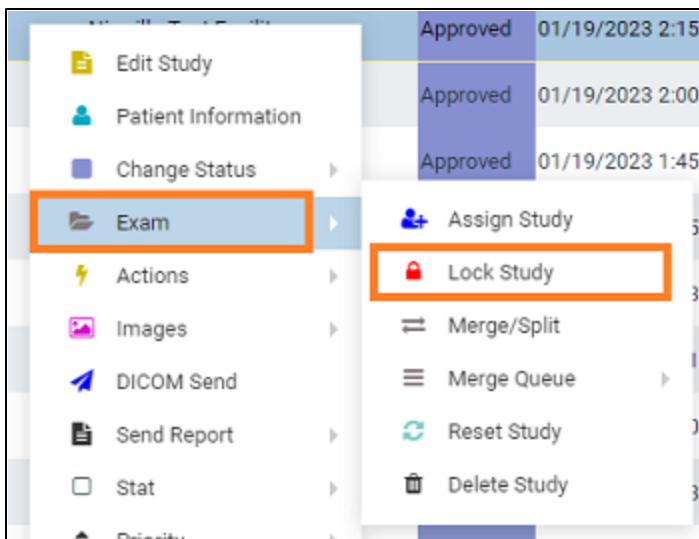
## Lock and unlock a study

When you open a study in the viewer, Symmetry PACS automatically "locks" it by adding the lock  symbol to the worklist study row. A study lock does not prevent subsequent users from opening the study, but alerts them that it is open by the original user, and prevents them from using transcription. Note that if a user opens a study from the Attorney, Physician, or Patient portal, the study does *not* become locked in Symmetry PACS.

You can also manually lock a study, and unlock a study that an original user previously locked.

### Procedure

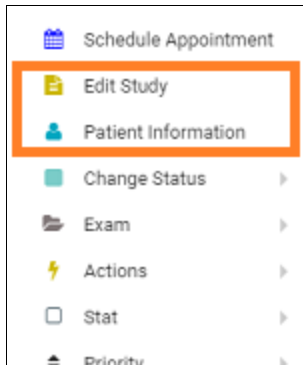
1. [Worklist](#) > right-click a study > Exam > Lock Study.



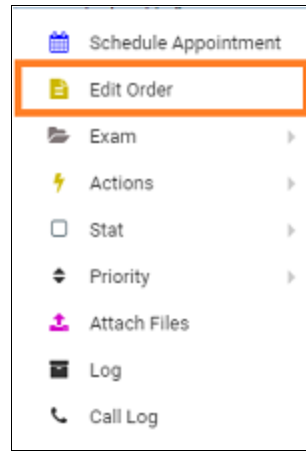
2. To unlock a locked study, on the study shortcut menu, hover over Exam > Unlock Study.

## 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

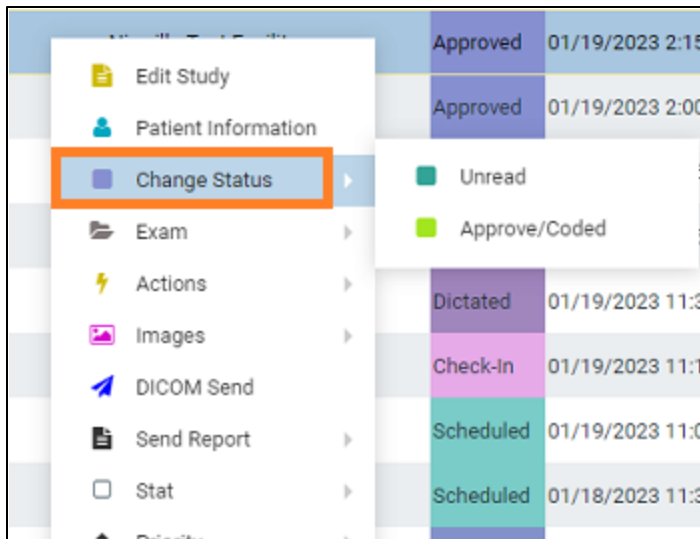
See also:

[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

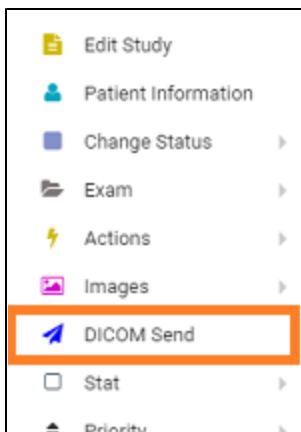
You can DICOM-send studies, series, or images to PACS or another destination. You can include any approved reports in the study, but note that the report status (such as Approved or Transcribed) is not sent. To send an approved report with its status, [Send an approved report via Opal](#).



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.

| ACCESSION NO. | STUDY DATE          | MODALITY | STUDY DESCRIPTION   | ACCOUNT NO. | PATIENT     | DOB        | REFERRING PHYSICIAN       |
|---------------|---------------------|----------|---------------------|-------------|-------------|------------|---------------------------|
| 023H16926805  | 02/08/2023 7:00 ACT | PI       | SKULL TO THIGH W/CT | 62589       | Bill, Suv J | 03/03/1938 | Bassetti, Dennis Randolph |

☐ Include Approved Report

|                                     |                           |
|-------------------------------------|---------------------------|
| <input checked="" type="checkbox"/> | EXA-V32-V32 (EXA-V32-V32) |
| <input type="checkbox"/>            | OPAL_32_33 (OPAL_32_33)   |
| <input type="checkbox"/>            | opaLv32_v33 (opaLv32_v32) |

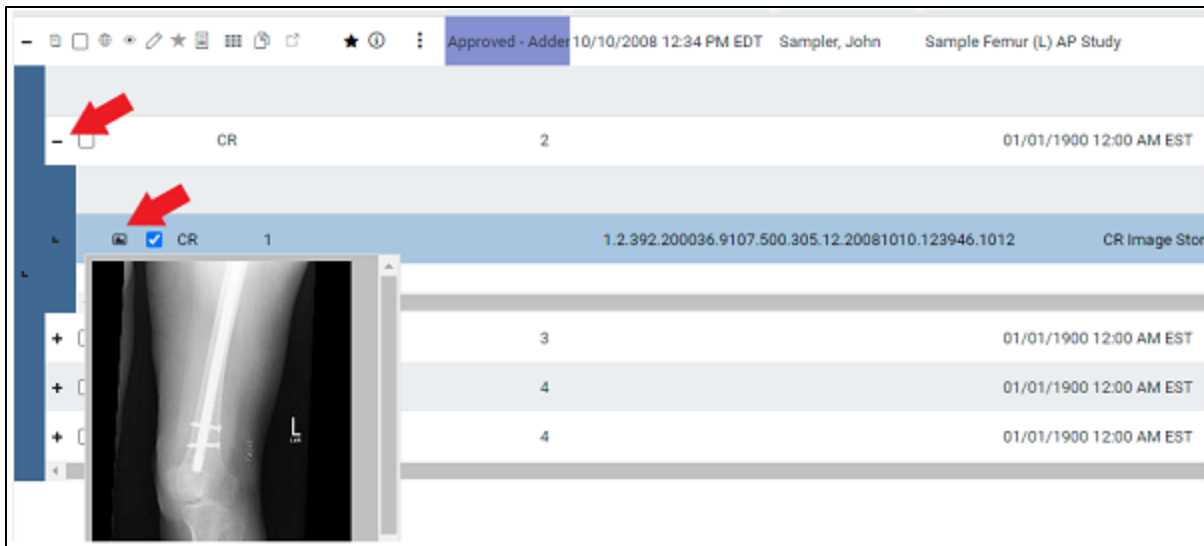
3. In the Priority dropdown list, select a priority.
4. Select destinations in the list, and then select SEND TO SELECTED.

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

- Optional. To manage in-process send jobs, see [Manage jobs in the transfer and SR queues](#).

### Send series or images

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



- Select the checkboxes of the images or series to send.
- Right-click and select DICOM Send.
- In the Send Study dialog, in the Priority dropdown list, select a priority.
- Select the send destinations in the list, and then select SEND TO SELECTED.
- Optional: To send any attached approved reports, select the Include Approved Report checkbox.
- 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).

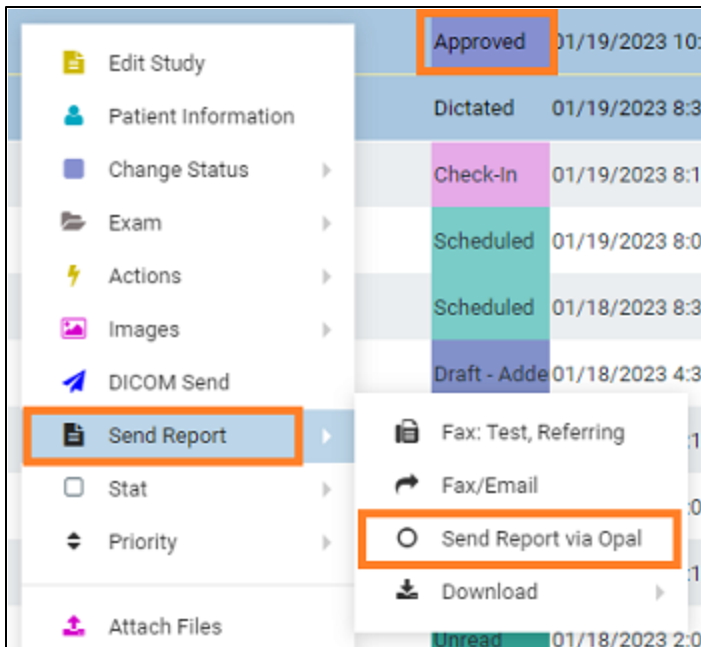


#### Prerequisites:

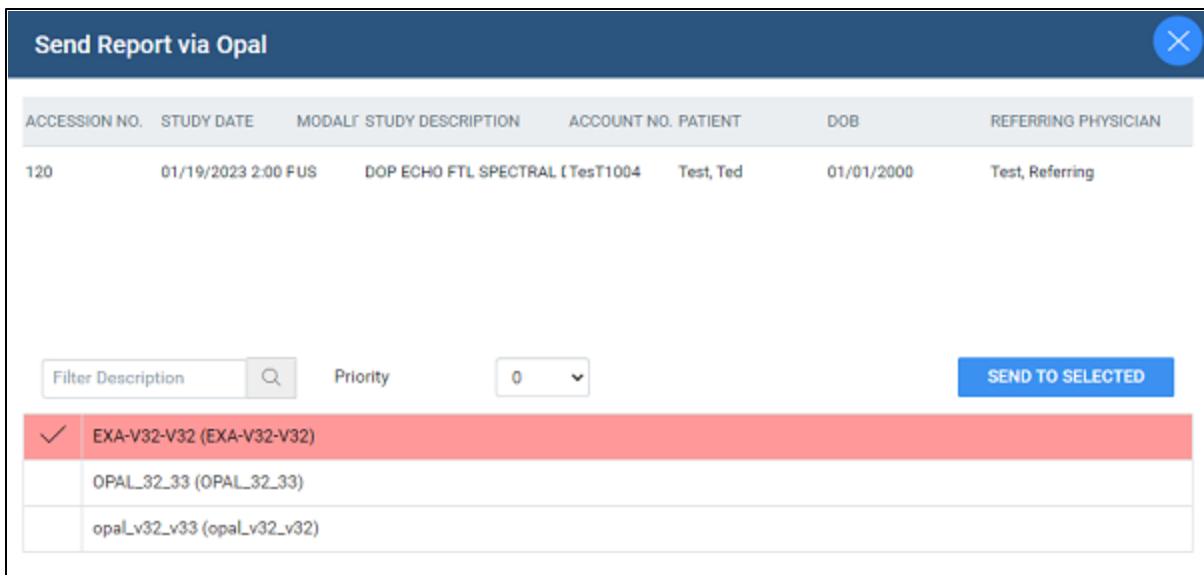
- Configure the referring physician on the sending server (your Symmetry PACS server) and receiving server. You may need to contact the receiving facility to confirm.
- [Install OPAL tools](#).

#### Procedure

- [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.



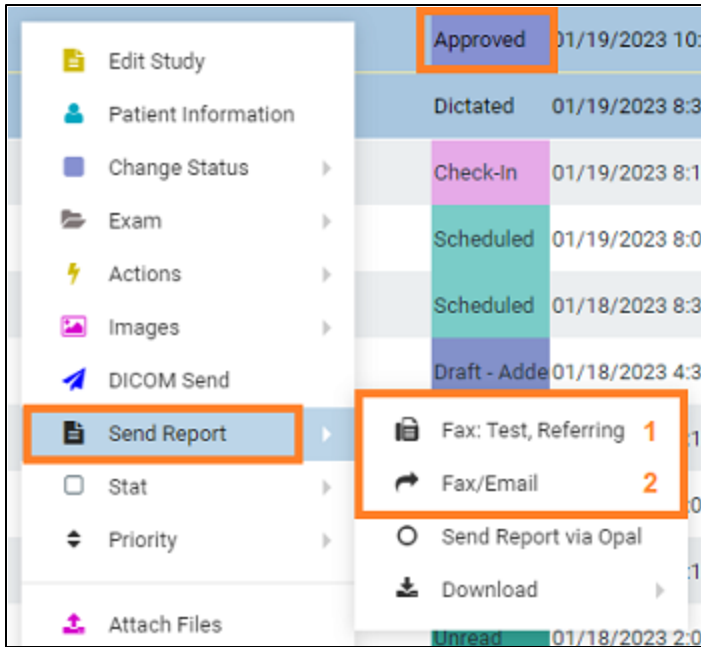
4. In the Priority dropdown list, select a priority.
5. Select send destinations in the list.
6. Select SEND TO SELECTED, or SEND TO ALL.

## Send an approved report in a fax or email

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

### Procedure

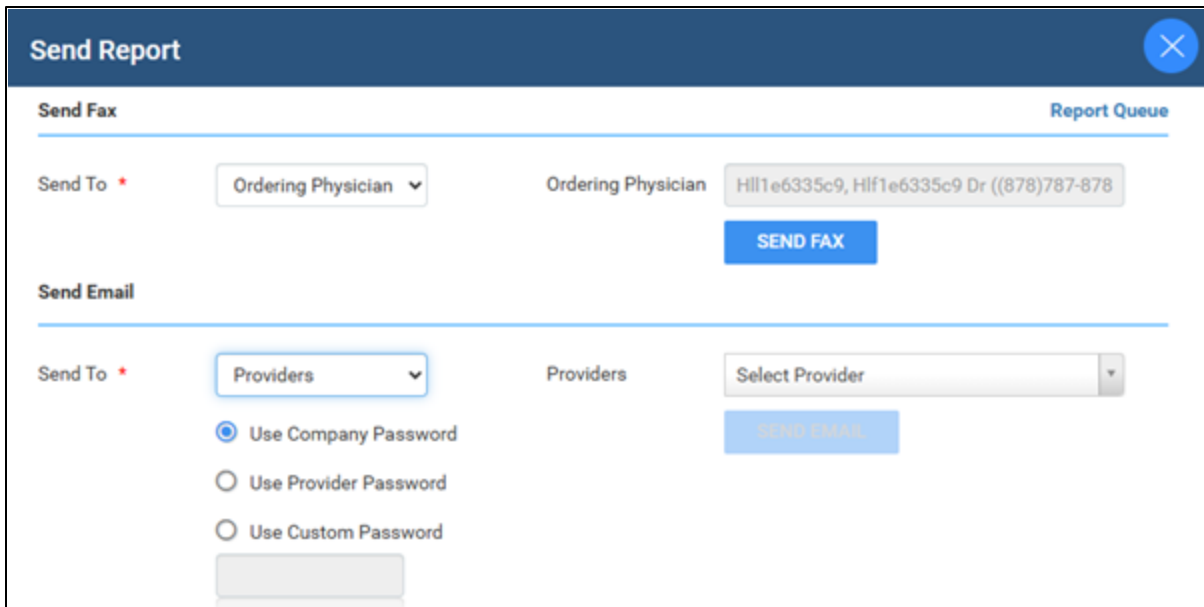
1. [Worklist](#) > right-click an approved study > Send Report.



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 password options and then select the SEND FAX and/or SEND EMAIL button.



The **Send Report** dialog box is divided into two sections: **Send Fax** and **Send Email**. The **Send Fax** section includes a **Send To \*** dropdown menu set to **Ordering Physician**, a text field for the **Ordering Physician** containing the ID **Hll1e6335c9** and name **Hll1e6335c9 Dr ((878)787-878)**, and a **SEND FAX** button. The **Send Email** section includes a **Send To \*** dropdown menu set to **Providers**, a **Providers** text field with a **Select Provider** dropdown, and three radio button options: **Use Company Password** (selected), **Use Provider Password**, and **Use Custom Password**. A **SEND EMAIL** button is also present. A **Report Queue** link is in the top right corner.

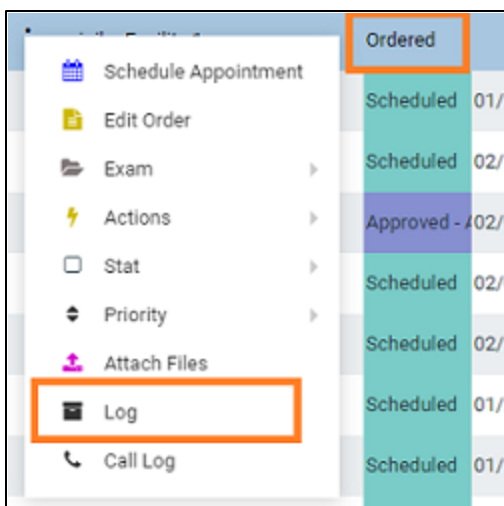
4. Optional. Repeat the previous step to send to additional recipients.
5. Optional. To open the report or fax queue, select Report Queue or Fax Queue in the upper-right corner of the dialog.

## 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.

| LOGGED DATE             | SCREEN              | USER       | LOG DESCRIPTION                                    |
|-------------------------|---------------------|------------|----------------------------------------------------|
| 02/10/2023 12:00 PM EST | Order Forms         | ViztekPacs | Add New Order form (Test) created                  |
| 02/10/2023 12:00 PM EST | Patient Alerts      | ViztekPacs | Inserted patient alert.                            |
| 02/10/2023 12:00 PM EST | Patient Alerts      | ViztekPacs | Inserted patient alert.                            |
| 02/10/2023 11:55 AM EST | Study Notes         | ViztekPacs | Created study note.                                |
| 02/10/2023 11:53 AM EST | Referring Providers | ViztekPacs | Add New Referring Provider (Test, Referring) added |

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](#)).



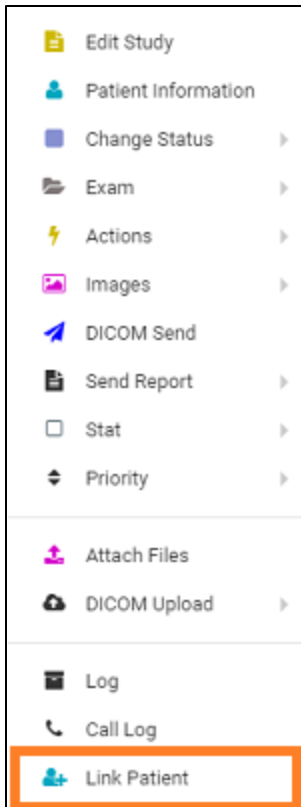
Caution: Linking an external patient record to an internal one deletes the external record.



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.

| Main Account No | Alt Account No | Issuer | Merge Status |
|-----------------|----------------|--------|--------------|
|-----------------|----------------|--------|--------------|

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

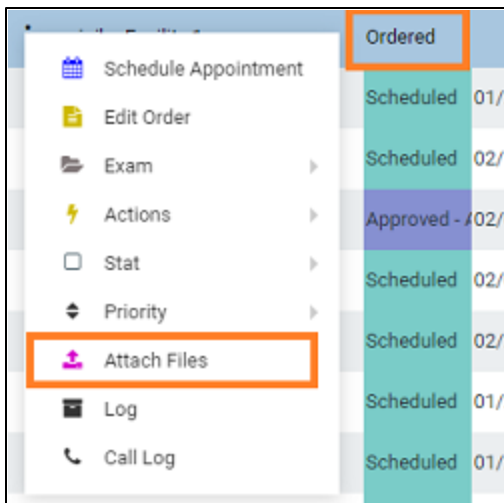
1. Choose one of the following:

From the worklist

- [Worklist](#) > right-click an order or study > Attach Files.
- [Worklist](#) > [Edit Study screen](#) > DOCUMENTS.

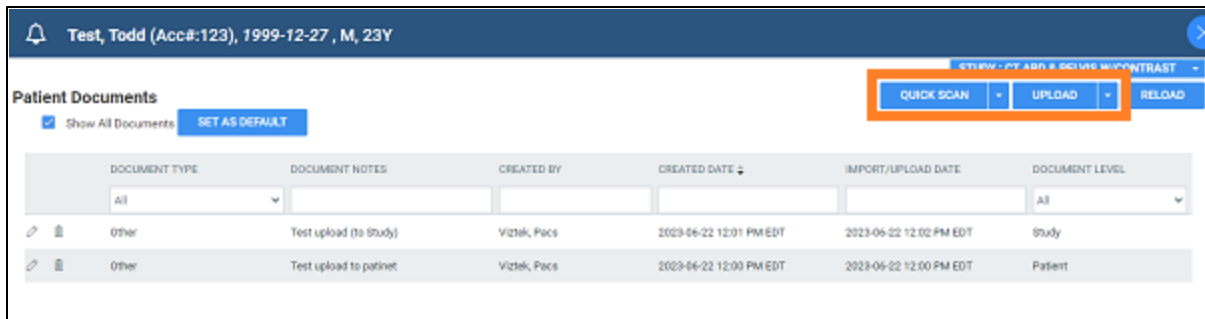
From the schedule book

- [SCHEDULE](#) > right-click an appointment block > Attach Files.

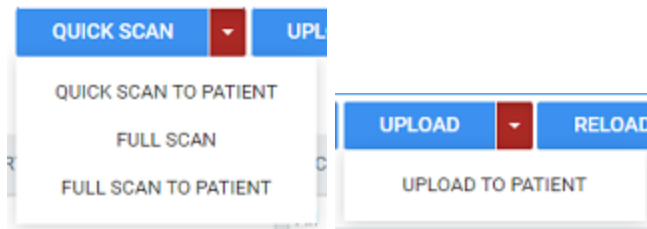


Example: Using the worklist study row shortcut menu

Result: The Patient Documents screen appears:



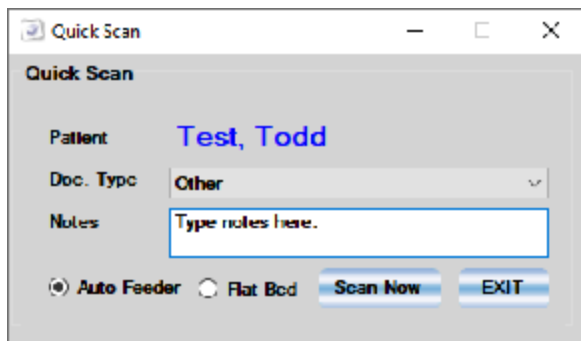
2. In the upper-right, select one of the following options.



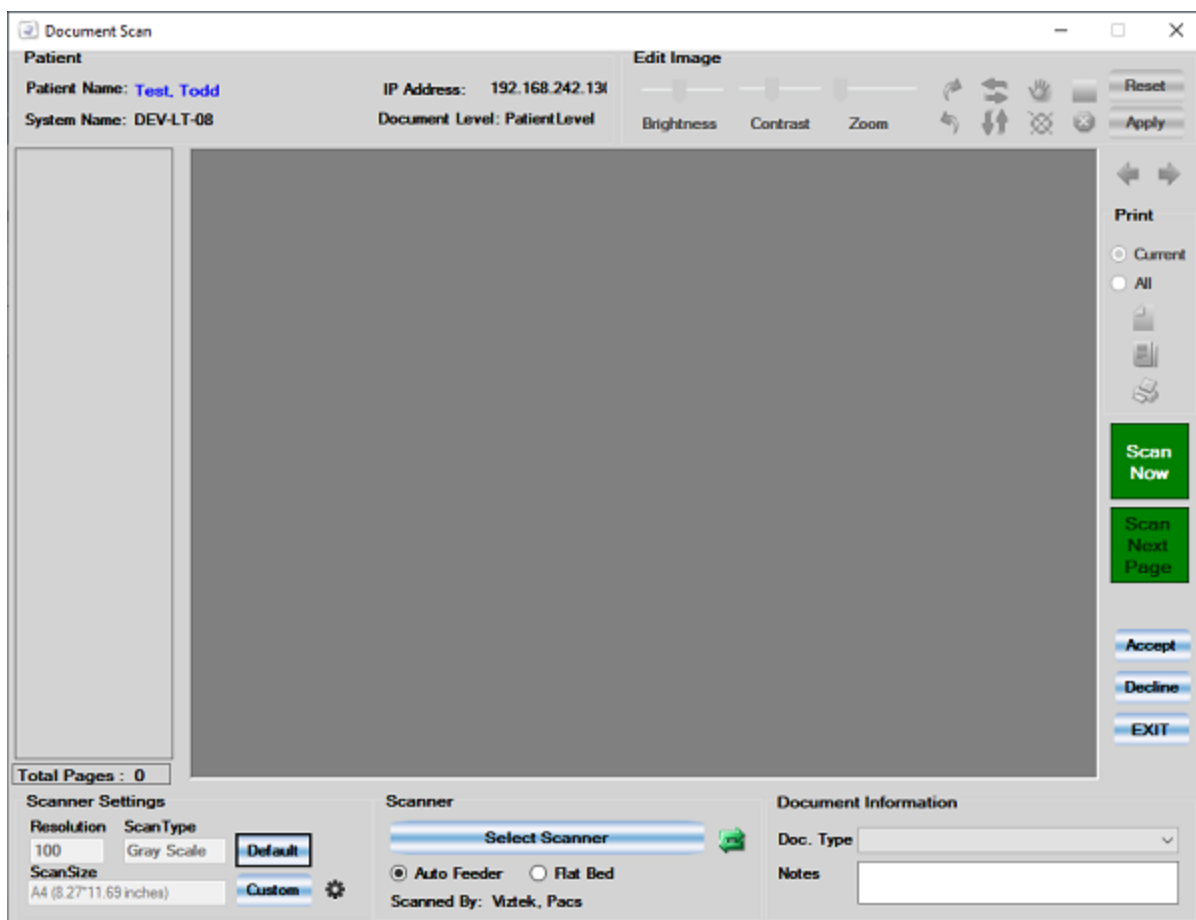
| Setting               | Process                          | Attach Document To |
|-----------------------|----------------------------------|--------------------|
| QUICK SCAN            | Scan document with basic options | Study              |
| QUICK SCAN TO PATIENT | Scan document with basic options | 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.

**Patient Documents**

Document Type \*

Created Date/Time \*

Requested By

Notes

Maximum file size: 20 MB

**SELECT FILES**

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 Symmetry PACS viewer.

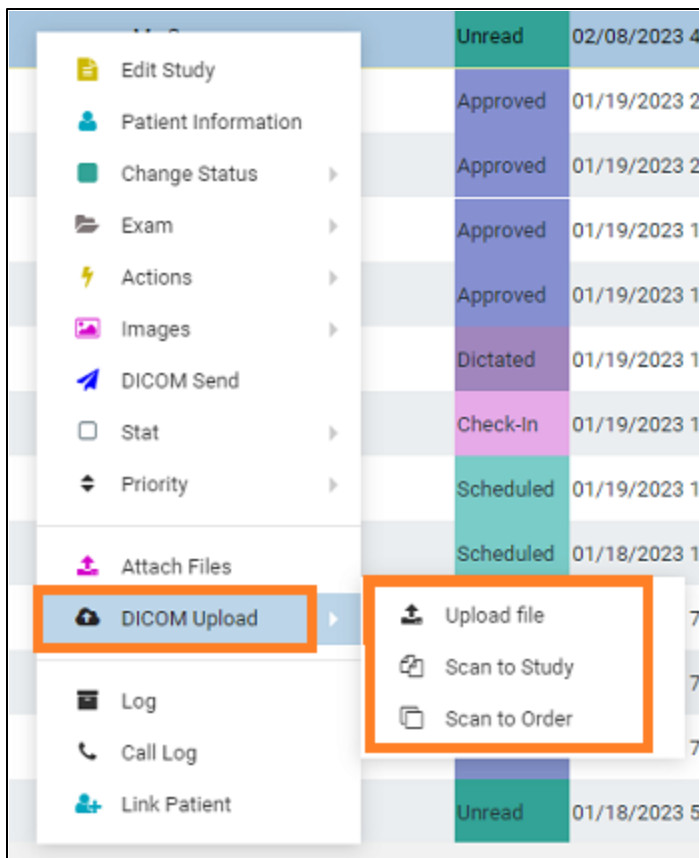


Prerequisite (scanning only): [Install Exa Scans](#)

### Procedure

1. Choose one of the following:

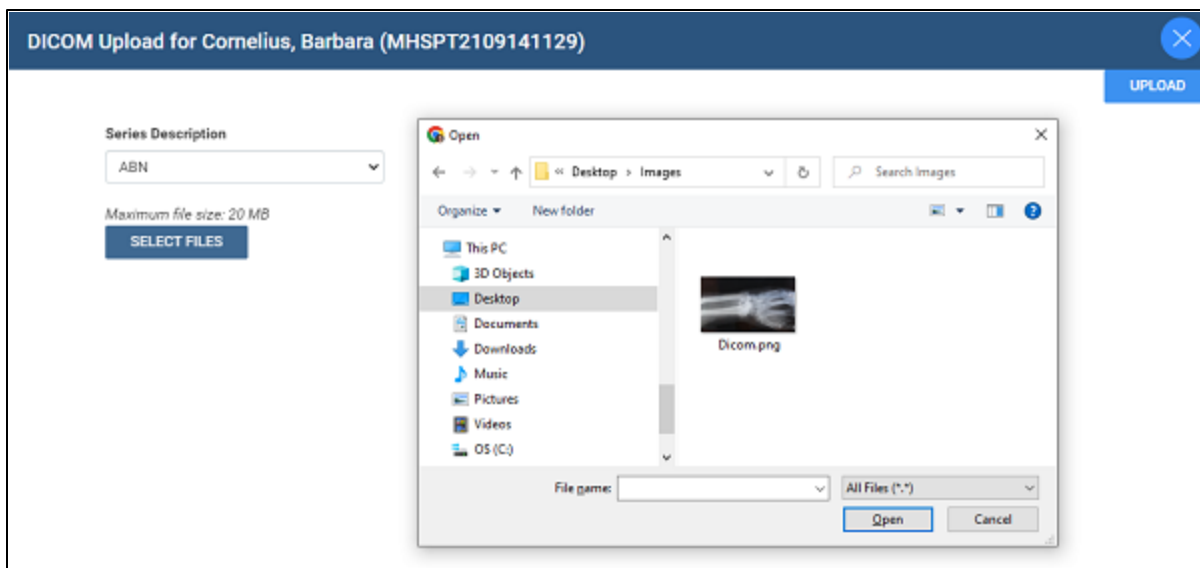
- [Worklist](#) > right-click a DICOM study > DICOM Upload > Upload File.
- [Worklist](#) > right-click a DICOM study > DICOM Upload > Scan to Study.
- [Worklist](#) > right-click a DICOM study > DICOM Upload > Scan to Order.



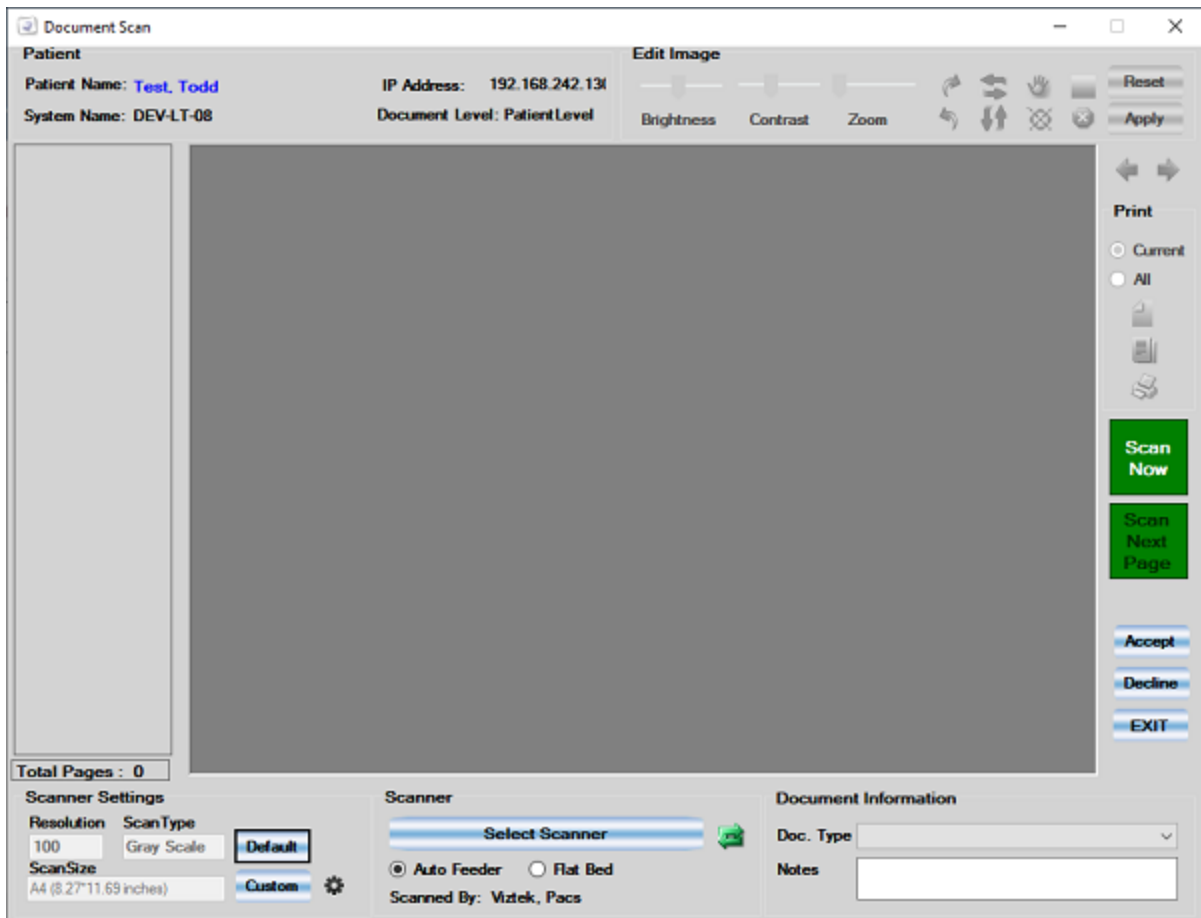
| Setting       | Process                                                                               | Attach Document To |
|---------------|---------------------------------------------------------------------------------------|--------------------|
| Upload file   | Upload document (PDF, image), convert to DICOM                                        | Patient            |
| Scan to Study | Select if the study already has images.<br>Scan document, convert to DICOM.           | Study              |
| Scan to Order | Select if the study does not already have images.<br>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, select your scanner, and then select Scan Now.



See also:

[Attach \(upload, scan\) non-DICOM documents](#)

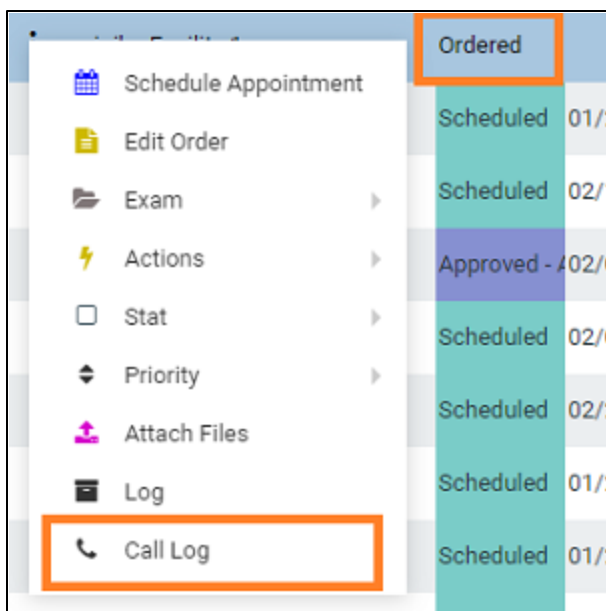
[Require document review](#)

## 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.

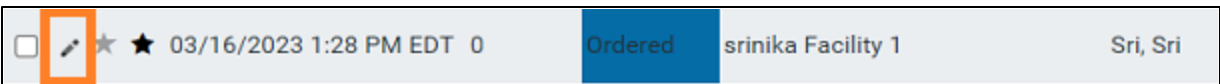
### Procedure

- 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.

**Patient, New (Acc#:PatN1120), 01/01/1977 , M, 46Y**

**EXAM INFORMATION**

**ORDER 773 774**

Order No. MC-10000503 Reason

Accession No. 774

Study UID 1.3.6.1.4.1.11157.3.50561 Study Notes Select Macro Note

Date 02/08/2023 5:45 PM EST

Study Status: Pre-Approved

Body Part Select

Orientation Select

Appointment Type 3D RNDR I&R CT MRI US/OTH REQ P...

Code 76377

G-Code

AUC Audit

Modality Reason

Diagnosis Codes Select Diagnostic Code

Referring Physician No Referring Physician

Ordering Physician No Ordering Physician

Reading Physician Select Read. Physician

Attorney Select Attorney

## 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](#)

[Add or edit a patient guarantor](#)

[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](#)

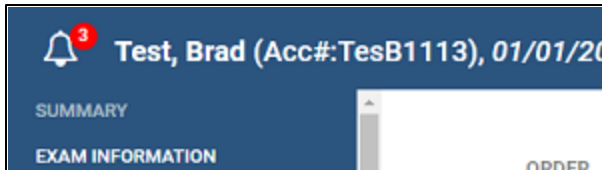
[View activity logs](#)

## 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.

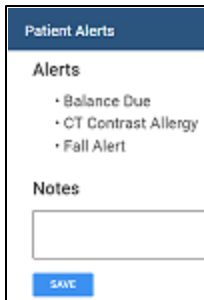
### Procedure

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.



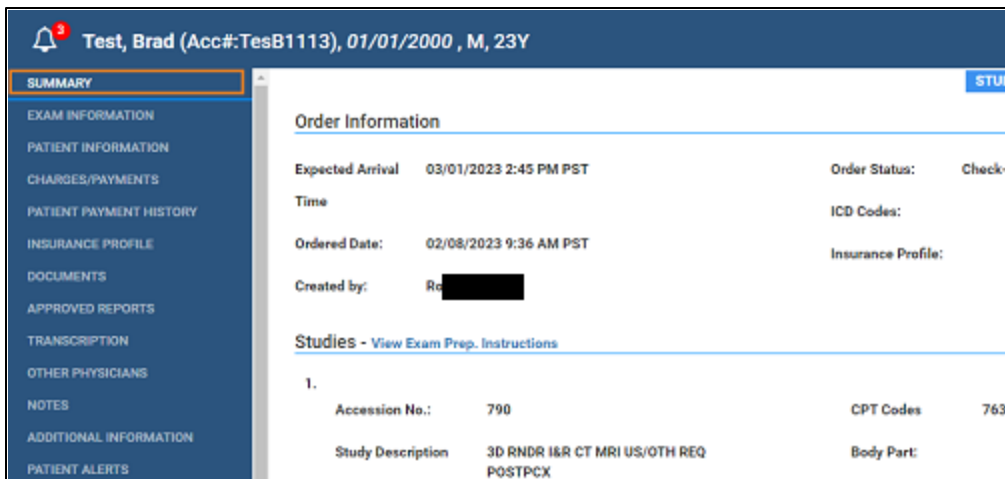
2. Optional: Enter notes and click SAVE.

## 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.                                                                                                                                    |
| 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).                                                                                                                     |

| Setting                            | Description                                                                                                                                                |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.                                                                                   |
| Discharge Instructions             | Type any discharge instructions.                                                                                                                           |
| Physician Order Status             | Status from Physician Portal.<br><br>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.

**Patient, New (Acc#:PatN1120), 01/01/1977 , M, 46Y**

**EXAM INFORMATION**

ORDER 773 **774**

Order No. MC-10000503 Reason

Accession No. 774

Study UID 1.3.6.1.4.1.11157.3.50561 Study Notes Select Macro Note

Date 02/08/2023 5:45 PM EST

Study Status: Pre-Approved

Body Part Select

Orientation Select

Appointment Type 3D RNDR I&R CT MRI US/OTH REQ P...

Code 76377

G-Code

AUC Audit

Modality Room

Diagnosis Codes Select Diagnostic Code

Referring Physician No Referring Physician

Ordering Physician No Ordering Physician

Reading Physician Select Read. Physician

Attorney Select Attorney

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.<br>If available, you can select the provider  button to view provider details.                                                              |
| Ordering Physician  | Select the physician who ordered the study.<br>If left blank, Symmetry PACS automatically enters the referring physician.<br>If available, you can select the provider  button to view provider details. |
| Reading Physician   | Select the radiologist or other physician who will read the study.                                                                                                                                                                                                                          |

| Setting                  | Description                                                                                                                                                                                                                                                                  |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                          | 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.<br><br>If available, you can select the provider  button to view provider details. |
| Technologist             | Select one primary technologist for the study.                                                                                                                                                                                                                               |
| Additional Technologists | Available when a primary technologist is selected.<br><br>Select up to 10 additional technologists who contribute to the study. Additional technologists are included in the Technologist Productivity operational report.                                                   |
| 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.                                                                                                                                                                                                     |

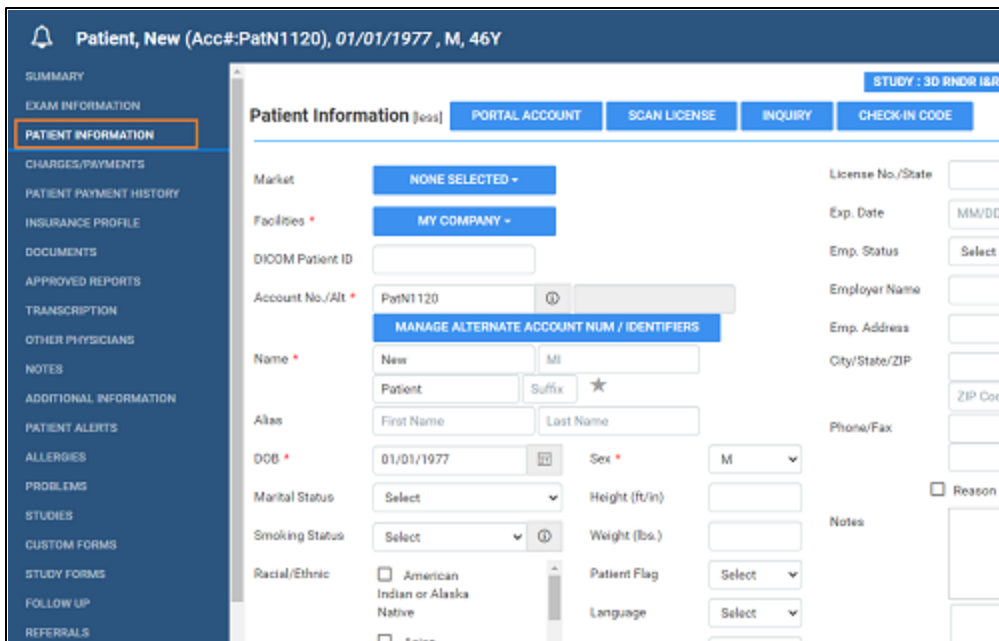
- If DICOM settings are not available to edit, at the bottom of the screen, select DICOM STUDY, and then make changes to DICOM settings as needed.
- To edit or add CPT codes, at the bottom of the screen, select the edit  or add  button, enter changes, and then select SAVE.
- Select SAVE.

## Edit basic patient demographics

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

### Procedure

- Go to [Worklist](#) > [Edit Study screen](#) > PATIENT INFORMATION.



**Patient, New (Acc#:PatN1120), 01/01/1977, M, 46Y**

**Patient Information** [less] PORTAL ACCOUNT SCAN LICENSE INQUIRY CHECK IN CODE

Market: NONE SELECTED

Facilities: MY COMPANY

DICOM Patient ID: [text box]

Account No./Alt: PatN1120

MANAGE ALTERNATE ACCOUNT NUM / IDENTIFIERS

Name: New MI Patient Suffix

DOB: 01/01/1977 Sex: M

Marital Status: Select Height (ft/in): [text box]

Smoking Status: Select Weight (lbs.): [text box]

Racial/Ethnic: American Indian or Alaska Native

License No./State: [text box]

Exp. Date: MM/DD/YY

Emp. Status: Select

Employer Name: [text box]

Emp. Address: [text box]

City/State/ZIP: [text box]

Phone/Fax: [text box]

Notes: [text box]

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.



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

### Procedure

1. Go to [Worklist](#) > [Edit Study screen](#) > [PATIENT INFORMATION](#) > PORTAL ACCOUNT.

Create Portal Account

Patient Account

Name

Test, Todd

Email

todd.test@konica.com

New Email

Confirm New Email

SAVE

RESET PASSWORD

Representative Account +

Scheebly, Kay

Email

todd@topk.com

Status

ACTIVE

First Name

Kay

Last Name

Scheebly

Relationship

Spouse

SAVE

New Email

Confirm New Email

SAVE

REMOVE ACCESS

RESET PASSWORD

### Create a patient account

1. In the Create Portal Account dialog, under Patient Account, type the patient's email address in the New Email and Confirm New Email boxes, and then select SAVE.

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

2. In the upper-right corner of the dialog, select SAVE.

500-001025A

232

## Create a representative account

You can create a representative account that allows another party to sign in to the patient's portal and kiosk accounts. For example, a parent can be a representative of their child.

1. Under Representative Account, type representative's first and last names.
2. Under Relationship, select the relationship of the representative to the patient.
3. Type the representative's email address in the New Email and Confirm New Email boxes, and then select SAVE.
4. In the dropdown list at the top of the dialog, select the name of the representative.

Result: The representative is assigned, and new fields appear for you to add additional representatives if needed.

5. An email is sent to the representative to verify and complete their account.

## Remove a representative's access to a patient account

1. Under Representative Account, in the dropdown list, select the representative whose access you want to remove.
2. At the bottom, select REMOVE ACCESS.

Result: The representative account still exists, but can no longer be used to access the current patient's accounts.

See also:

[Reset or enable a patient's portal account](#)

## Reset or enable a patient's portal account

You can reset a patient's password, and enable a disabled patient portal account.



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

### Procedure

1. Go to [Worklist](#) > [Edit Study screen](#) > [PATIENT INFORMATION](#) > PORTAL ACCOUNT.

### Create Portal Account

#### Patient Account

Name Test, Todd

Email todd.test@konica.com

---

New Email

Confirm New Email

**SAVE**

---

**RESET PASSWORD**

#### Representative Account +

Scheebly, Kay

Email todd@topk.com

Status ACTIVE

---

First Name Kay

Last Name Scheebly

Relationship Spouse

**SAVE**

---

New Email

Confirm New Email

**SAVE**

---

**REMOVE ACCESS** **RESET PASSWORD**

### Reset passwords

1. Under Patient Account or Representative Account, click RESET PASSWORD.

Result: An email is sent to the account holder, with a link to reset their password.

### Enable a disabled patient account

If a user's account is disabled, such as after multiple unsuccessful sign-in attempts, not only is the user prevented from signing in, but resetting the password becomes unavailable. To enable the account again, follow these steps.

1. Under Patient Account, select ENABLE ACCOUNT.

Create Portal Account

**Patient Account**

Name Testydemo, Testydemo

Email exa.testy.testers@demoA@gmail.com @

New Email

Confirm New Email

**Representative Account**

Select

First Name

Last Name

Relationship

New Email

Confirm

Account is disabled due to the number of failed login attempts. Click 'Enable Account' to reinstate the account. Once enabled, click 'Reset Password' to allow the patient to set a new password.

REMOVE ACCOUNT ENABLE ACCOUNT RESET PASSWORD

## Enable a disabled representative account

If a representative account is disabled, such as after multiple unsuccessful sign-in attempts, you can enable the account as follows.

1. Under Representative Account, select ENABLE ACCOUNT.

Account is disabled due to the number of failed login attempts. Click 'Enable Account' to reinstate the account. Once enabled, click 'Reset Password' to allow the Representative to set a new password.

REMOVE ACCOUNT ENABLE ACCOUNT RESET PASSWORD

See also:

[Add or edit a patient's portal account](#)

## Add or edit a patient guarantor

You can add a patient guarantor from the Edit Study screen. You can also do this from the patient chart (see [Assign a guarantor for a patient](#)).

1. Go to [Worklist](#) > [Edit Study screen](#) > PATIENT GUARANTOR.
2. Select ADD.

- Enter the following settings.

| Setting                | Description                                                                     |
|------------------------|---------------------------------------------------------------------------------|
| Inactive               | Select to inactivate the guarantor. Only one guarantor can be active at a time. |
| Name                   | Type the name of the guarantor.                                                 |
| DOB                    | Type or select the guarantor's date of birth.                                   |
| Address/City/State/ZIP | Type the address, city, state, and ZIP code of the guarantor.                   |
| Email ID               | Type the email address of the guarantor.                                        |
| Employer               | Type the employer of the guarantor.                                             |
| Sex                    | Select the sex of the guarantor.                                                |
| Relationship           | Select the relationship of the guarantor to the patient.                        |
| SSN                    | Type the social security number of the guarantor.                               |
| Mobile/Work/Home       | Type the phone numbers of the guarantor.                                        |

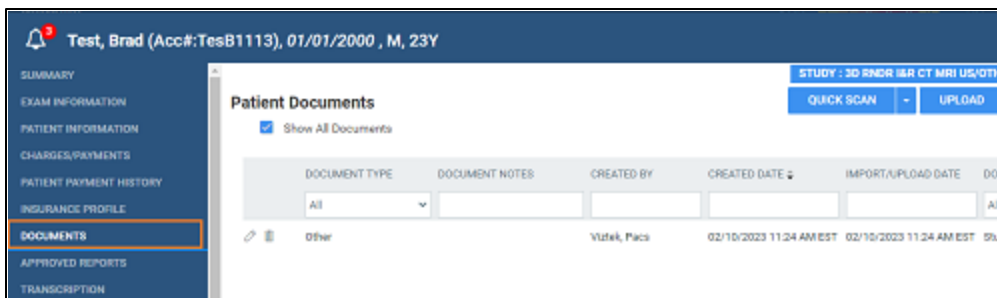
- Select SAVE.

## 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

- 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 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

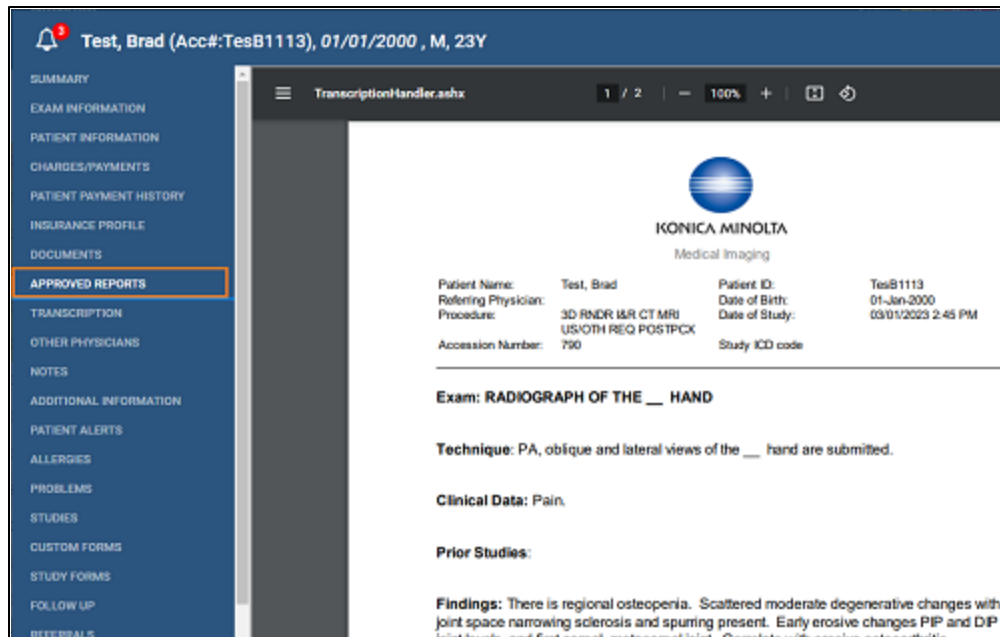
### Procedure

1. Go to [Worklist](#) > [Edit Study screen](#) > APPROVED REPORTS to open a window and display the report.



Note: You can also select the Approve Reports button on a worklist study row. See [Use the study toolbar buttons](#).

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

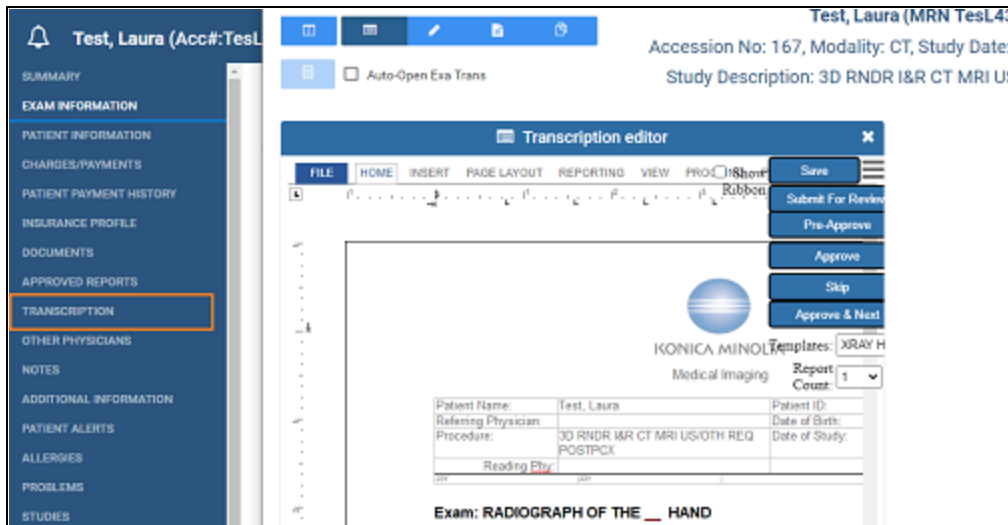


## Open the transcription screen

Often you open transcription from the worklist, but you can also open the transcription multi-panel 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 multi-panel.



See also:

[Dictation and transcription with WebTrans](#)

[Dictation and transcription with Exa Trans and Dragon](#)

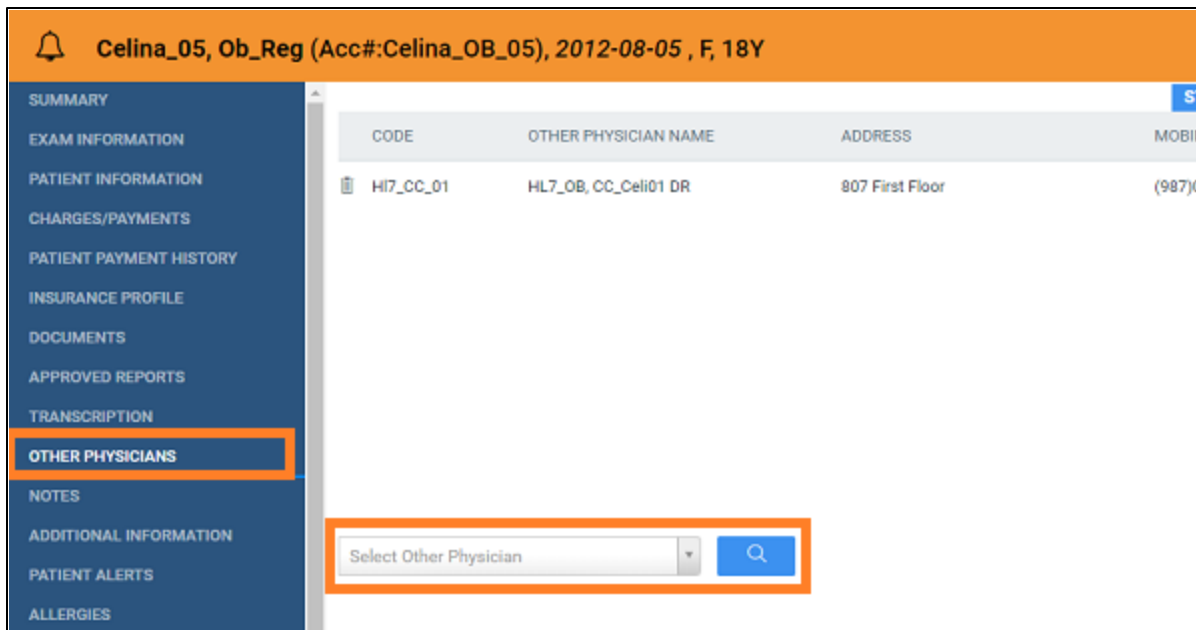
[Dictation and transcription with Exa Voice and Exa Trans](#)

## 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.

- 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

- Go to [Worklist](#) > [Edit Study screen](#) > NOTES.

- Select the PATIENT NOTES, STUDY NOTES, or SCHEDULE NOTES sub-tab.
- Select ADD, type notes, and then select SAVE.

- Select the REASON FOR STUDY tab.

| STUDY NOTES      | PATIENT NOTES | SCHEDULE NOTES                                      | REASON FOR STUDY | CALL LOG |
|------------------|---------------|-----------------------------------------------------|------------------|----------|
| Reason for Study |               | <div>Patient complained of chronic headaches.</div> |                  |          |

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.

Test, Laura (Acc#:TesL43), 01/01/2000, F, 22Y

STUDY : 3D RNDR I&R CT MRI US/OTH

| STUDY NOTES                                                                                                                                                                                                                              | PATIENT NOTES           | SCHEDULE NOTES                 | REASON FOR STUDY | CALL LOG |      |           |             |              |                         |                                |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|--------------------------------|------------------|----------|------|-----------|-------------|--------------|-------------------------|--------------------------------|
| <table border="1"> <thead> <tr> <th>USER</th> <th>DATE/TIME</th> <th>STUDY NOTES</th> </tr> </thead> <tbody> <tr> <td>Viztek, Pacs</td> <td>02/10/2023 11:55 AM EST</td> <td>A test note, manually entered.</td> </tr> </tbody> </table> |                         |                                |                  |          | USER | DATE/TIME | STUDY NOTES | Viztek, Pacs | 02/10/2023 11:55 AM EST | A test note, manually entered. |
| USER                                                                                                                                                                                                                                     | DATE/TIME               | STUDY NOTES                    |                  |          |      |           |             |              |                         |                                |
| Viztek, Pacs                                                                                                                                                                                                                             | 02/10/2023 11:55 AM EST | A test note, manually entered. |                  |          |      |           |             |              |                         |                                |

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

| STUDY NOTES     | PATIENT NOTES                            | SCHEDULE NOTES | REASON FOR STUDY | CALL LOG |
|-----------------|------------------------------------------|----------------|------------------|----------|
| User            | Viztek, Pacs                             |                |                  |          |
| Date/Time       | 03/15/2023 8:48 AM EDT                   |                |                  |          |
| Call Category * | Schedule ▼                               |                |                  |          |
| Call note *     | <div>Don't schedule on Wednesdays.</div> |                |                  |          |

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

- Go to [Worklist](#) > [Edit Study screen](#) > ADDITIONAL INFORMATION.

**Test, Laura (Acc#:TesL43), 01/01/2000, F, 22Y**

**ADDITIONAL INFORMATION**

**Patient's Condition Is Related to:**

☐ Employment ☐ Auto Accident ☐ Other Accident

**Accident State:** Select ▼

**Date of Illness Onset, Injury/Accident, or Pregnancy (LMP):**

**Date:** MM/DD/YY

**Other Date:** MM/DD/YY

**Dates Patient Unable to Work at Current Occupation:**

**From/To:** MM/DD/YY  MM/DD/YY

**Dates Patient Hospitalized Related to Current Services:**

**From/To:** MM/DD/YY  MM/DD/YY

**Schedule Notes:**

☐ Outside Lab

**Original Ref.:** Original Ref.

**Claim Authorization:**

- 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.

Test, Laura (Acc#:TesL43), 01/01/2000 , F, 22Y

STUDY : 3D BMDR MR CT MRI US/OTM REQ POSTPCK - STUDIES : SELEC

From: 02/08/2023 12:00:02 AM ES To: 02/10/2023 11:59:59 PM ES

User Provider HLT CF

EXPORT TO EXCEL RELO

| LOGGED DATE             | SCREEN              | USER       | LOG DESCRIPTION                                    |
|-------------------------|---------------------|------------|----------------------------------------------------|
| 02/10/2023 12:06 PM EST | Order Forms         | ViztekPacs | Add New Order form (Test) created                  |
| 02/10/2023 12:00 PM EST | Patient Alerts      | ViztekPacs | Inserted patient alert.                            |
| 02/10/2023 12:00 PM EST | Patient Alerts      | ViztekPacs | Inserted patient alert.                            |
| 02/10/2023 11:55 AM EST | Study Notes         | ViztekPacs | Created study note.                                |
| 02/10/2023 11:53 AM EST | Referring Providers | ViztekPacs | Add New Referring Provider (Test, Referring) added |

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 logs, 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 known 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

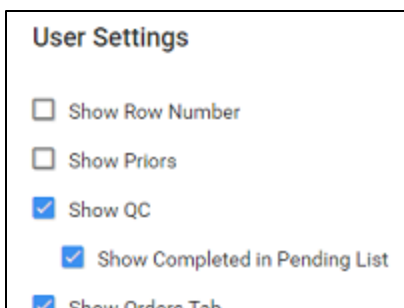
When received studies fail to match receiver rules or studies in the database, they appear on the QC tab of the worklist. To find conflicts needing reconciliation more easily, you can sort studies in the QC tab of the worklist by their QC status.



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.

Worklist

PRE ORDERS

QC

ALL STUDIES

<

RULE

STATUS

STUDY DATE

IMGS.

PATIENT

MODALITY

STUDY DESCRIPTION

All

+

MY NOVA

Completed

2022-06-17 9:36 AM EDT

2

Rand, Todd

DX

Shoulder RT

+

DEFAULT RULE

Completed

2022-06-09 9:29 PM EDT

446

Masquef, Carlos Ariel

MR

COLANGIORESC

+

MY NOVA

Conflicts

2022-06-09 9:29 PM EDT

2

EXA\*IMP1

MR

COLANGIORESC

+

MY NOVA

Completed

2022-06-09 9:43 PM EDT

1

Exa-Conflicted2

MR

COLANGIORESC

- On the search bar, click inside the STATUS box.
- 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

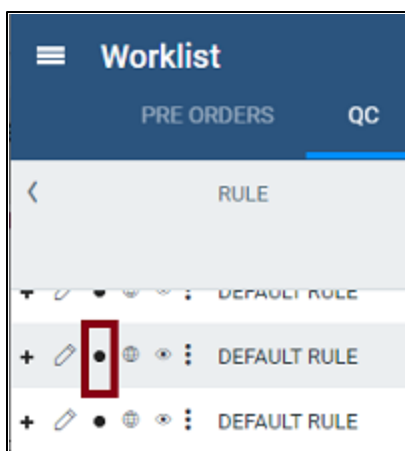
When received studies fail to match receiver rules or studies in the database, they appear on the QC tab of the worklist. To reconcile conflicts, start by trying to match the conflicting study to a RIS order.



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

### Procedure

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



- 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.

**Reconciliation (Study)**

SUMMARY  
EXAM INFORMATION  
PATIENT INFORMATION  
CHARGES/PAYMENTS  
PATIENT PAYMENT HISTORY  
INSURANCE PROFILE  
DOCUMENTS  
APPROVED REPORTS  
TRANSCRIPTION  
OTHER PHYSICIANS  
NOTES  
ADDITIONAL INFORMATION  
PATIENT ALERTS  
PROBLEMS  
STUDIES

**conflictReason : No patients matched, Move to Live option(STUDY) disabled**

**Current Study**

|                     |                                             |                      |            |
|---------------------|---------------------------------------------|----------------------|------------|
| Patient Name:       | EXA*IMP1 (EXAIMP)                           | DOB :                | 1984-01-01 |
| Service Description | [Acc#: 804400057240 ], COLANGIORESONANCIA-* | Body Part:           | ABDOMEN    |
| Study Date:         | 2022-06-09 9:29 PM EDT                      | Referring Physician: |            |

**Suggestions** RELOAD

| STUDY DATE       | PATIENT NAME | DOB | STUDY DESCR | ACCESSION N | ACCOUNT NO. | ORDER DA | REFERRING PHYSI |
|------------------|--------------|-----|-------------|-------------|-------------|----------|-----------------|
| No records found |              |     |             |             |             |          |                 |

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

**RIS Orders** RELOAD

|     | STUDY DATE     | PATIENT NAME       | DOB        | STUDY DESCR | ACCESSION N  | ACCOUNT NO. | ORDER DA   | REFERRING PHYSI   |
|-----|----------------|--------------------|------------|-------------|--------------|-------------|------------|-------------------|
| SEL | 2022-08-01 8:3 | One*Two2           | 1990-10-10 | BONE LENGTH | HTT568959940 | 5625142     | 2022-08-01 |                   |
| SEL | 2022-08-01 8:3 | Celina_01, Reg S P | 2000-05-04 | BONE LENGTH | CelinaS1_01  | Cell01      | 2022-08-01 | Celina, Referring |

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

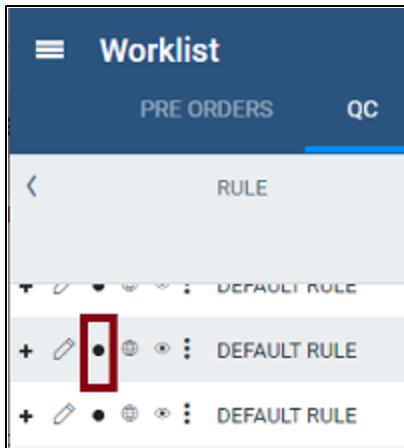
When received studies fail to match receiver rules or studies in the database, they appear on the QC tab of the worklist. If the conflict reason on screen is Multiple matches/Account# conflicts for patients, you can edit the demographics of the conflicting study to match a patient in the Symmetry PACS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



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

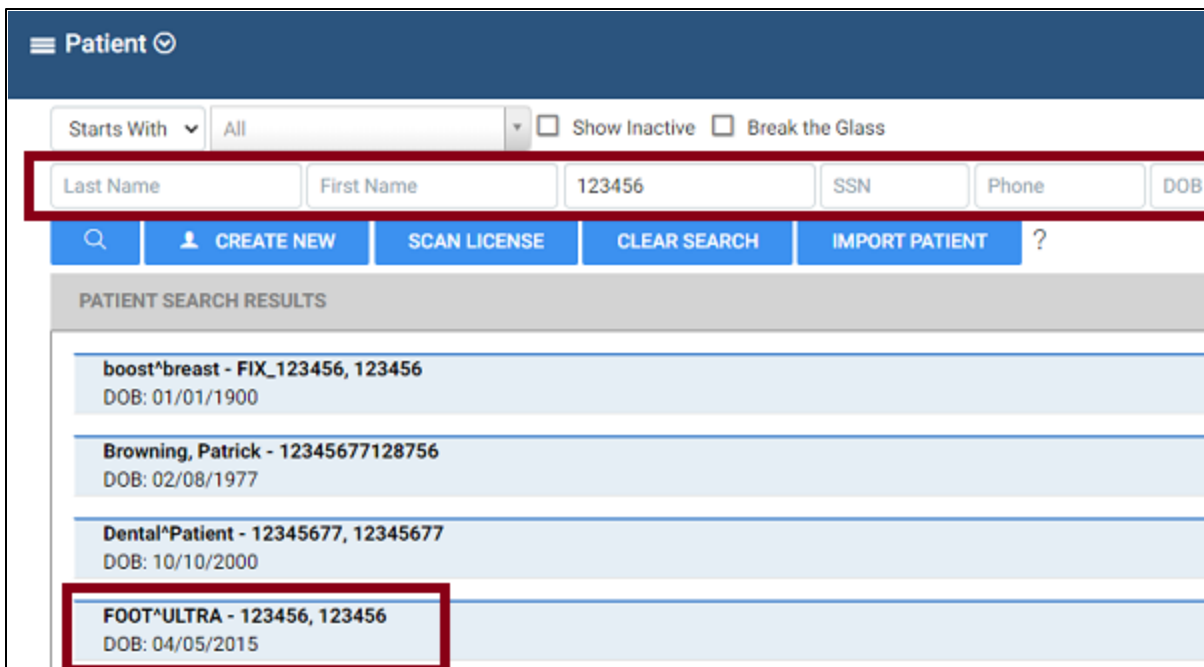
#### Procedure

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 Symmetry PACS, 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.



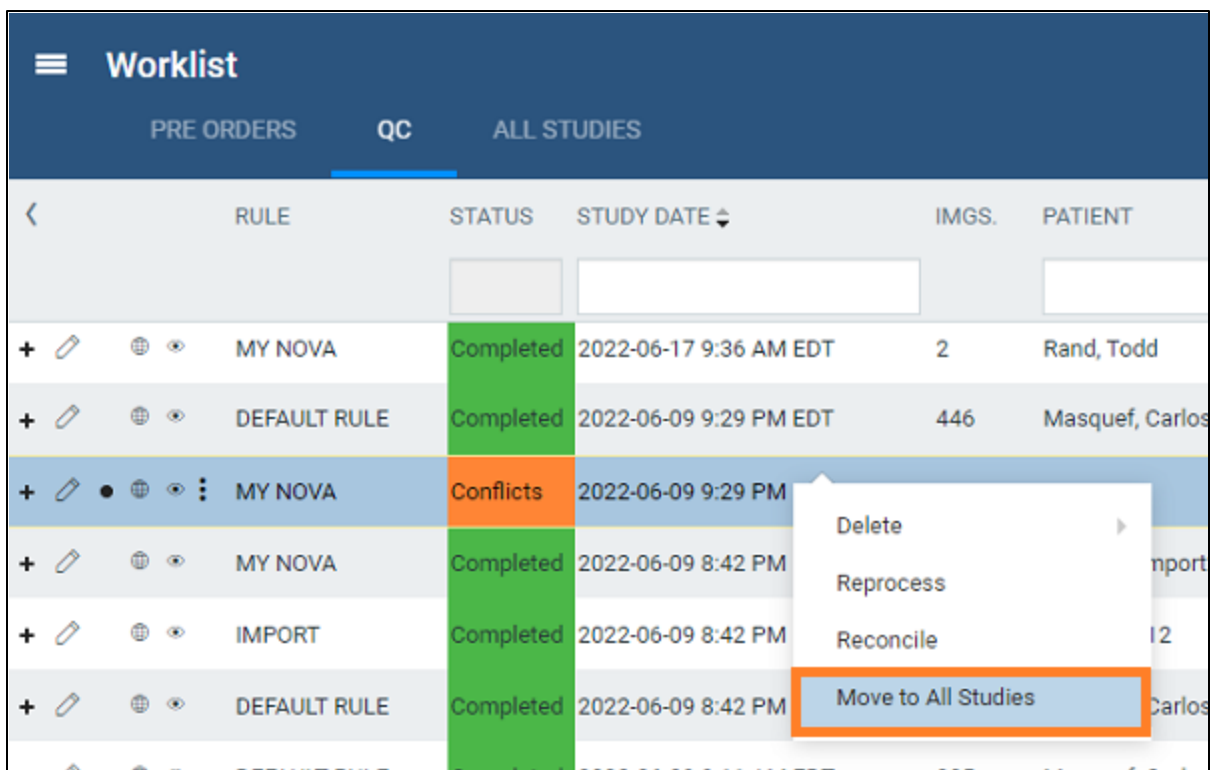
Prerequisite: [Prepare the QC tab](#).

### 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.



The screenshot shows the 'Worklist' interface with tabs for 'PRE ORDERS', 'QC', and 'ALL STUDIES'. The 'QC' tab is active. Below the tabs is a table with columns: RULE, STATUS, STUDY DATE, IMGS., and PATIENT. A context menu is open over the 'Conflicts' status study, showing options: Delete, Reprocess, Reconcile, and Move to All Studies (highlighted with an orange border).

|                               | RULE         | STATUS    | STUDY DATE             | IMGS. | PATIENT         |
|-------------------------------|--------------|-----------|------------------------|-------|-----------------|
| + [edit] [share] [eye]        | MY NOVA      | Completed | 2022-06-17 9:36 AM EDT | 2     | Rand, Todd      |
| + [edit] [share] [eye]        | DEFAULT RULE | Completed | 2022-06-09 9:29 PM EDT | 446   | Masquef, Carlos |
| + [edit] [share] [eye] [menu] | MY NOVA      | Conflicts | 2022-06-09 9:29 PM     |       |                 |
| + [edit] [share] [eye]        | MY NOVA      | Completed | 2022-06-09 8:42 PM     |       | Import          |
| + [edit] [share] [eye]        | IMPORT       | Completed | 2022-06-09 8:42 PM     |       | 12              |
| + [edit] [share] [eye]        | DEFAULT RULE | Completed | 2022-06-09 8:42 PM     |       | Carlos          |

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

Symmetry PACS offers one or more of these 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 multi-panel 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.

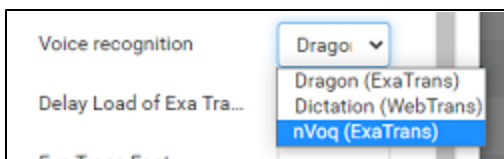


### Prerequisites:

- 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

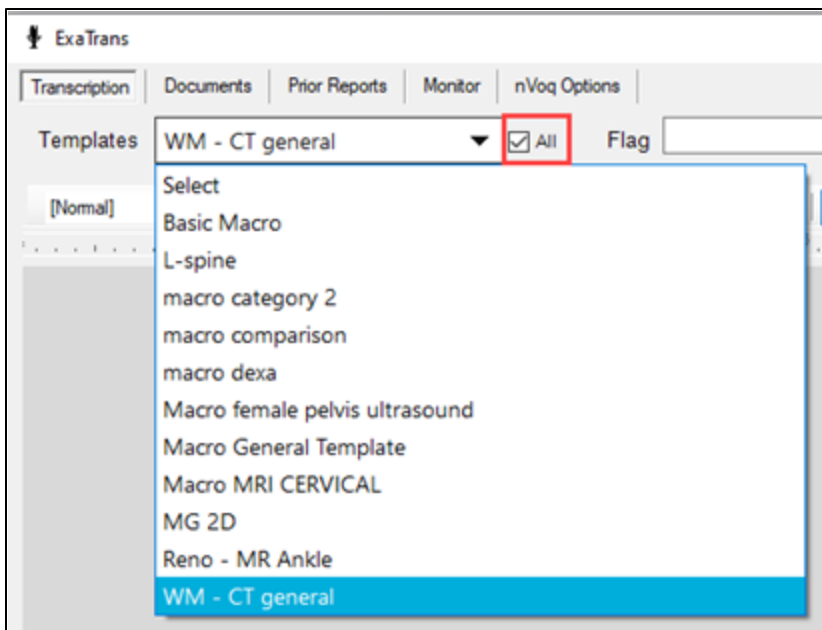
With Exa Voice and Exa Trans you can dictate and transcribe findings simultaneously. If you pause dictation, during the next 30 seconds you can use voice commands or resume dictation without losing the connection to Exa Voice. After the 30 seconds, dictation "stops," and the connection closes. To dictate 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 one of the following options:
  - e-Sign & Approve: Signs and approves the transcription, and then returns to the worklist.
  - Approve and Next: Signs and approves the transcription, and then opens the next unread study.
  - Not Approve: Saves the dictation and leaves the study in Unread status.
  - Save: Saves the dictation and changes the status to Draft.
  - Skip: Skips to the next available study without saving.
  - Pre-Approve: Saves the dictation and changes the status to Pre-Approved.

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 addenda 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 one of the following:
  - Addendum Approve: Saves the addendum and changes the study status to Approved.
  - Addendum Save: Saves the addendum and changes the study status to Draft - Addendum.
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 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:

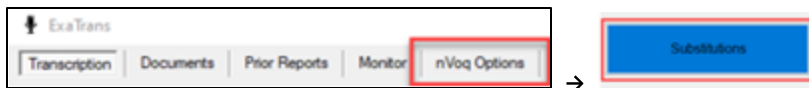
[Dictation and transcription with Exa Voice and Exa Trans](#)

## Configure substitutions

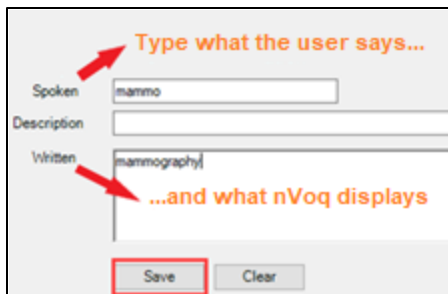
You can add substitutions (voice macros) to Exa Voice so that you can speak something short to type something long. With the example substitution below, when you say "mammo" Exa Voice types "mammography."

### 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.

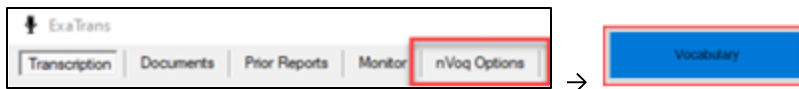


Prerequisite: [Turn on Exa Trans and nVoq](#).

### 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.

A screenshot of the 'Vocabulary' screen. It features two text input fields. The first field is labeled 'Written' and has an orange arrow pointing to it with the text 'Type the word or phrase you want Voq to display'. The second field is labeled 'Sounds Like' and has an orange arrow pointing to it with the text 'Pronunciation'. Below these fields are two buttons: 'Save' and 'Clear'.

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.

**Application**

Theme: Light

☒ Show Hypothesis

☒ Pin Hypothesis

☐ Show "Enable Approvals" Checkbox

**Editor**

☐ Keep Delimiters

☐ Replace Entire Word

**Microphone**

☐ Hold Button To Record

**Button Mappings**

| Button      | Action         | Parameter |
|-------------|----------------|-----------|
| FastForward | Next Field     |           |
| Rewind      | Previous Field |           |
| SeekStart   | None           |           |
| SeekEnd     | None           |           |

**nVoq**

Substitutions

Vocabulary

| 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.<br>Clear: Press the button once to record, again to stop.        |
| Button Mappings                  | Configure buttons for SpeechMikes and PowerMics.                                                                |
| nVoq                             | Available if using nVoq. See <a href="#">Configure substitutions</a> and <a href="#">Configure vocabulary</a> . |

## 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<br>1 = Show |

| Setting                     | Line                                           | Value                                                                                                                                                   |
|-----------------------------|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pin hypothesis text         | <add key="PinHypothesisText" value="1" />      | 0 = Unpin (text moves with the cursor)<br>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<br>On = Mic buttons trigger Approve and Approve & Next                                      |
| Light or dark theme         | <add key="Theme" value="Dark" />               | Dark = Darker user interface<br>Light = Lighter user interface                                                                                          |
| Recording timeout           | <add key="PauseRecordingTimeout" value="30" /> | Setting range: 0-30<br>0 = Recording stops immediately without entering Paused state<br>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.<br>Example: Say, "Select cardiac arrest" to select the word "cardiac" followed by the word "arrest." |
| Select [word] through [word]        | Selects a range of words<br>Example: Say, "Select food through department" to select the phrase "food and beverage department." |
| Next variable<br>Next field         | Selects the next set of brackets within the report and their contents.                                                          |
| Previous variable<br>Previous field | Selects the previous set of brackets within the report and their contents.                                                      |
| Next line<br>New line               | Adds a line after the current line                                                                                              |
| Letter<br>Capital                   | Capitalizes the current letter                                                                                                  |
| Caps                                | Capitalizes the first letter of the current word                                                                                |
| Caps on<br>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<br>All caps off         | Turns capitalization of all letters of all words ON and OFF                                                                     |
| Lowercase<br>Overwrite              | Sets the first dictated word in lowercase                                                                                       |

| Command                                  | Description                                                                                                                                                                                                             |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Numeral one period<br>One period         | Creates a numbered list and capitalizes the first letter of each list item                                                                                                                                              |
| Number next<br>Next number               | Creates a numbered list, capitalizes the first letter of each list item, and adds a new line before each item                                                                                                           |
| Letter next<br>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<br>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<br>Dash<br>Minus sign             | -                                                                                                                                                                                                                       |
| Question mark                            | ?                                                                                                                                                                                                                       |
| Exclamation mark<br>Exclamation point    | !                                                                                                                                                                                                                       |
| Open paren<br>Open parenthesis           | (                                                                                                                                                                                                                       |
| Close paren<br>Close parenthesis         | )                                                                                                                                                                                                                       |
| Open brace<br>Open curly brace           | {                                                                                                                                                                                                                       |
| Close brace<br>Close curly brace         | }                                                                                                                                                                                                                       |
| Open bracket<br>Open square bracket      | [                                                                                                                                                                                                                       |
| Close bracket<br>Close square bracket    | ]                                                                                                                                                                                                                       |
| Less than sign<br>Open angle bracket     | <                                                                                                                                                                                                                       |
| Greater than sign<br>Close angle bracket | >                                                                                                                                                                                                                       |
| Hash sign                                | #                                                                                                                                                                                                                       |

| Command                                                   | Description |
|-----------------------------------------------------------|-------------|
| Number sign<br>Pound sign                                 |             |
| At sign                                                   | @           |
| Asterisk<br>Asterisk sign                                 | *           |
| Ampersand<br>And sign                                     | &           |
| Tilde sign                                                | ~           |
| Forward slash<br>Slash                                    | /           |
| Back slash                                                | \           |
| Double slash                                              | //          |
| Quote<br>Open quote<br>Open double quote<br>Start quote   | “           |
| Unquote<br>Close quote<br>Close double quote<br>End quote | ”           |
| Open single quote                                         | ‘           |
| Close single quote                                        | ’           |
| Apostrophe                                                | '           |
| Apostrophe S                                              | 's          |
| Percent sign                                              | %           |
| Ellipsis                                                  | ...         |
| Dollar sign                                               | \$          |
| Equal sign                                                | =           |
| Plus sign                                                 | +           |
| Multiplication sign                                       | *           |
| Division sign                                             | ÷           |
| Plus or minus sign                                        | ±           |
| Underscore sign                                           | —           |
| Vertical bar                                              |             |
| One quarter sign                                          | ¼           |

| Command                                                                                | Description               |
|----------------------------------------------------------------------------------------|---------------------------|
| One half sign                                                                          | $\frac{1}{2}$             |
| Three quarters sign                                                                    | $\frac{3}{4}$             |
| <b>Dates and Times</b>                                                                 |                           |
| March seventeen two thousand twenty-three<br>March seventeen twenty twenty-three       | March 17, 2023            |
| Three seventeen twenty twenty-three<br>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<br>Oh eight hundred hours                                     | 0800 hours                |
| Zero zero twenty two hours<br>Zero zero two two hours                                  | 0022 hours                |
| <b>Numbers, dollars, and cents</b>                                                     |                           |
| One hundred                                                                            | 100                       |
| one hundred twenty                                                                     | 120                       |
| Three hundred fifty two                                                                | 352                       |
| Point five<br>Zero point five                                                          | 0.5                       |
| Seventy five dollars and fifty cents                                                   | \$75.50                   |
| Roman fifteen<br>(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  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](#)

[Dictate and transcribe a study](#)

[Edit and approve transcriptions](#)

[Add a dictation or transcription addendum](#)

[About using Exa Trans and Web Trans](#)

## Turn on Exa Trans and Dragon

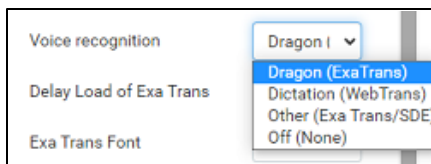
You must turn on Exa Trans before using it by turning on the Dragon speech-to-text option in the user settings.



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 one of the following options:
  - e-Sign & Approve: Signs and approves the transcription, and then returns to the worklist.
  - Approve and Next: Signs and approves the transcription, and then opens the next unread study.
  - Not Approve: Saves the dictation and leaves the study in Unread status.
  - Save: Saves the dictation and changes the status to Draft.
  - Skip: Skips to the next available study without saving.
  - Pre-Approve: Saves the dictation and changes the status to Pre-Approved.

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 one of the following:

Addendum Approve: Saves the addendum and changes the study status to Approved.

Addendum Save: Saves the addendum and changes the study status to Draft - Addendum.

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 multi-panel) 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 multi-panel 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 multi-panel 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.<br>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<br>Esign & Approve                                                                       | Study is approved, viewer closes, Exa Trans minimized.                                                                                                                           |
| Exa Trans<br>Approve & Next                                                                        | Study is approved, viewer and Exa Trans open with next available study.                                                                                                          |
| Exa Trans<br>Not Approve                                                                           | Study status changes to Not Approved, viewer closes, and Exa Trans minimizes.                                                                                                    |

| Action/Condition                           | Effect                                                                                                           |
|--------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| Exa Trans<br>Skip                          | Study stays in Unread status, viewer and Exa Trans open with the next available study                            |
| Exa Trans<br>Save                          | Study status changes to Draft, viewer and Exa Trans remain open with current study                               |
| Exa Trans<br>Pre Approve                   | Study status changes to Pre-Approved, viewer closes, and Exa Trans minimizes                                     |
| Exa Trans and Web Trans<br>Esign & Approve | Exa Trans closes, Web Trans minimizes or closes                                                                  |
| Exa Trans and Web Trans<br>Approve & Next  | Study status changes to Approve, viewer, Exa Trans, and Web Trans open with the next available study             |
| Exa Trans and Web Trans<br>Not Approve     | Study status changes to Not Approved, viewer, Exa Trans, and Web Trans minimize or close.                        |
| Exa Trans and Web Trans<br>Skip            | Study status remains Unread, the viewer, Exa Trans, and Web Trans open the next available patient or study.      |
| Exa Trans and Web Trans<br>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<br>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 Symmetry PACS, radiologists can dictate findings in Exa Dictation, and the transcriptionist can transcribe them in Web Trans. Web Trans features "the multi-panel," 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](#)

[Dictate a study](#)

[Edit and approve transcriptions in Web Trans](#)

[Enter notes in Web Trans](#)

[Manage documents in Web Trans](#)

[Manage prior reports in Web Trans](#)

## Turn on Exa Dictation and Web Trans

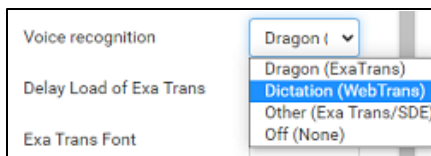
To get started, configure Voice Recognition as follows.



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 multi-panel  button.
2. In the Web Trans multi-panel, on the toolbar, select one or more of the following buttons:



1                      2                      3                      4                      5

- 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 multi-panel, 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](#)

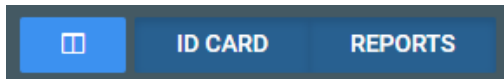
Parent: [Exa Dictation and transcription with Web Trans](#)

## 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 multi-panel  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.







**Niewind, Danielle** **M**  
**03/04/1992, F** **S**  
**GN021000** **A**

**STUDY DESCRIPTION: CT Abdomen and Pelvis with C...**

**REFERRING PHYSICIAN: Hearn, Evette ARNP**

**Documents**

☒ Show All Documents **SET AS DEFAULT**

|                                     |                                     |                                     |                                     |
|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Insurance Card<br>01/21/2021        | Order/Prescription<br>11/01/2021    | Order/Prescription<br>11/01/2021    | Order/Prescription<br>11/01/2021    |
| Order/Prescription<br>11/01/2021    | Order/Prescription<br>11/01/2021    | Order/Prescription<br>11/01/2021    | Order/Prescription<br>11/03/2021    |
| Other<br>01/21/2021                 |                                     |                                     | Patient Forms<br>12/28/2021         |
| Patient Forms<br>03/08/2021         | Patient Forms<br>03/31/2021         | Patient Forms<br>03/31/2021         | Patient Forms<br>07/20/2021         |
| Patient Portal Upload<br>08/18/2021 | Patient Portal Upload<br>08/18/2021 | Patient Portal Upload<br>08/18/2021 | Patient Portal Upload<br>01/21/2021 |
| Prior Report<br>07/23/2021          | Tech Worksheet<br>07/23/2021        | Unknown<br>10/11/2021               |                                     |


**DROP DOCUMENT TO PREVIEW**
**DROP DOCUMENT TO PREVIEW**

**Drop Document to Preview** 

Next: [Manage prior reports in Web Trans](#)

Previous: [Enter notes in Web Trans](#)

Parent: [Exa Dictation and transcription with Web Trans](#)

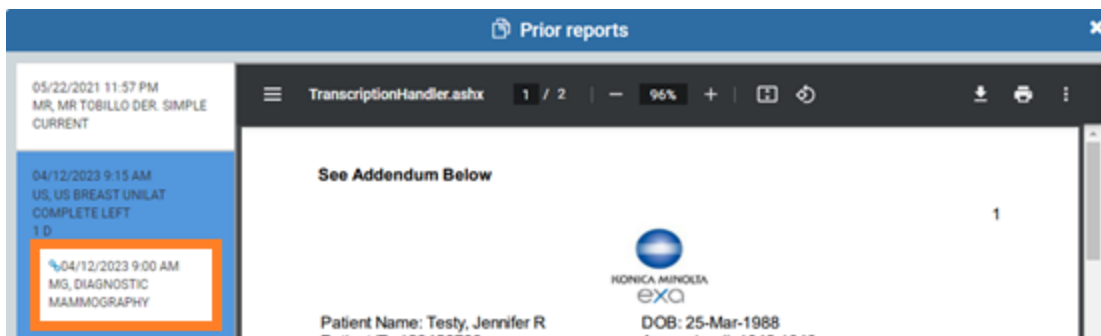
## Manage prior reports in Web Trans

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 multi-panel  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 going 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.

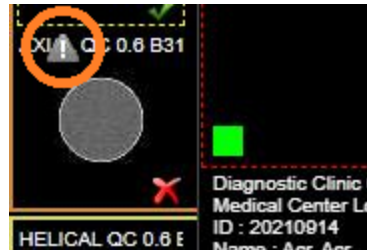


Caution:

- Check for the 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.
- Note any series caution symbols on the thumbnail bar, indicating that the series is in storage but was not yet downloaded or opened in the viewer.



The red lossless indicator (red square) means the image has not yet fully loaded.



The series caution symbol: series not yet downloaded or opened

## 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

- 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 |

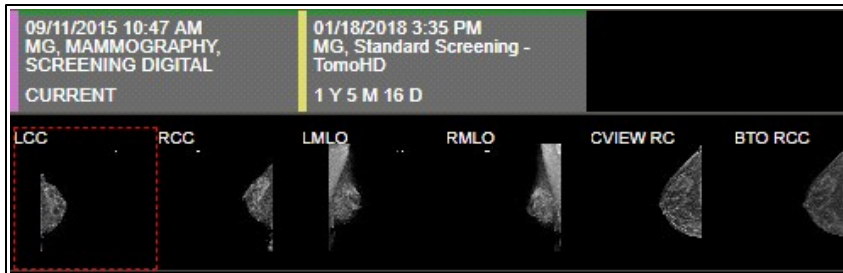
If an R appears in the R column, the prior includes a report. If the priors are linked:

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

- 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.

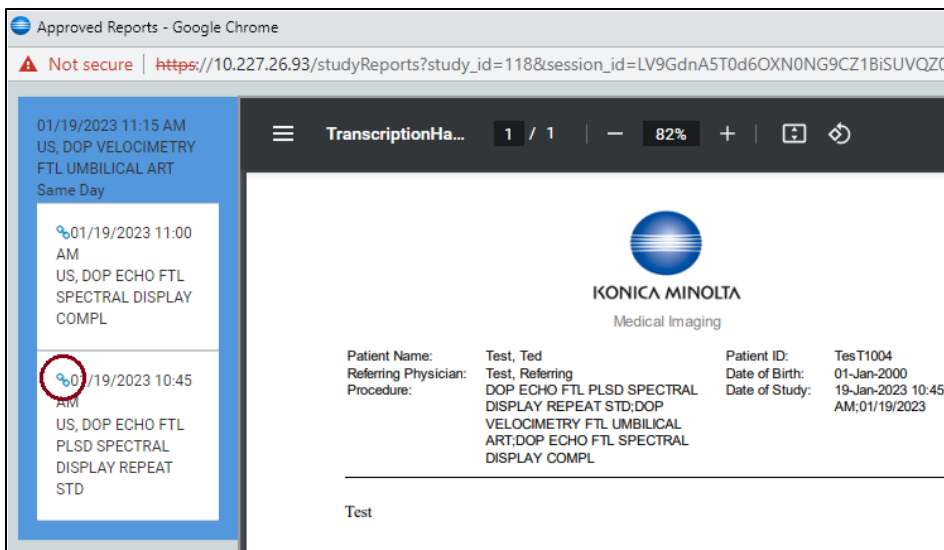
### Open a prior report

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).



### Caution:

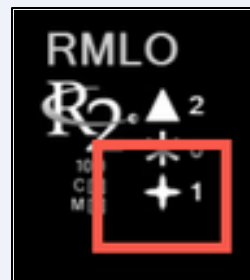
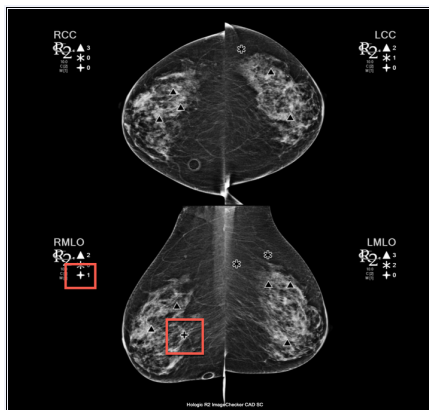
- Mammography diagnostic reading must be performed on approved, calibrated monitors.
- Your browser's zoom factor must be set to 100%. Zoom factors other than 100% can compromise image appearance, diagnostic accuracy, and accuracy of calibration tools.

Symmetry PACS uses tracking IDs in the SR data to ensure that when you click a 2D/synthesized image annotation it correctly opens 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 Malc “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 go to the next finding in a BTO study, or turn Maltc 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](#)).

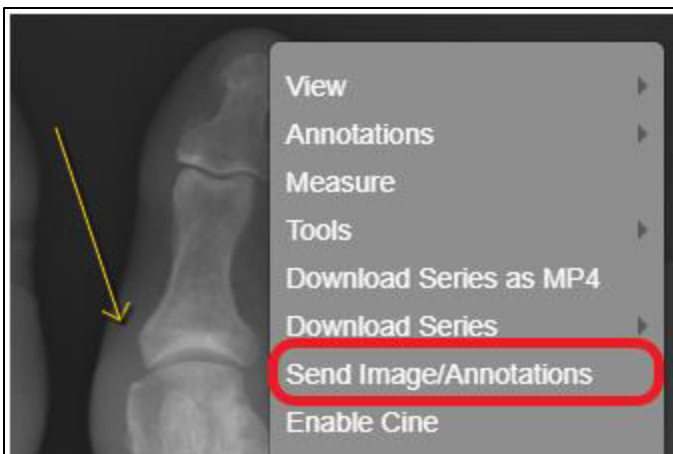
### Procedure

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.

Send Study

| ACCESSION NO. | STUDY DATE           | MODALITY | STUDY DESCRIPTION   | ACCOUNT NO. | PATIENT     | DOB        | REFERRING PHYSICIAN       |
|---------------|----------------------|----------|---------------------|-------------|-------------|------------|---------------------------|
| 023H16926805  | 02/08/2023 7:00 A CT | PI       | SKULL TO THIGH W/CT | 62589       | Bill, Suv J | 03/03/1938 | Bassetti, Dennis Randolph |

Priority
☐ Include Approved Report

|   |                             |
|---|-----------------------------|
| ✓ | EXA-V32-V32 (EXA-V32-V32)   |
|   | OPAL_32_33 (OPAL_32_33)     |
|   | opal_v32_v33 (opal_v32_v32) |

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).



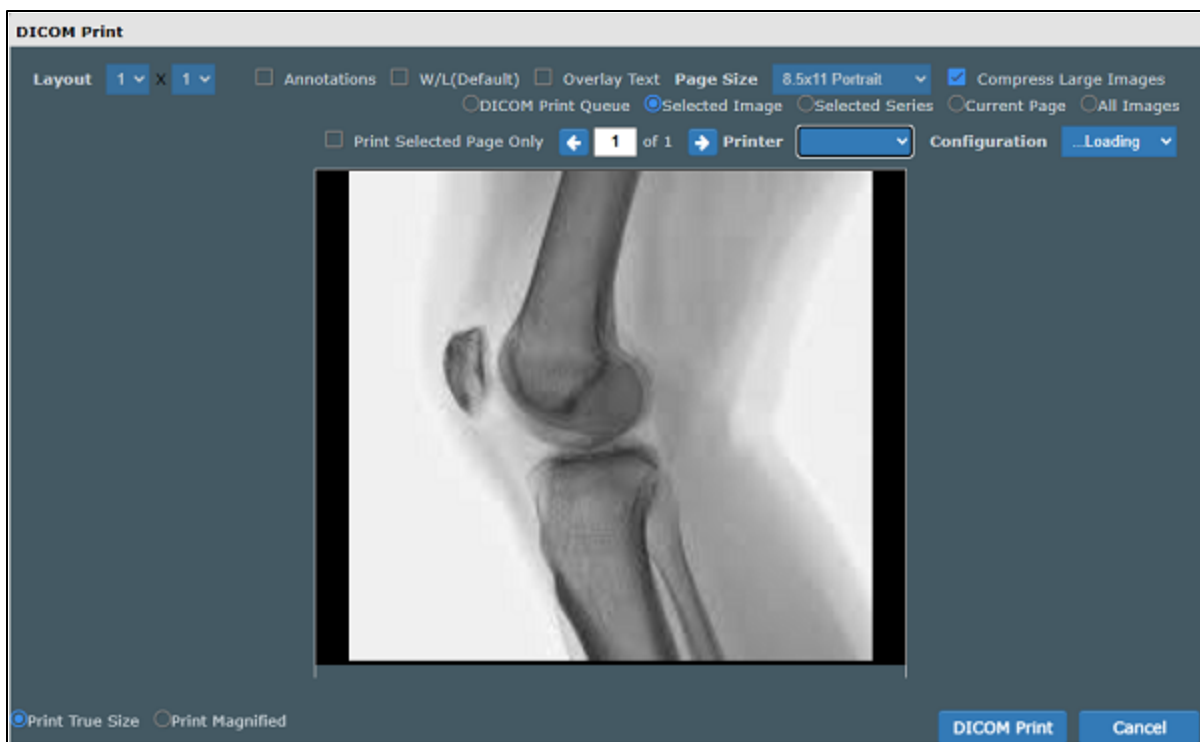
Note: You cannot print multiframe MR/CT or MG tomography images, or US echocardiography series.



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           | Select to print selected image, selected series, current page of images, key images, or all images.                                                                           |
| Selected Series          |                                                                                                                                                                               |
| Current Page             |                                                                                                                                                                               |
| Key Images               |                                                                                                                                                                               |
| All Images               |                                                                                                                                                                               |
| Layout                   | Select Selected Series above, and then adjust the frame layout.<br>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.                                                                                               |
| Page Size                | Select the paper size and print orientation.                                                                                                                                  |
| Compress Large Images    | Select to compress large images (for lower quality but faster printing).                                                                                                      |
| 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 <a href="#">Configure a DICOM printer</a> .                                    |

| Setting         | Description                                                                                                          |
|-----------------|----------------------------------------------------------------------------------------------------------------------|
| True Size       | Available in 1UP mode. Select to print in the original size and resolution.                                          |
| Print Magnified | Fills the print area with the image, stretching 1:1 (horizontally:vertically) until the first constraint is reached. |

4. Select DICOM Print.

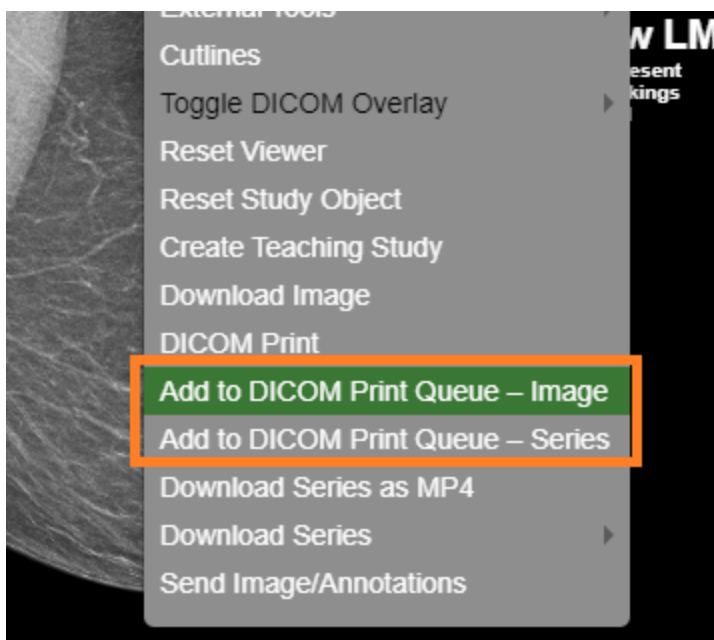
### Use the DICOM print queue

You can add images and series to the DICOM print queue, and then print everything in the queue at once.

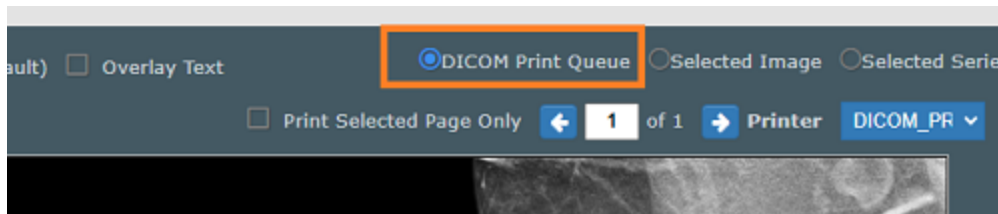
1. On an image shortcut menu, select Add to DICOM Print Queue - Image or Add to DICOM Print Queue - Series.



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.

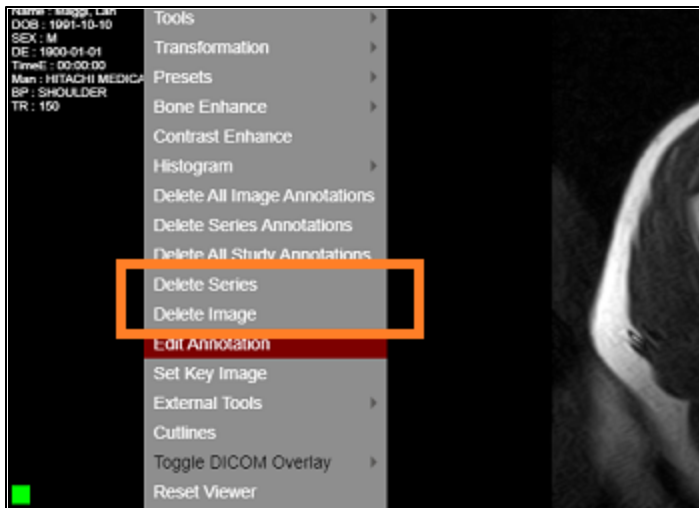


### Prerequisite:

- 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. In this topic we primarily use PowerScribe as an example.



#### Prerequisites:

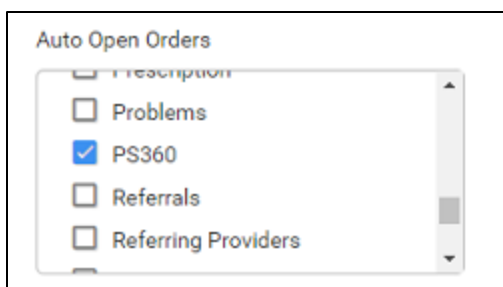
- Install Exa Launch
- Add a trusted IP or URL

#### 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.

| Monitor                                      | Current               | Prior                 | Full Screen              | Orders | Type | Calibration Width (mm) | Calibration Height (mm) |
|----------------------------------------------|-----------------------|-----------------------|--------------------------|--------|------|------------------------|-------------------------|
| <input checked="" type="checkbox"/> DISPLAY1 | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | PS360  |      |                        |                         |

3. In the row's Orders dropdown list, select the application (such as PS360).
4. In the left pane, select INTERFACE.
5. Under Other Toolbar, in the Auto Open Orders group, select the application (such as PS360).



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, such as PowerScribe.                                                                                                                                                                             |
| 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.<br>Symmetry PACS supports the following arguments:<br>{{account_no}} (patient ID)<br>{{id}} (study ID)<br>{{accession_no}}<br>{{facility_id}}<br>{{username}}<br>{{user_id}} |

| Setting                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                     | <p> {{patientName}}<br/> {{patientDOB}}<br/> {{patientSex}}<br/> {{studyDescription}}<br/> <br/> {{series_uid}}<br/> {{image_uid}} </p> <p>Example</p> <p>For PowerScribe, set the argument as follows.</p> <p>patient_id={{account_no}}&amp;accession_no={{accession_no}}&amp;cmd=powerscribe&amp;study_id={{id}}</p> <p>To base-64 encode the URL, surround the arguments with the \$\$ marker. For example:</p> <p>exal://launch/q=\$\$patient_id={{account_no}}&amp;accession_no={{accession_no}}&amp;cmd=powerscribe&amp;study_id={{id}}\$\$</p> |
| 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](#)

[Draw freehand lines](#)

[Draw a curved shape](#)

[Add text](#)

### 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  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<sup>2</sup>), 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<sup>2</sup>); 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](#)

[Add basic 3D spine labels](#)

[Add 3D spine labels](#)

[Use a spine label shortcut](#)

## 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](#)

[Add a 3D point](#)

[Add a 3D ray](#)

[Add a 3D ROI](#)

[Add a 3D length measurement](#)

[Add a 3D angle measurement](#)

## 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<sup>2</sup>), 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](#)

[Edit annotations](#)

[Saving and deleting annotations](#)

[Annotate series](#)

[Annotate tagged images](#)

[Reset an image in the viewer](#)

## 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 Symmetry PACS viewer, open a series.
2. On the toolbar, select the Annotate Series  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.

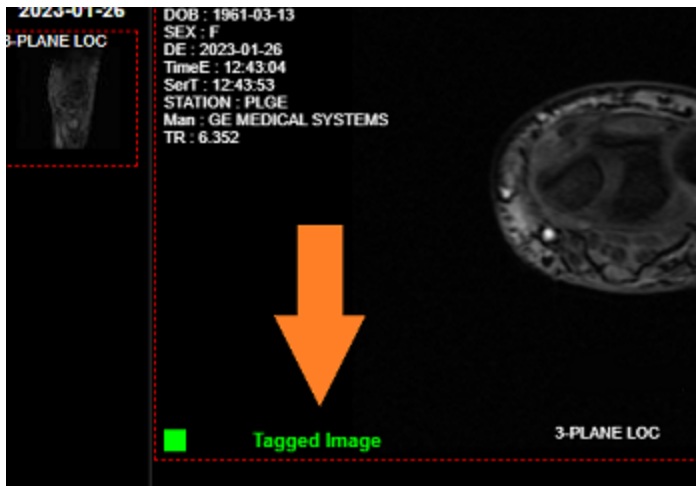


Prerequisite: [Add the relevant toolbar tools.](#)

### Procedure

1. Open series or multiple images in the Symmetry PACS viewer.
2. On the viewer toolbar, select the Tag Images  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  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](#)

[Show or hide annotations](#)

[Show series and stacks](#)

[Show or hide cutlines](#)

[Split series by slab thickness](#)

[Recalibrate the scale](#)

[Change the series layout](#)

[Reorder a series](#)

### Show or hide overlays

You can turn overlays on or off. This includes PR (GSPS) DICOM objects from Intelera, 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.](#)

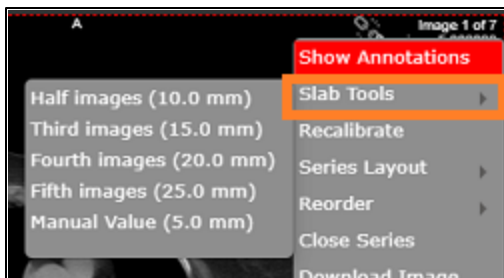
- On the viewer toolbar, select the cutlines  button.

## Split series by slab thickness

You can use slab tools to split series by image thickness.

### Procedure

- In the upper-right corner of a frame, right-click the menu icon .
- In the shortcut menu, select Slab Tools, and then select a slab thickness.

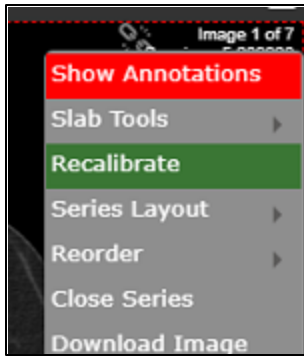


## Recalibrate the scale

You can manually recalibrate the scale measurement, which is shown on the caliper of the current series.

### Procedure

- In the upper-right corner of a frame, right-click the menu icon .
- In the shortcut menu, select Recalibrate.



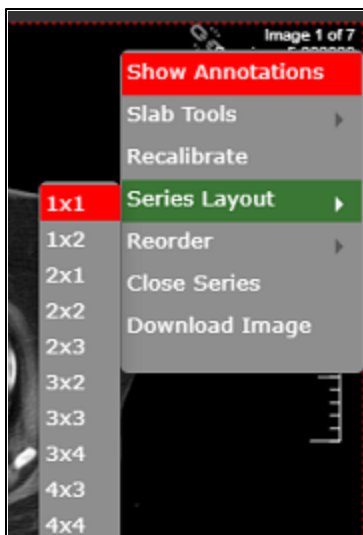
3. In the dialog, type a new value (mm) for the scale, and then select OK.

## 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.

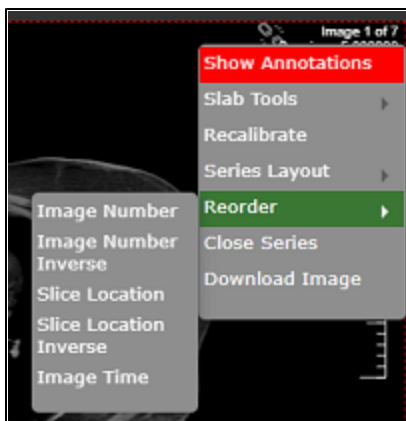


Image Number – Arranges the images by number in ascending order.

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](#)

[Adjust the window/level](#)

[Apply a window/level preset](#)

[Turn on auto window/level](#)

[Apply CLAHE enhancement](#)

[Apply bone enhancement](#)

[Invert colors](#)

[Add color to images](#)

[Apply sigmoid processing](#)

[Reset and Reset study object](#)

[Add to new UNQ study](#)

## 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

Note: Subtraction (such as in a Digital Subtraction Angiogram) is not supported. As a work-around, you can check for this image type and disable/ignore the LUT.

- 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.](#)

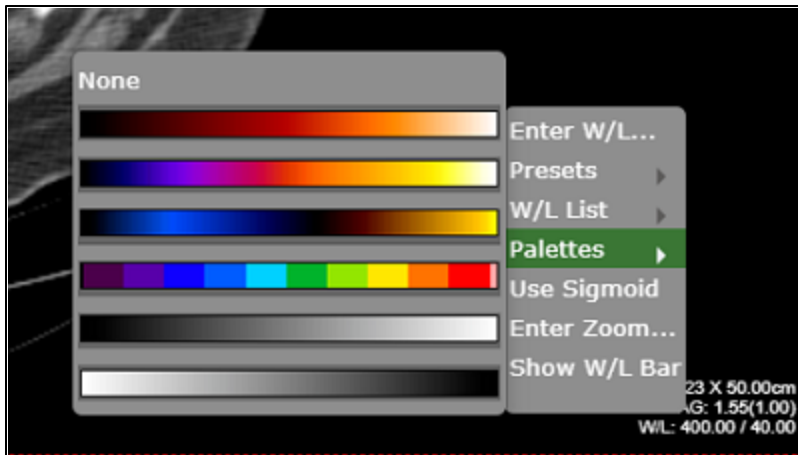
- On the viewer toolbar, select the invert colors  button.

## Add color to images

You can add color to images.

Procedure

- Right-click the overlay in the lower-right of the image, and then in the shortcut menu, select Palettes.



- 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](#)

[Display one to one](#)

[Display images in their actual size](#)

[Fit images to window](#)

[Use the magnifying glass](#)

## 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.

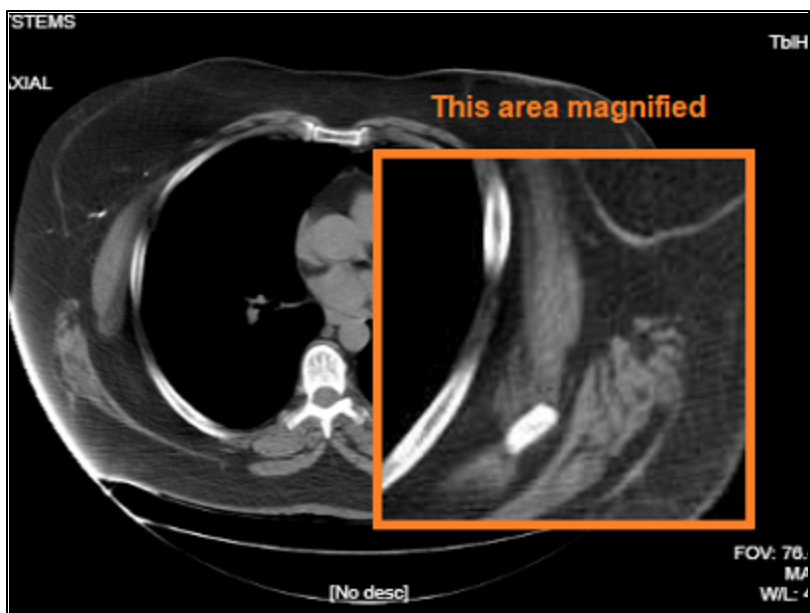
## Use the magnifying glass

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 go 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 going to images

The following topics are contained in this section.

[Pan images](#)

[Move or span through images](#)

[Flip or rotate images](#)

[Play cine loops](#)

[Use key images](#)

[Open a series image in a 1×1 frame](#)

[Go to a BTO image by SR finding](#)

[Triangulate images](#)

### 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 open at any time. You can add key image thumbnails on reports.



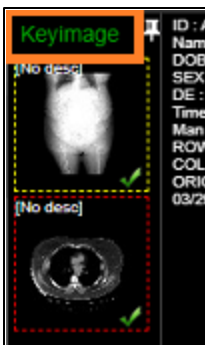
Prerequisite: [Add the relevant tools to the image shortcut menu.](#)

### 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.

### Open 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.

## Go 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.

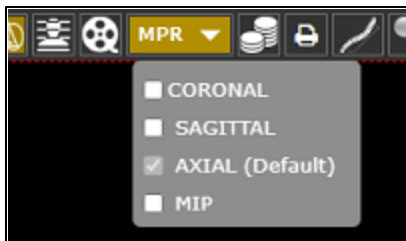


### Prerequisites:

- 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.

See also:

[Perform standard MPR](#)

[Handle MPR images](#)

[Save an MPR series](#)

## 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.

See also:

[Perform simple MPR](#)

[Handle MPR images](#)

[Save an MPR series](#)

## 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.

See also:

[Perform simple MPR](#)

[Perform standard MPR](#)

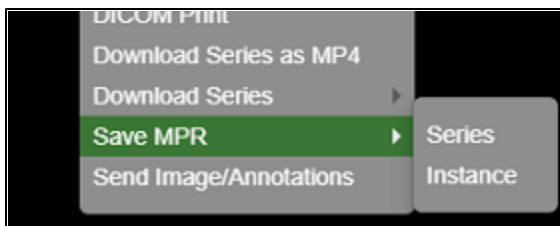
[Save an MPR series](#)

## Save an MPR series

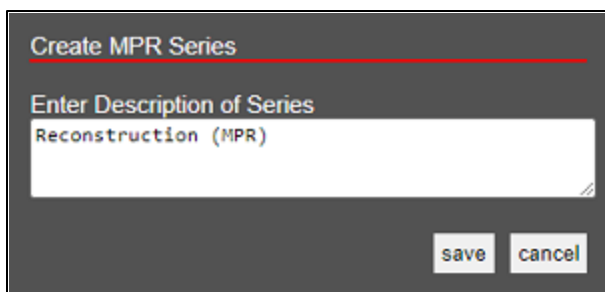
After you perform MPR, you can save the resultant images and series for later viewing.

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.



Create MPR Series

Enter Description of Series

Reconstruction (MPR)

save cancel

Result: A thumbnail for the saved instance or series appears on the thumbnail bar.

See also:

[Handle MPR images](#)

## Work with PET fusion studies

The following topics are contained in this section.

[Turn PET fusion display on and off](#)

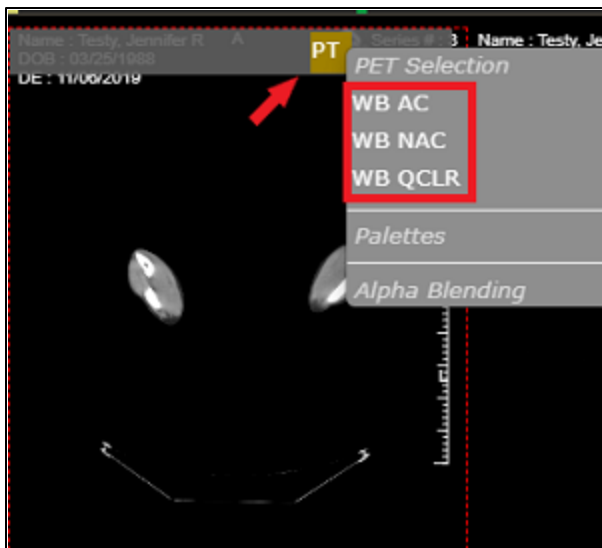
[Color and blend PET fusion source studies](#)

### 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

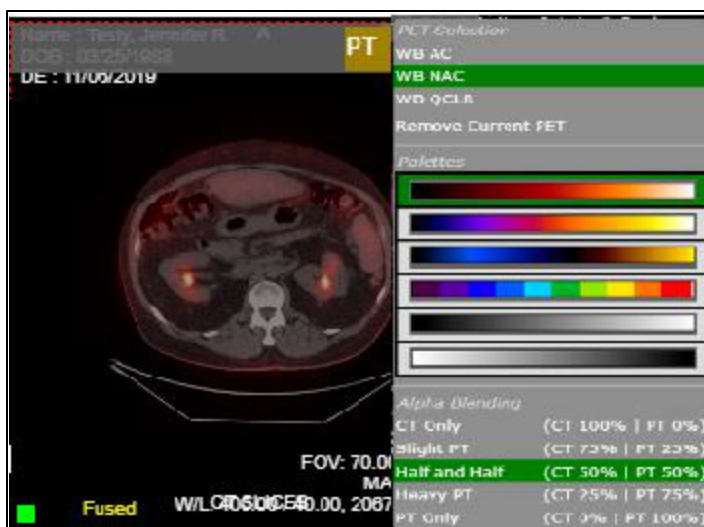
You can add color to source studies in a PET fusion study, and control alpha blending of the two studies. Specifying a color in one image applies the color to all images in the series.



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](#)

[Display DICOM values](#)

[Export DICOM values](#)

[Print images to a standard printer](#)

[Open a third-party application or function](#)

[Download images](#)

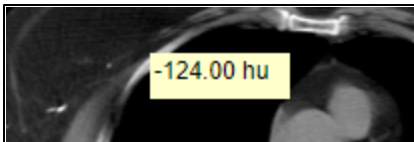
## View pixel values in Hounsfield units

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  | 20230328                            |

## 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

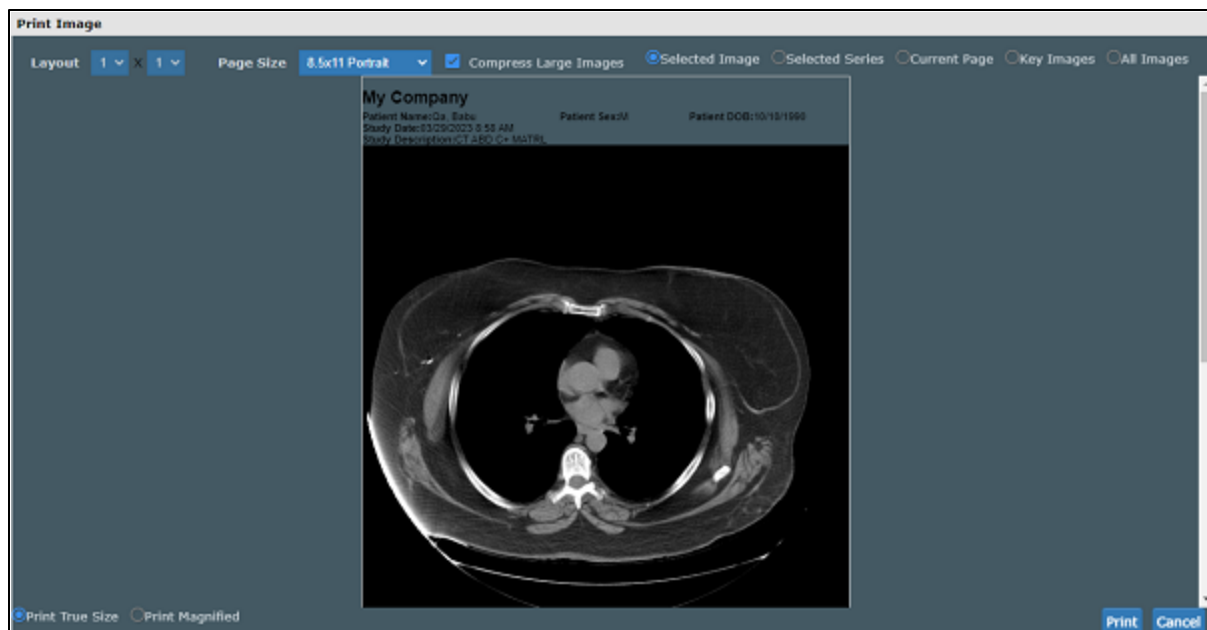
You can print the current image, series, or study to a TWAIN (non-DICOM) printer. It is a convenient, less-expensive alternative to DICOM printing, but is not suitable for diagnostic purposes. See also [DICOM-print a study](#).



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.



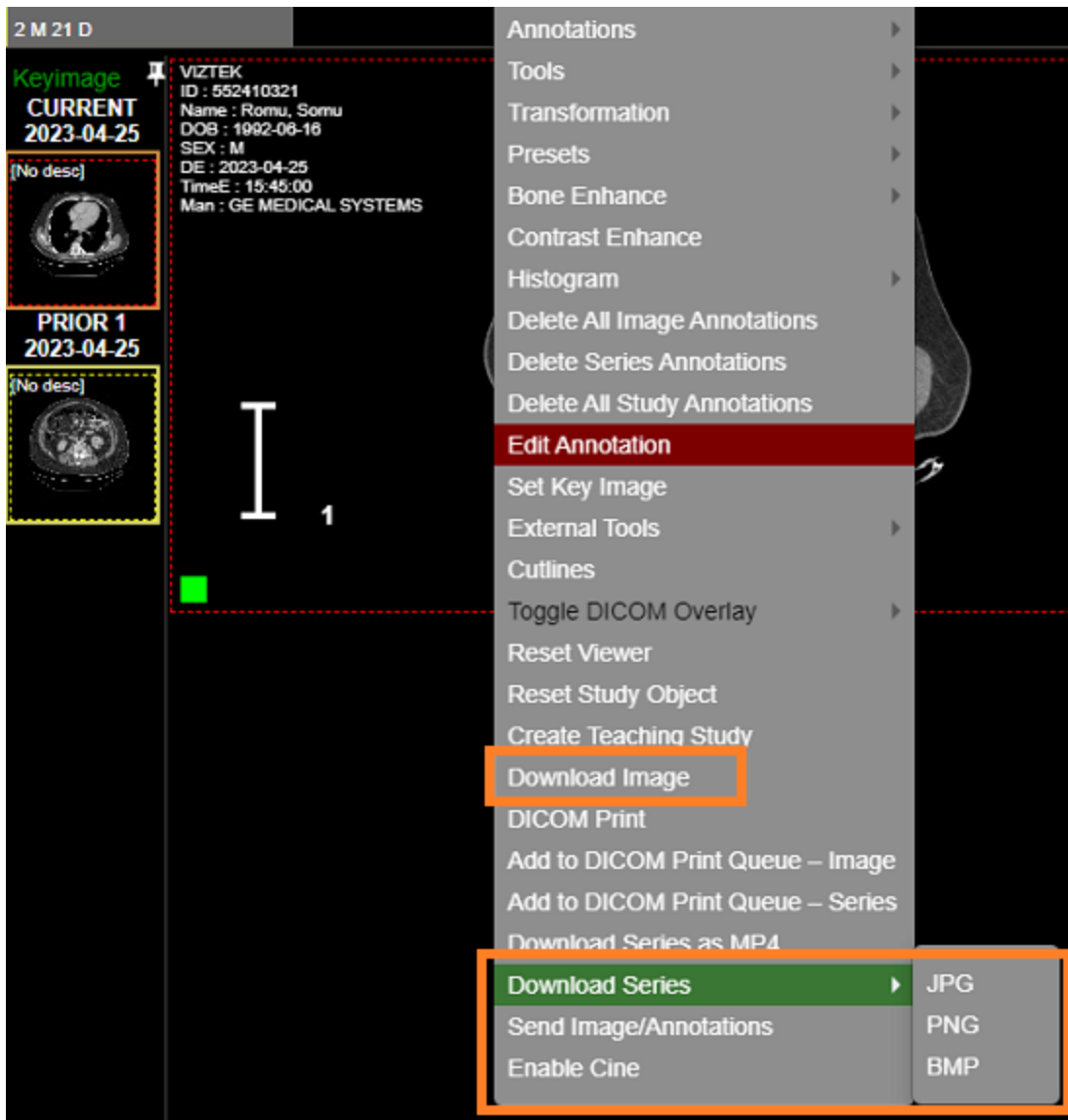
Prerequisites: [Configure opening of a third-party program](#)

- 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.

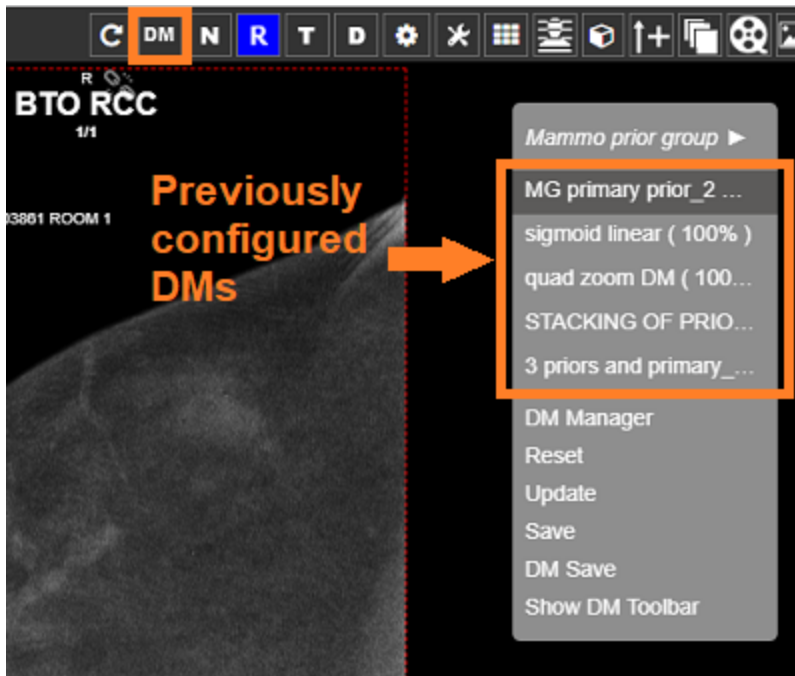
- Manage: Opens the DM manager.
- Reset: Select to apply any newly created or edited DMs.
- Refresh: You can also *refresh* DMs to update the list of applicable DMs.
- [DM]: Select any DM on the DM toolbar to apply it in the viewer.

## 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.



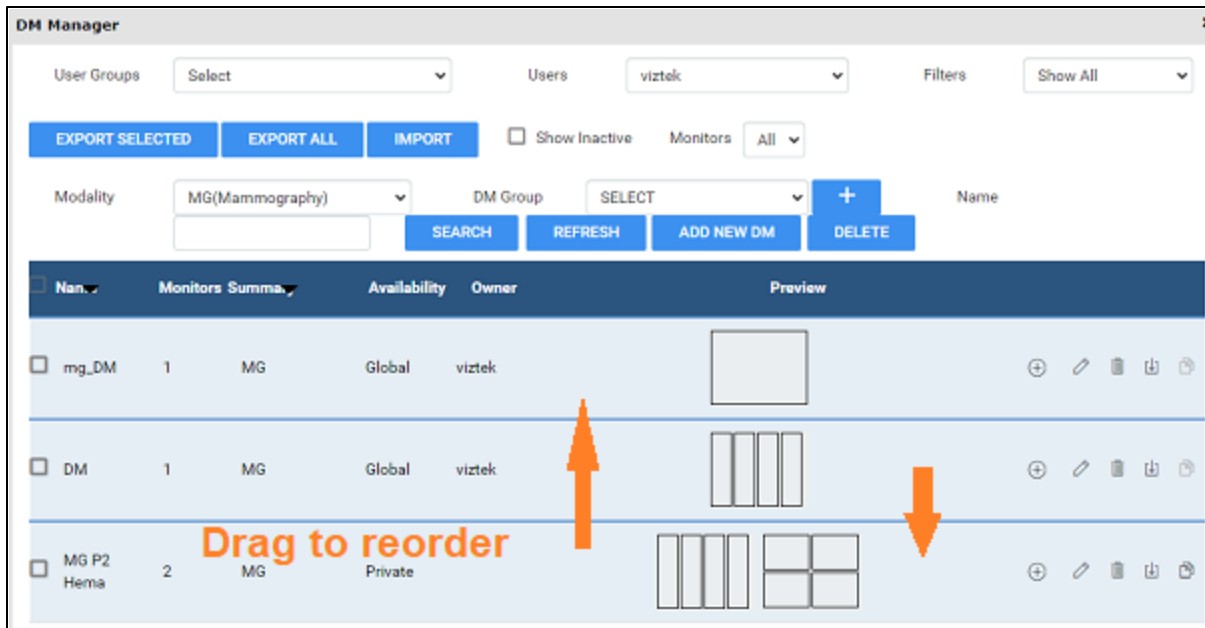
Result: Images hang according to the settings in the DM. When multiple images hang in a single cell, they appear in the same order as in the DM.

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 **DM** 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.

- 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   | Facility admins only. Select the group to which the DM user belongs.              |
| Users         | Facility admins only. Select users associated with the DM.                        |
| Filters       | Facility admins only. Select whether the DM is private (user-specific) or public. |
| Export/Import | Not used for searching, see <a href="#">Export and import DMs</a> .               |
| 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.                                           |

- Select SEARCH.

Result: DMs matching your search criteria appear in the list at the bottom of the dialog.

- 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 – Select DMs to add to a group, select Add, and then select a DM group to which to add the DMs.

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 Symmetry PACS 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](#)

[About missing cells](#)

[Create a DM from an existing layout](#)

[Export and import DMs](#)

## 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  button, and then select DM Manager.
3. In the DM Manager dialog, select ADD NEW DM.

| Name  | Monitor:Summary | Availability | Owner  | Preview |
|-------|-----------------|--------------|--------|---------|
| mg_DM | 1               | MG           | Global | viztek  |

4. In the second DM Manager dialog, enter the following settings.

**HP Properties**

Name \*  ☐ Inactive ☐ Private

HP Identifier **Modality**

Modalities \* **CT**

Body Part

| 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.<br>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.<br>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](#)).

**Preview** 8% ← **Monitors \*** 3

1\*1

1\*1

1\*2

1\*1

1\*1

2\*2

1\*1

1\*1

1\*1

1\*1

**Validation percentage must be 100% for the DM to hang**

Figure. In this example, 3 monitors are configured, with 1, 2, and 4 cells added to each monitor, respectively. On the second page, Allow Missing Cells is selected at the monitor level, which means that either the left, right, or both cells do not have to match. On the third monitor, 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).                                                                                      |
| 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.

The screenshot shows the 'DISPLAY MANAGEMENT' sub-tab. At the top, there are two tabs: 'MATCHING RULES' and 'DISPLAY MANAGEMENT', with the latter being active. An 'UPDATE' button is in the top right. The settings are organized into several groups:

- Auto-Orient** (Blank to Disable): A dropdown menu.
- Right Edge** and **Bottom Edge**: Two input fields.
- Rotation** (Clockwise): A dropdown menu set to 'None' and a checkbox for 'Mirror'.
- View (Zoom)**: A dropdown menu set to 'Fit to Winc'.
- LUT**: A dropdown menu set to 'Auto'.
- Bone Enhance**: A dropdown menu.
- Window/Level**: Radio buttons for 'Default' and 'Custom', with two input fields for 'Custom'.
- Reprocess**: A dropdown menu set to 'Select'.
- Checkboxes**: A group of checkboxes including 'Invert', 'Sigmoid', 'Linear', 'CLAHE', 'Fusion', 'CAD', and 'Current MG Only'.

| Setting     | Description                            |
|-------------|----------------------------------------|
| Auto-Orient | [Unused]                               |
| Rotation    | Select a degree of clockwise rotation. |

| Setting         | Description                                                                                                            |
|-----------------|------------------------------------------------------------------------------------------------------------------------|
| Mirror          | Select to switch the left and right breast view.                                                                       |
| View            | Select a zoom type.                                                                                                    |
| Invert          | Select one or more processing functions to apply.                                                                      |
| Sigmoid         |                                                                                                                        |
| Linear          |                                                                                                                        |
| CLAHE           |                                                                                                                        |
| Fusion          |                                                                                                                        |
| CAD             |                                                                                                                        |
| Current MG Only | 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.

However, if you select Allow Missing Cells (AMC) in every cell, and no images match any of the cells, a blank screen is displayed. In this sense, Allow Missing Cells can be *too* flexible.

Rules of thumb:

- Select AMC in an *individual cell* if the image does not need to match that cell for the rest of the DM to hang.
- Select AMC at the *page level* to allow the DM to hang if 2/3 of the cells match.

## Create a DM from an existing layout

To create a DM more quickly, you can arrange a layout in the viewer, save it as a DM, and then modify the DM rules suit your needs. 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.
- For example, if DM Save W/L is selected in modality settings, applying the DM applies the saved W/L settings.
- To ensure proper hanging and rendering, review the resultant rules in both the MATCHING RULES and DISPLAY MANAGEMENT tabs and modify if necessary.

### Procedure

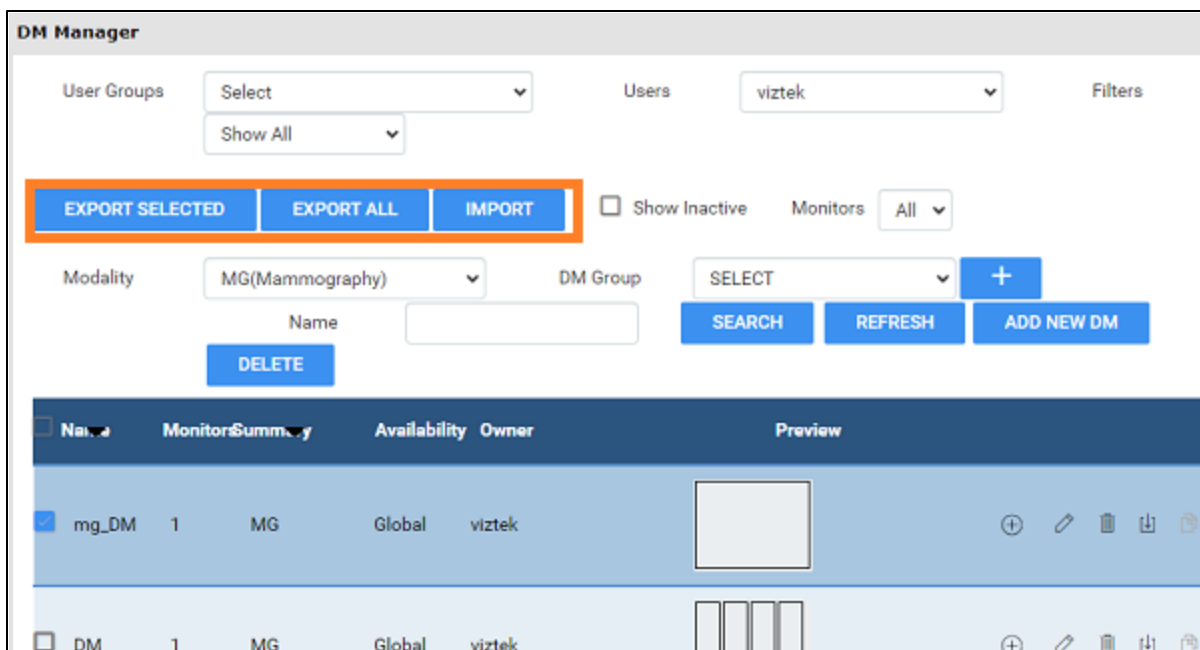
1. Open a study in the viewer and configure the display to your liking.
2. On the toolbar, select the DM button, and then in the button shortcut menu, select DM Save.
3. In the DM Information dialog, type a name for the DM and select or clear the Private checkbox.
4. Select SAVE.

## 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.



| Name                                      | Monitors | Summary | Availability | Owner  | Preview                                                                              |
|-------------------------------------------|----------|---------|--------------|--------|--------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> mg_DM | 1        | MG      | Global       | viztek |  |
| <input type="checkbox"/> DM               | 1        | MG      | Global       | viztek |  |

3. Select EXPORT SELECTED or EXPORT ALL (exports all DMs in the system).

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](#)

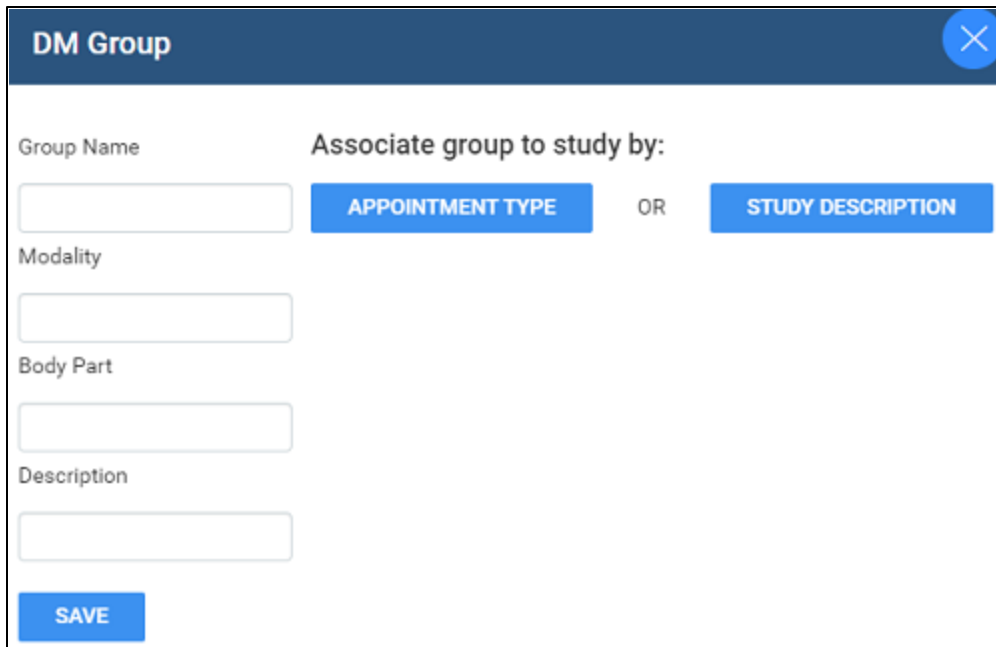
[About DM groups and private DMs](#)

## 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.
2. On the HANGING PROTOCOLS tab, under DM Group, select the plus  button.
3. In the DM Group dialog, on the left, type descriptive information for your DM group.



The image shows a 'DM Group' dialog box with a dark blue header and a close button (X) in the top right corner. The dialog is divided into two main sections. On the left, there are four input fields labeled 'Group Name', 'Modality', 'Body Part', and 'Description'. On the right, under the heading 'Associate group to study by:', there are two blue buttons: 'APPOINTMENT TYPE' and 'STUDY DESCRIPTION', separated by the word 'OR'. At the bottom left of the dialog is a blue 'SAVE' button.

4. 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.

5. 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. Select the DM button, and on the button shortcut menu, select DM Manager.
4. Select the relevant modality and then select 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](#)

[Create and modify a patient chart](#)

## 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](#)

[Find a patient chart by scanning a driver's license](#)

[Access confidential patient records \(break the glass\)](#)

## 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.

**Patient** ⓘ

< **SEARCH** PATIENT INFORMATION PATIENT GUARANTOR PATIENT ALERTS INSURANCE PROFILES STUD

Starts With ▾ All ▾ ☒ Show Inactive ☐ Break the Glass

test First Name MRN SSN Phone DOB Add

ZIP

🔍 CREATE NEW SCAN LICENSE CLEAR SEARCH IMPORT PATIENT ?

**PATIENT SEARCH RESULTS** RECENT PATIEN

|                                                                                                                              |    |
|------------------------------------------------------------------------------------------------------------------------------|----|
| <b>Test, Ex - tesE1145</b><br>DOB: 09/09/1999, (098)765-4321, (123)456-7890<br>address 1, address 2<br>SCHENECTADY, NY 12345 | ⚙️ |
| <b>test, Poojaa - 456</b><br>DOB: 05/15/2019                                                                                 |    |
| <b>Test, Table - test1144</b><br>DOB: 09/09/2000                                                                             |    |

5. Double-click a patient row, such as Test, Table in the figure above.  
Result: The patient chart opens to the Patient Information tab.

**Patient**

**Test, Table** DOB: 09/09/2000 MRN: test1144

< SEARCH **PATIENT INFORMATION** PATIENT GUARANTOR PATIENT ALERTS INSURANCE P

**Patient Information** **[more]** PORTAL ACCOUNT SCAN LICENSE INQUIRY CHECK-IN CODE

Market **NONE SELECTED**

Facilities \* **MY COMPANY**

DICOM Patient ID

Account No./Alt \* test1144 ⓘ **MANAGE ALTERNATE ACCOUNT NUM / IDENTIFIERS**

Name \* table MI test  
Suffix ★

Alias First Name Last Name

DOB \* 09/09/2000 ⓘ Sex \* M

Marital Status Select Height (ft/in)

Smoking Status Select ⓘ Weight (lbs.)

- To view more fields, click [more].
- 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.

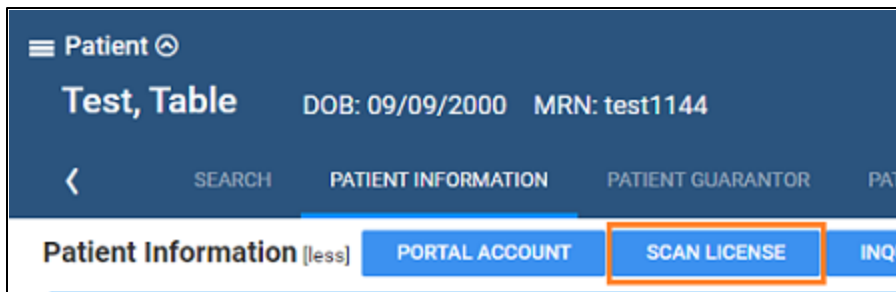
### Procedure

- 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.

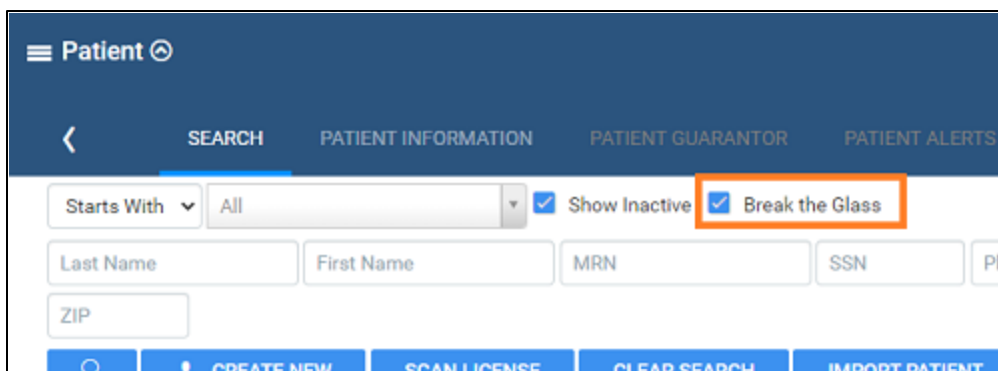


### Prerequisites:

- 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](#)

[Move DICOM studies between patient charts](#)

[Manage study forms in the patient chart](#)

## Create a patient chart

You can [import a patient chart](#), or create one by following the steps below.



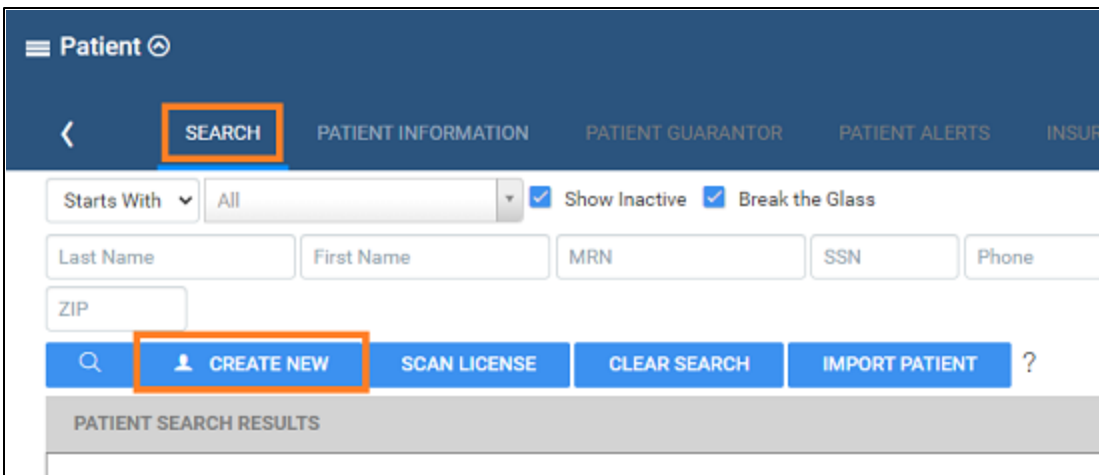
Caution: For recommended security, please [turn off Chrome autofill](#). A password and/or patient information is configured or used on this page.

### 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.



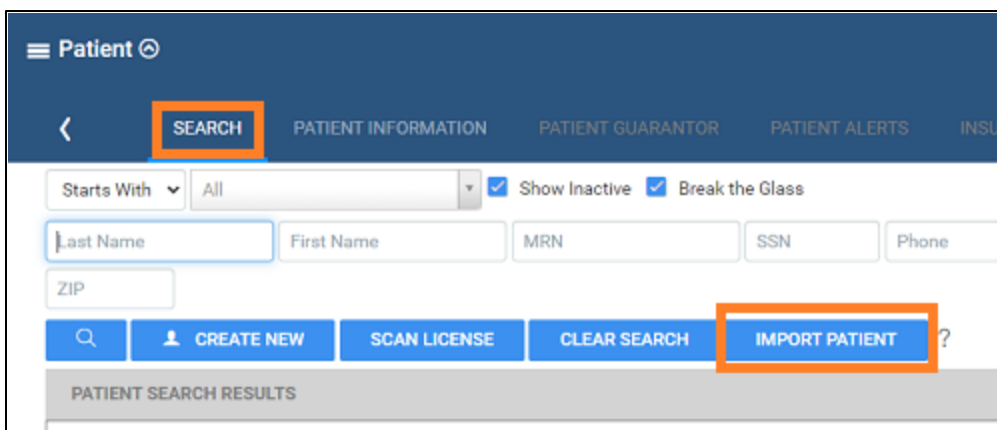
Note: To view which options must be present for the update to be successful, select the help ? button on the right side of the PATIENT IMPORT button.

### Procedure

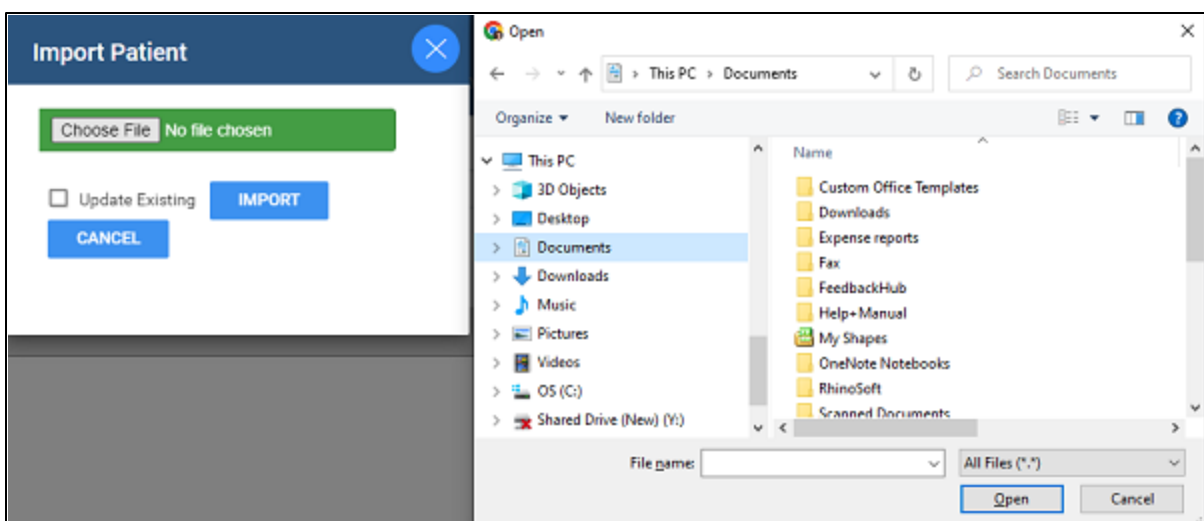
1. Go to [PATIENT](#) > SEARCH > IMPORT PATIENT.



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.

**Patient Information [less]**

Market: NONE SELECTED

Facilities: MY COMPANY

DICOM Patient ID: [Text Field]

Account No./Alt: [Text Field] [Text Field]

MANAGE ALTERNATE ACCOUNT NUM / IDENTIFIERS

Name: First Name [Text Field] MI [Text Field] Last Name [Text Field] Suffix [Text Field] ★

Alias: First Name [Text Field] Last Name [Text Field]

DOB: YYYY-MM-DD [Text Field] [Calendar Icon] Sex: Select [Dropdown]

Marital Status: Select [Dropdown] Height (ft/in): [Text Field]

Smoking Status: Select [Dropdown] Weight (lbs.): [Text Field]

Racial/Ethnic: ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or Other Pacific Islander

Patient Flag: Select [Dropdown] Language: Select [Dropdown]

SSN: [Text Field] HIE Consent: Select [Dropdown]

Physician: Search Physician [Text Field] [Dropdown]

Ordering Facility: No Ordering Facility Location Selected [Text Field] [Search Icon]

Actual settings may vary by region and version

| Setting | Description                                |
|---------|--------------------------------------------|
| Market  | Select the markets that serve the patient. |

| Setting                                                                        | Description                                                                                                                                                                                                                    |
|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Facilities                                                                     | Select facilities that serve the patient.                                                                                                                                                                                      |
| DICOM Patient ID                                                               | Type the PID or patient MRN.                                                                                                                                                                                                   |
| Account No./Alt.                                                               | Type the patient's account or alternate account number. See <a href="#">About the PID, MRN, and account numbers</a>                                                                                                            |
| Name                                                                           | Type the patient's first, and last name.<br>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.<br>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.<br><br>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:

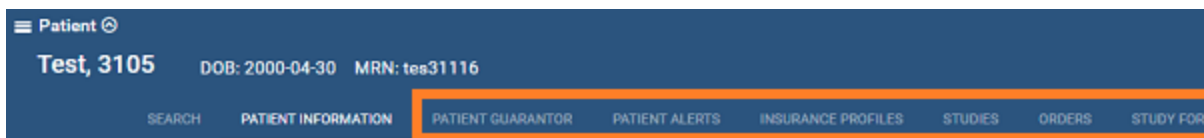
### Procedure

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  | <a href="#">Assign a guarantor for a patient</a>                                       |
| PATIENT ALERTS     | <a href="#">Assign or remove patient alerts</a>                                        |
| 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          | <a href="#">View or add patient documents</a>                                          |
| PAYMENT HISTORY    | View payment history and print receipts                                                |
| ACTIVITY LOG       | <a href="#">View activity logs</a>                                                     |
| NOTES              | <a href="#">Enter notes and reasons for study</a><br><a href="#">Open the call log</a> |

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 (see [Add alternate account numbers to a patient chart](#)). 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

### 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. See [Merge patient charts](#).

### Move DICOM studies between charts

Besides merging entire patient records with alternate account numbers, you can also move individual DICOM studies from one chart to another. See [Move DICOM studies between patient charts](#).

### 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 Symmetry PACS in such cases, specifying issuers and alternate account numbers ensures that patients with duplicate primary PIDs/MRNs can be added without conflicts.

For more information on PIDs and alternate account numbers, see [Configure alternate account number functionality](#).

## Configure alternate account number functionality

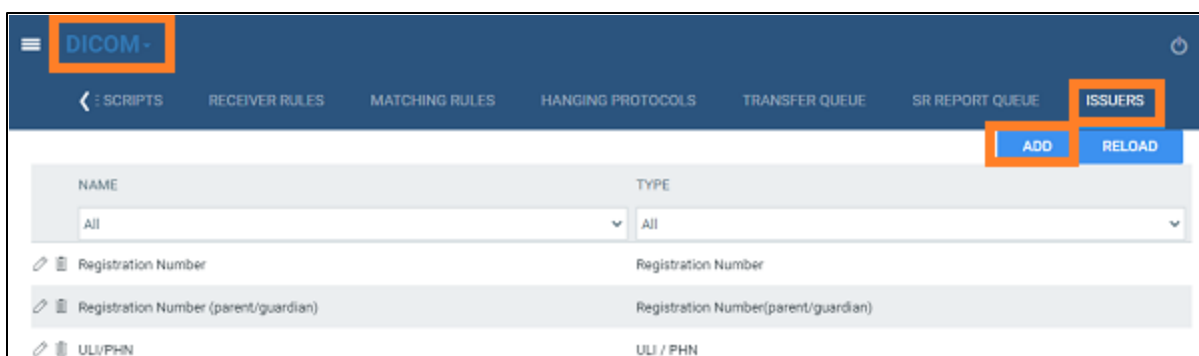
To be able to use [alternate account numbers](#), perform the following procedures. Alternate account numbers can be PIDs or MRNs, and in Canada they can also be ULI/PHNs or registration numbers.

### Configure an issuer of a PID

The *issuer of a PID* is an alias for the facility that assigned 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. Symmetry PACS 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.

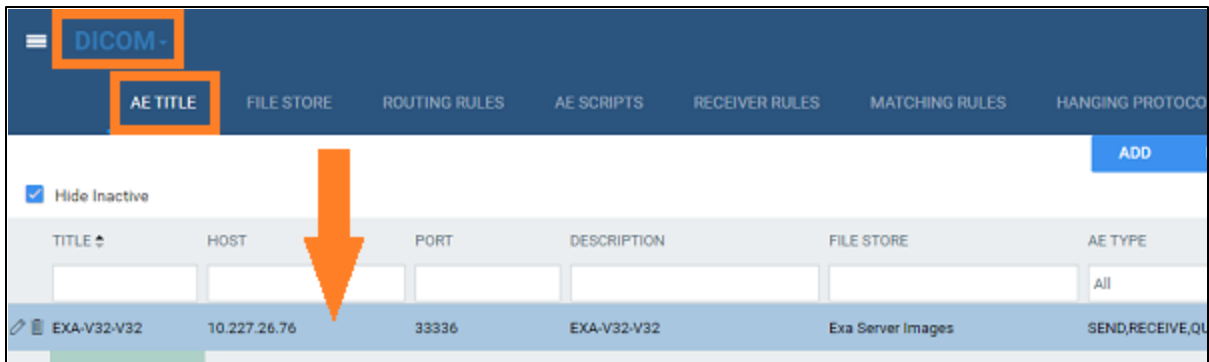
5. Optional: In the Pattern Test box, type a known alternate account number to make sure it matches your regular expression.

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.

Issuer Type \* ☐ None ☒ Static ☐ Dynamic

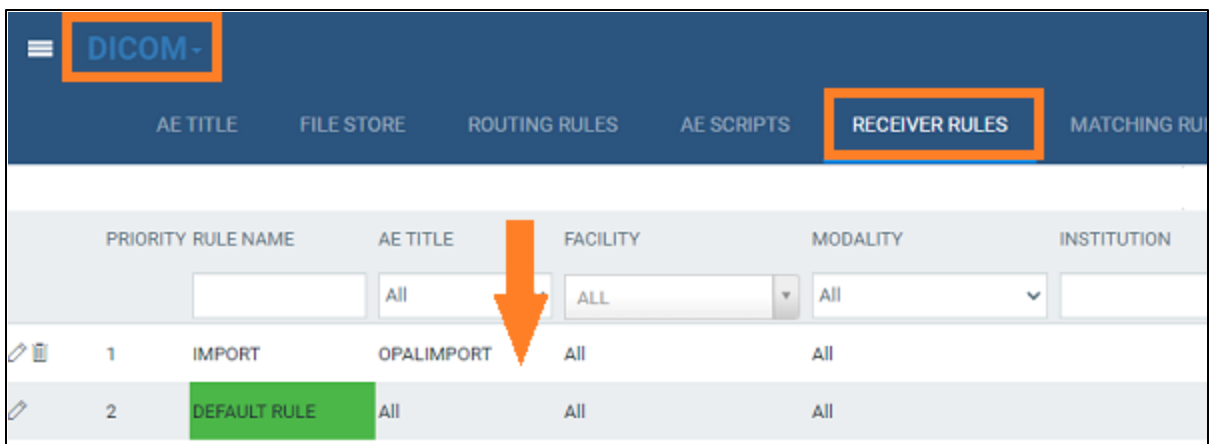
Issuer \*

4. Select SAVE.

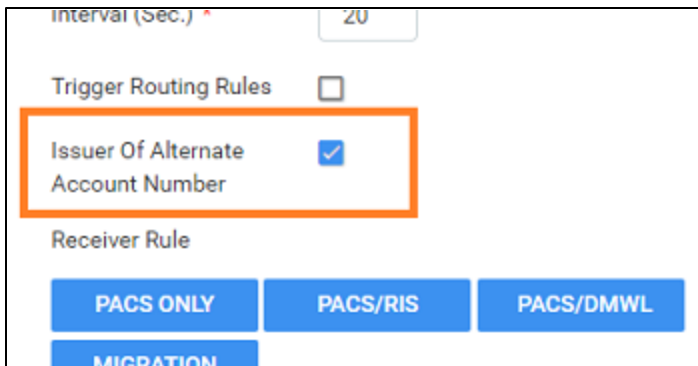
### Configure a receiver rule for use with alternate account numbers

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.



- Under Rule Information and Filter, select the Issuer of Alternate Account Number checkbox.



The screenshot shows a configuration window with the following elements:

- Interval (Sec.) \* 20
- Trigger Routing Rules ☐
- Issuer Of Alternate Account Number ☒ (This checkbox is highlighted with an orange rectangle)
- Receiver Rule
- Buttons: PACS ONLY, PACS/RIS, PACS/DMWL, and MIGRATION (partially visible)

- 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

- Open the patient chart to which you want to add alternate account numbers (see [Find a patient chart by entering search criteria](#)).
- On the PATIENT INFORMATION tab, select MANAGE ALTERNATE ACCOUNT NUM/IDENTIFIERS.

**Patient** ☰ Patient ⓘ

**Test, Poojaa** DOB: 05/15/2019 MRN: 456

< SEARCH **PATIENT INFORMATION** PATIENT GUARANTOR PATIENT ALERTS

**Patient Information** [less] PORTAL ACCOUNT SCAN LICENSE INQUIRY CHECK

Market NONE SELECTED ▾

Facilities \* NIRMILLA TEST FACIL...

DICOM Patient ID

Account No./Alt \* 456 ⓘ

**MANAGE ALTERNATE ACCOUNT NUM / IDENTIFIERS**

Name \* Address \* MI \* test

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.

**Alternate Account Num / Identifiers**

SAVE SAVE & CLOSE BACK

Issuer Name and Type \* ULI/PHN - ULI / PHN ▾

Alternate Account Num / Identifiers \* 123456789 ✓ Text matches pattern

Must be a 9-digit number

☐ Primary

Country \* Canada ▾

State/Province Alberta ▾

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

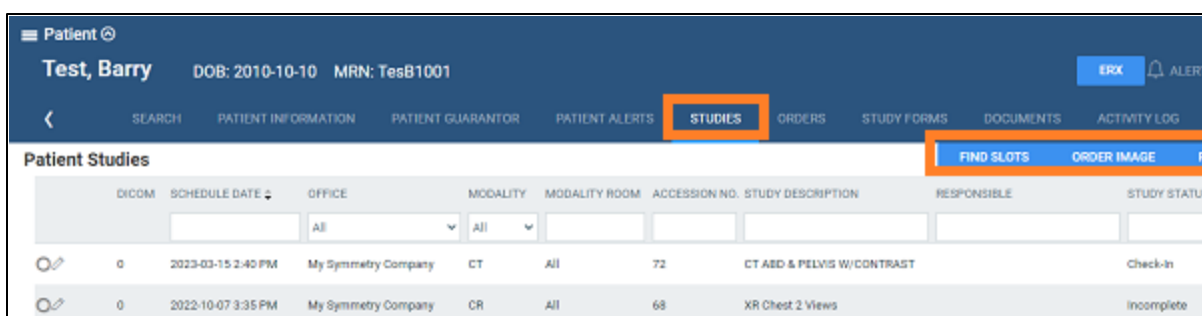
From the STUDIES tab of the patient chart you can view payment status and other information of prior or future studies of the patient, and create a new study with the Find Slots feature.

### 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.



| DICOM | SCHEDULE DATE      | OFFICE              | MODALITY | MODALITY ROOM | ACCESSION NO. | STUDY DESCRIPTION          | RESPONSIBLE | STUDY STATUS |
|-------|--------------------|---------------------|----------|---------------|---------------|----------------------------|-------------|--------------|
| 0     | 2023-03-15 2:40 PM | My Symmetry Company | CT       | All           | 72            | CT ABD & PELVIS W/CONTRAST |             | Check-in     |
| 0     | 2022-10-07 3:35 PM | My Symmetry Company | CR       | All           | 68            | XR Chest 2 Views           |             | Incomplete   |

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 <a href="#">Send reports from the patient chart</a> .                                                                                  |
| 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).                                                                       |
| Create a study for the patient | Select Find Slots (see Use the Find Slots feature).                                                                                                                                                                       |
| Order images                   | <ol style="list-style-type: none"> <li>1. Select a study whose images you want to order in the list, and then select ORDER IMAGE.</li> <li>2. Select the patient and/or physicians to whom to send the images.</li> </ol> |

| Task | Topic                                                                |
|------|----------------------------------------------------------------------|
|      | 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. You can also do this from the Edit Study screen (see [Add or edit a patient guarantor](#)).

### 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.

See also:

[Edit other patient information](#)

## 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.

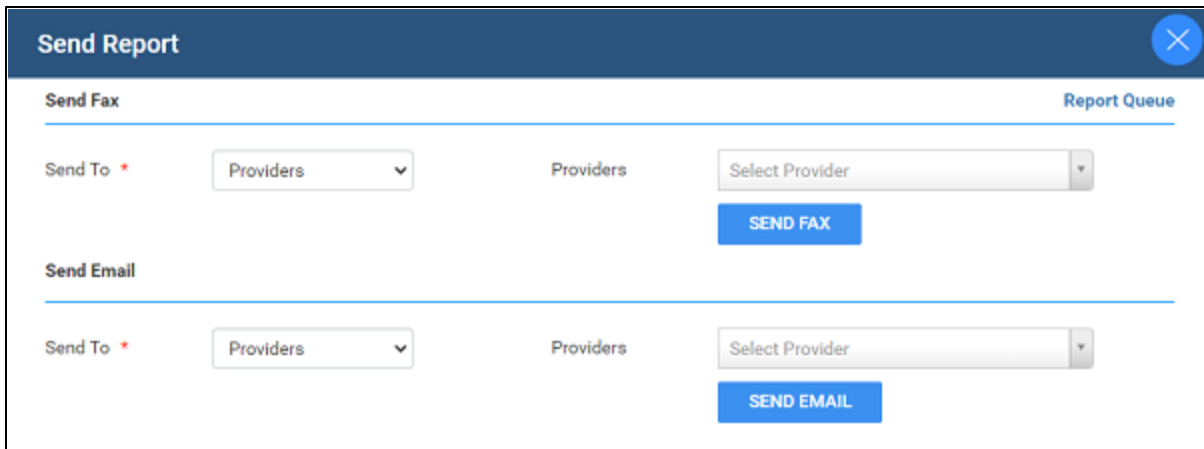
### Procedure

1. Open a patient chart, and then select the STUDIES tab.

The screenshot shows the 'Patient Studies' section of the software interface. At the top, the patient's name 'Test, Valerie' and other details are visible. The 'STUDIES' tab is selected in the top navigation bar. Below this, there are buttons for 'FIND SLOTS', 'NEW STUDY', 'WALK-IN', and 'ORDER IMAGE'. A table lists several studies. The second study, dated 02/06/2023 12:00 AM, is highlighted. A right-click context menu is open over this study, showing 'Send Report' and 'Fax/Email' options, both of which are highlighted with orange boxes.

| DICOM | SCHEDULE DATE       | OFFICE                | MODALITY | MODALITY ROOM | ACCESSION NO. | STUDY DESCRIPTION                | RESPONSIBLE | STUDY STAT |
|-------|---------------------|-----------------------|----------|---------------|---------------|----------------------------------|-------------|------------|
|       | 03/13/2023 9:40 AM  | Nirmila Test Facility | XA       | Xray          | 1246          | 3D RNDR I&R CT MRI US/OTH REQ PC |             | Cancelled  |
|       | 02/06/2023 12:00 AM |                       |          |               |               | ANORPH ADRNL UNI SUCTY RSGI      |             | Approved   |
|       | 02/05/2023 7:00 PM  | Nirmila Test Facility | XA       | Xray          | 653           | 3D RNDR I&R CT MRI US/OTH REQ PC |             | Scheduled  |

2. In the list of studies, right-click a study containing an approved report, select Send Report, and then select Fax/Email.



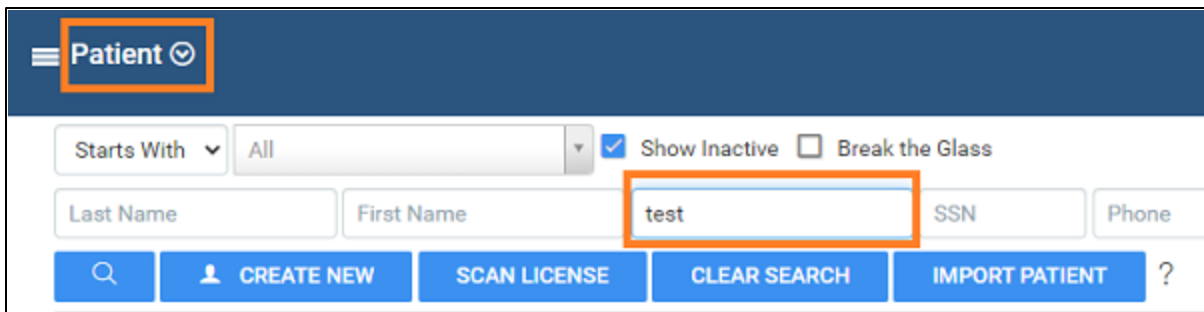
The **Send Report** dialog box is divided into two sections: **Send Fax** and **Send Email**. Each section contains a **Send To \*** dropdown menu with **Providers** selected, a **Providers** label, and a **Select Provider** dropdown menu. Below each section is a blue button labeled **SEND FAX** or **SEND EMAIL**. A **Report Queue** link is located in the top right corner of the dialog.

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

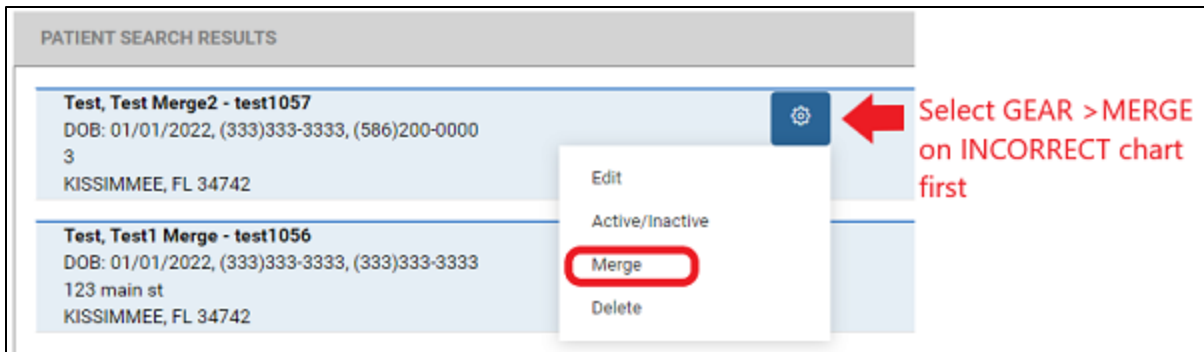
As an alternative to using alternate account numbers, if two patient charts are accidentally created for a single patient, you can merge the charts.

1. Go to [PATIENT](#) > SEARCH.
2. In the MRN box, enter the account number of the records to merge.



The **Patient** search interface shows a header with a menu icon and the word **Patient**. Below the header are search filters: **Starts With** (dropdown), **All** (dropdown), ☒ **Show Inactive**, and ☐ **Break the Glass**. The search fields include **Last Name**, **First Name**, **test** (highlighted with an orange box), **SSN**, and **Phone**. At the bottom are buttons for **SEARCH**, **CREATE NEW**, **SCAN LICENSE**, **CLEAR SEARCH**, and **IMPORT PATIENT**, followed by a help icon.

3. In the list of results, select the row containing the *incorrect* patient chart, hover and select the settings  button, and then select Merge.

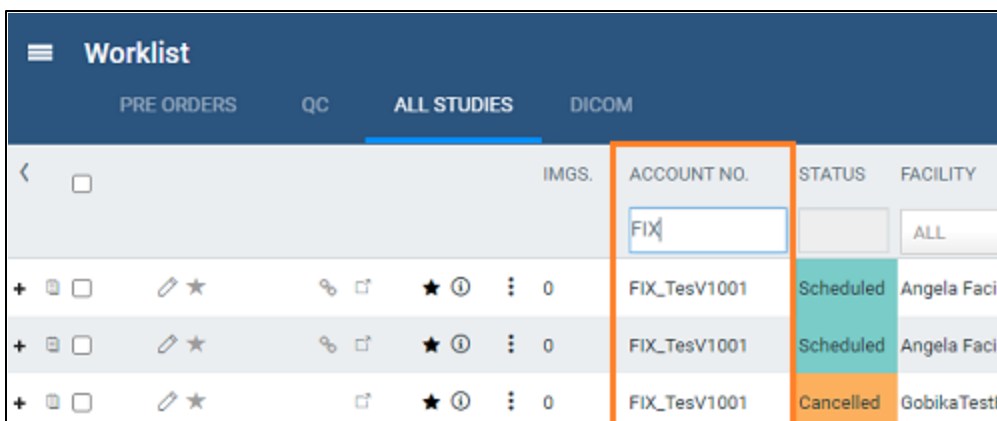


- Repeat the previous two steps for the row containing the *correct* patient chart.
- In the Patient Merge screen, confirm the contents of the merge and then select MERGE.

### 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.

- On the search bar of the worklist, in the ACCOUNT NO. box, type FIX and then select Enter.



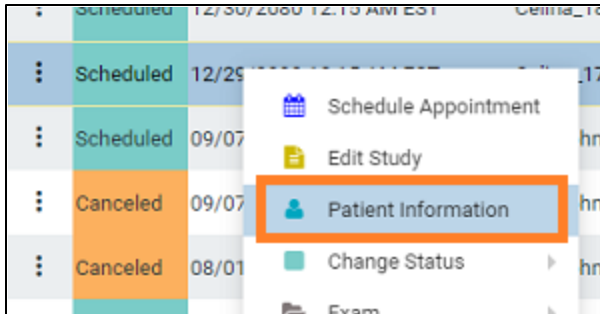
- In the list of results, copy the account number (without the “FIX\_” prefix) of a study.
- Paste the account number in the ACCOUNT NO. box, and then select Enter.
- In the list of results, compare the “FIX\_” record with the other to determine whether they are for the same patient.
- If the same, merge the records by following the earlier procedure.

## Move DICOM studies between patient charts

DICOM studies can sometimes accidentally appear in the wrong patient chart. If you need to move selected (or all) DICOM studies from one patient chart to another, follow this procedure.

## Procedure

1. Determine the correct account number for the studies.
2. On the worklist, right-click a study to move and select Patient Information.



3. In the DICOM Patient ID box, type the correct account number, and then press Tab.

A screenshot of a form with two input fields. The first field is labeled 'DICOM Patient ID' and contains the text 'TesS1078'. The second field is labeled 'Account No./Alt \*' and contains the text '9828173'. Below these fields is a blue button labeled 'MANAGE ALTERNATE ACCOUNT NUM / IDENTIFIERS'.

4. In the Existing studies for patient list, select studies you want to move.

A screenshot of a window titled 'Existing studies for patient: TesS1078'. The window has a table with columns: 'accessionNo', 'Study Date', 'Study Description', and 'Referring Physician'. There are three buttons at the top right: 'SAVE', 'SAVE SELECTED', and 'CLEAR'. The table contains five rows of study data.

| accessionNo | Study Date              | Study Description                       | Referring Physician |
|-------------|-------------------------|-----------------------------------------|---------------------|
| 4177025     | 11/24/2023 7:11 AM EST  | US PELVIS COMPLETE                      |                     |
| 543         | 01/30/2024 7:00 PM EST  | DOP VELOCIMETRY FTL UMBILICAL ART       |                     |
| 795         | 02/09/2024 1:30 PM EST  | DOP ECHO FTL SPECTRAL DISPLAY COMPL     |                     |
| 1183        | 04/12/2024 12:30 PM EDT | 3D RNDR I&R CT MRI US/OTH X REQ POSTPCX | Test, Referring     |
| 1157        | 04/09/2024 9:15 PM EDT  | DOP VELOCIMETRY FTL UMBILICAL ART       |                     |

5. Select one of the following:  
 SAVE - Move all studies.  
 SAVE SELECTED - Move selected studies.

## Manage study forms in the patient chart

The patient chart includes a list of all study forms that were ever added to the patient's studies. From this list you can fill in and delete forms, or make them available on Patient Portal.



**Note:** One advantage of adding study form here in the patient chart is that the form becomes associated with all subsequent studies of that patient. This can be useful for forms such as for HIPAA that the patient only needs to sign once.

### Procedure

1. [Open](#) the patient's chart.
2. Select the STUDY FORMS tab.

|                          | Form Name                          | Accession No. | Study Description | Study Date | Modality | Signed By | Relation | Date Signed | Patient Portal           |
|--------------------------|------------------------------------|---------------|-------------------|------------|----------|-----------|----------|-------------|--------------------------|
| <input type="checkbox"/> | Consent Form                       |               |                   |            |          |           |          |             | <input type="checkbox"/> |
| <input type="checkbox"/> | Contrast Consent for Iodinated Dye |               |                   |            |          |           |          |             | <input type="checkbox"/> |
| <input type="checkbox"/> | CT Screening Form                  |               |                   |            |          |           |          |             | <input type="checkbox"/> |
| <input type="checkbox"/> | Echocardiogram Worksheet           |               |                   |            |          |           |          |             |                          |
| <input type="checkbox"/> | EKG Worksheet                      |               |                   |            |          |           |          |             |                          |
| <input type="checkbox"/> | Excuse to Return to Work           |               |                   |            |          |           |          |             |                          |

PRINT SELECTED

Add study form

3. On the Study Forms tab, you can do the following:
  - To print forms, select their checkboxes and then select PRINT SELECTED.
  - To add a form to the patient chart, select it in the Add study form dropdown list.
  - To fill in a form, select its edit  button.
  - To make a form available on Patient Portal, select its checkbox in the Patient Portal column.

See also:

Add a study form to a study

[Create a study form](#)

## Work with query and retrieve

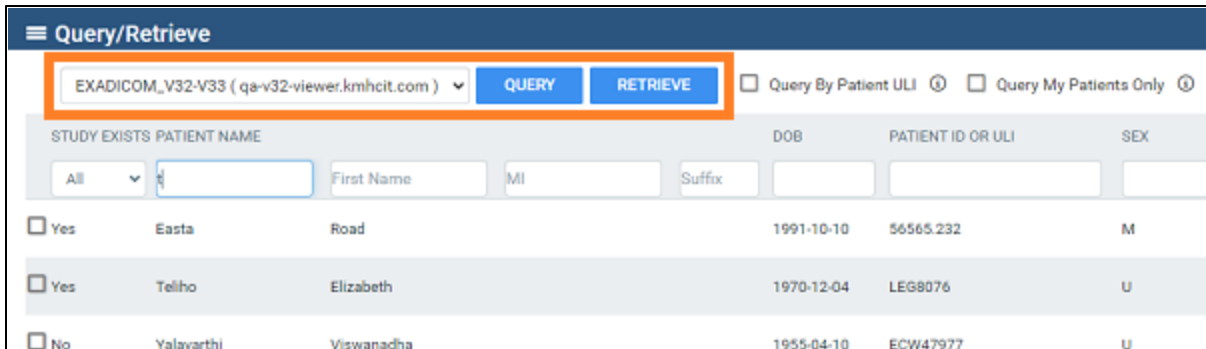
The Query/Retrieve feature enables you to look up patients and studies in other PACS servers that you configured as AEs. One common use of this feature is to quickly find specific priors. You can also Automatically retrieve priors from an external PACS to



Prerequisite: [Configure DICOM settings](#) for the server to query and for Symmetry PACS on the server. When configuring the AE to query/retrieve, set the AE type to both RETRIEVE and QUERY/RETRIEVE.

### 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.



| STUDY EXISTS                 | PATIENT NAME          | DOB        | PATIENT ID OR ULI | SEX |
|------------------------------|-----------------------|------------|-------------------|-----|
| <input type="checkbox"/> Yes | Easta Road            | 1991-10-10 | 56565.232         | M   |
| <input type="checkbox"/> Yes | Teliho Elizabeth      | 1970-12-04 | LEG8076           | U   |
| <input type="checkbox"/> No  | Yalavarthi Viswanadha | 1955-04-10 | ECW47977          | U   |

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. To retrieve all matching studies, select RETRIEVE. To retrieve some matching studies, select the studies, right-click, and then select Retrieve.

Result: The AE sends the selected studies to your server, and they appear in your worklist as they are received according to any receiver rules you configured. If your server already has the study, depending on settings, it either rejects the study or updates it with any newer data and images.

## 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](#)

[View your created reports](#)

[Send reports to providers](#)

### 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.



Prerequisite: Obtain user rights for the reports you want to create.

#### 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 a From Date and To Date, and then select other criteria to define the content of the report.
4. In the right pane under Report Types, select how you want to view the data.
5. 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 (not available for certain report types such as html)
  - 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. |

| Setting          | Description                                                                                          |
|------------------|------------------------------------------------------------------------------------------------------|
|                  | 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. |

- Optional: Under Report Password, type a password to require to open reports.
- 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.<br><a href="#">Install Exa Dictation</a><br><a href="#">Exa Dictation and transcription with Web Trans</a>                                                                                                                                                                |
| Client Service   | Enables Local Cache.<br><a href="#">Install and configure local cache</a><br><a href="#">Use local cache</a>                                                                                                                                                                                                          |
| Chrome Extension | Enables Chrome to work with multiple monitors.<br><a href="#">Add the Chrome extension</a><br><a href="#">Set up connected displays</a>                                                                                                                                                                               |
| Opal Tools       | Client-side application for importing, CD importing, and CD burning.<br><a href="#">Install OPAL tools</a><br><a href="#">Burn studies, series, or images to media</a><br><a href="#">Import DICOM images</a><br><a href="#">Import studies from CD</a><br><a href="#">Import studies to a specific AE (API mode)</a> |
| Opal Viewer      | Formerly "Opal Viewer," now called the "Exa Client Viewer." An alternative to the Symmetry PACS viewer that includes specialty annotations (such as for Chiropractic)<br><a href="#">Install Exa Client Viewer</a><br><a href="#">Open a study in a viewer</a>                                                        |
| Exa Trans        | The main client-side transcription application.<br><a href="#">Install Exa Trans</a><br><a href="#">Dictation and transcription with Exa Voice and Exa Trans</a>                                                                                                                                                      |
| Exa Scans        | Provides document scanning functionality.<br><a href="#">Install Exa Scans</a><br><a href="#">Attach (upload, scan) non-DICOM documents</a><br><a href="#">Attach (upload, scan) DICOM documents</a>                                                                                                                  |
| Exa Launch       | Enables integration with third-party applications.<br>Install Exa Launcher<br><a href="#">Configure integration with third-party apps</a>                                                                                                                                                                             |
| 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.<br><br>See also: Work with Exa Mobile                                                                                                                                                                              |

## 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 [Add or edit a patient's portal account](#).

## Work with Physician and Attorney Portals

For information on how physicians and attorneys can use Physician Portal and Attorney Portal (Exa PACS|RIS only), see the Physician Portal user's manual and Attorney Portal user's manual. In Symmetry PACS, staff enable physicians and attorneys to use portals by doing the following.

1. [Add a resource](#) of type Referring Provider or Attorney.
2. On the [LOGIN DETAILS](#) sub-tab of the resource, select a user who:
  - Is a referring provider or attorney, and;
  - Belongs to the Portal user's group.
3. Select LINK USER.

## Appendix

The appendix includes the following sections.

[User reference](#)

[Install and configure tools](#)

## Reference

### User reference

This section contains the following topics.

[Search syntax](#)

[Keyboard shortcuts and commands for Exa Trans](#)

[Merge fields](#)

[Description of reports](#)

[Measurement accuracy limits](#)

[Viewer tools and keyboard shortcuts](#)

[Details on Linked Reporting](#)

### 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<br>delete that<br>scratch that | -             |
| Next variable placeholder      | next variable                            | Alt+]         |
| Previous variable placeholder  | previous variable                        | Alt+[         |
| Capitalize previous word       | capitalize that<br>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     |
| 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 |

| Merge Field                 | Formal Name                    | Scope1             |
|-----------------------------|--------------------------------|--------------------|
| 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,        |
| 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 |

| Merge Field                  | Formal Name                     | Scope1             |
|------------------------------|---------------------------------|--------------------|
| 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 |
| 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 |

| Merge Field                  | Formal Name                                                 | Scope1             |
|------------------------------|-------------------------------------------------------------|--------------------|
| 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_PhyFullName_order        | Study-level referring physician for all studies in an order | SF                 |
| Ref_PhyHomePhone             | Referring Physician 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 |
| 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 |
| TechnologistFullName_order   | All primary technologists for each study in the order       | SF                 |

| Merge Field                      | Formal Name                                                          | Scope1                 |
|----------------------------------|----------------------------------------------------------------------|------------------------|
| 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     |
| AttorneyFullName_order           | Study-level attorney for all studies in an order                     | SF                     |
| 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 |
| AppointmentTypeCode_order        | Study-level appointment type code for all studies in an order        | SF                     |
| AppointmentTypeDescription       | Appointment Type Description                                         | SO, RT, ET, NT, SF, CF |
| AppointmentTypeDescription_order | Study-level appointment type description for all studies in an order | SF                     |
| ExpectedArrivalTime              | Expected Arrival Time                                                | SO, RT, ET, NT, SF, CF |
| AccessionNo                      | Accession Number                                                     | SO, RT, ET, NT, SF, CF |
| AccessionNo_order                | Study-level accession number for all studies in an order             | SF                     |
| 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 |
| ICDDescription                   | ICD Description                                                      | SO, RT, ET, NT, SF, CF |
| StudyICDCode                     | Study ICD Code                                                       | SO, RT, ET, NT, SF, CF |
| StudyICDCode_order               | Study-level study ICD code for all studies in an order               | SF                     |
| StudyICDDescription              | Study ICD Description                                                | SO, RT, ET, NT, SF, CF |

| Merge Field               | Formal Name                                                   | Scope1                 |
|---------------------------|---------------------------------------------------------------|------------------------|
| StudyICCDescription_order | Study-level study ICD description for all studies in an order | SF                     |
| Institution               | Institution                                                   | SO, RT, ET, NT, SF, CF |
| Modality                  | Modality                                                      | SO, RT, ET, NT, SF, CF |
| Modality_order            | Study-level modality for all studies in an order              | SF                     |
| ModalityRoom              | Modality Room                                                 | SO, RT, ET, NT, SF, CF |
| ModalityRoom_order        | Study-level modality room for all studies in an order         | SF                     |
| 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     |
| StudyDate_order           | Study-level study date for all studies in an order            | SF                     |
| Modality_order            | Study-level modality for all studies in an order              | SF                     |
| StudyDescription          | Study Description                                             | SO, ET, NT, SF, CF     |
| StudyDescription_order    | Study-level study description for all studies in an order     | SF                     |
| StudyFlag                 | Study Flag                                                    | SO, ET, NT, SF, CF     |
| StudyFlag_order           | Study-level study flag for all studies in an order            | SF                     |
| StudyReceivedDate         | Study Received Date                                           | SO, ET, NT, SF, CF     |
| StudyReceivedDate_order   | Study-level study received date for all studies in an order   | SF                     |
| TAT                       | TAT                                                           | SO, ET, NT, SF, CF     |

| Merge Field                | Formal Name                                                    | Scope1             |
|----------------------------|----------------------------------------------------------------|--------------------|
| TranscribingUser           | Transcribing User                                              | SO, ET, NT, SF, CF |
| VehicleName                | Vehicle Name                                                   | SO, ET, NT, SF, CF |
| studyUID                   | Study UID                                                      | SO, ET, NT, SF, CF |
| StudyFormsSignature        | 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 |
| ExamPrepInstructions_order | Study-level exam prep instructions for all studies in an order | SF                 |
| 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 |
| 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 |

| Merge Field           | Formal Name                                                | Scope1                     |
|-----------------------|------------------------------------------------------------|----------------------------|
| 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         |
| 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_PhyFullName_order | Study-level ordering physician for all studies in an order | SF                         |
| 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 |

| Merge Field        | Formal Name                      | Scope1                     |
|--------------------|----------------------------------|----------------------------|
| 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 |
| 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    |

| Category        | Right                      | Description                                                                                                                                                                |
|-----------------|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Billing         | CollectionsProcess         | Allows configuring the automatic claim collections process                                                                                                                 |
|                 | Delay Reasons              | Allows adding, editing, and deleting reasons for delayed payment                                                                                                           |
|                 | 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                                                                                                                                               |
|                 | 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  |                                                                                                                                                                            |

| Category              | Right                              | Description                                                                                                                                |
|-----------------------|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
|                       | Diagnosis Count                    |                                                                                                                                            |
|                       | Modality Summary                   |                                                                                                                                            |
|                       | Monthly Recap                      |                                                                                                                                            |
|                       | Patient Statement                  |                                                                                                                                            |
|                       | Payer Mix                          |                                                                                                                                            |
|                       | Payment                            |                                                                                                                                            |
|                       | 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                                                                               |

| Category | Right                                       | Description                                                                                                                                                                    |
|----------|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|          | Reset All Studies in Order                  | Adds the Reset All Studies in Order command to the shortcut menu in most tabs. Helpful when using the Dispatching Dashboard because it is order-based rather than study-based. |
| 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                                                                                                                   |
|          | 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                                                                                                                                  |
|          | Link Patient                                | Allows linking patients. Adds the Link Patient command to the worklist shortcut menu.                                                                                          |
|          | 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, and accessing the Technologist screen.                                                                                          |
|          | 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                                                                                                                                            |

| Category | Right                     | Description                                                                                                                                       |
|----------|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
|          | 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                                                                              |
|          | 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                                                                                                       |

| Category | Right                             | Description                                                                                                                                |
|----------|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
|          | Lab Orders                        | Allows adding, submitting, editing, and deleting laboratory tests and results records                                                      |
|          | Lab Orders (Read Only)            | Allows viewing laboratory tests and results records                                                                                        |
|          | 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                                                                                                        |

| Category    | Right                              | Description                                                         |
|-------------|------------------------------------|---------------------------------------------------------------------|
| Peer Review | Peer Review Allowance              | Allows managing automatic peer review assignments                   |
|             | Peer Review Manual Appointment     | Allows manually assigning peer reviews from the worklist            |
|             | Peer Review Operational            | Allows generating the peer review operational report                |
| 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          |                                                                     |
|             | Audit Trail                        |                                                                     |
| Schedule    | Add Study                          | Allows creating new studies, such as in the Edit Study screen.      |

| Category | Right                        | Description                                                                                                                          |
|----------|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
|          | 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                                                                |
|          | 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                                  |

| Category | Right                             | Description                                                                                                       |
|----------|-----------------------------------|-------------------------------------------------------------------------------------------------------------------|
|          | 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 multi-panel, and using the multi-panel 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                                                                            |
|          | 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                                                               |

| Category | Right                         | Description                                                                                                       |
|----------|-------------------------------|-------------------------------------------------------------------------------------------------------------------|
|          | 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                                                                          |
|          | Modality Room Notes           | Allows adding and editing modality room notes.                                                                    |
|          | 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  |
|          | 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                 |

| Category | Right                                 | Description                                                                                                                                      |
|----------|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
|          | 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                                                                                      |
|          | Assign Study Filters                  | Allows assigning of study filter to other users. Non-admins can have this right.                                                                 |
|          | 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                                                                             |
|          | Set Actions for Study Status          | Allows making changes to Study Status setup                                                                                                      |
|          | 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                                                                                                  |
|          | 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.                                                                                                    |

| Category       | Right                      | Description                                                                           |
|----------------|----------------------------|---------------------------------------------------------------------------------------|
|                | Portal Configurations      | Allows configuring links to appear on the patient, provider, and attorney portals.    |
|                | NDC Codes                  | Allows configuring NDCs.                                                              |
|                | LCM                        | Allows accessing the LCM (lifecycle management) screen                                |
| 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                   |
|                | Third Party Tool User Sync | Allows access to the Third Party Tools sub-tab in user configuration.                 |
| 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 configuring options in the Tools tab of Viewer Settings                        |
|                | 3D Advanced Visualization  | Exa PACS RIS only. Enables Exa Advanced Visualization.                                |

## 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.                                                   |
| Operations                   | Cancellation Reason                | Statistics on canceled studies with cancellation reason as a key filtering criterion.                |

| Category   | Report                             | Description                                                                                                                                              |
|------------|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
|            | 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 <sup>2</sup> | ±5%      |

| Measurement | Tools      | Unit | Accuracy |
|-------------|------------|------|----------|
| 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, EAV = Exa Advanced Visualization (Exa PACS|RIS only)

| 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 Advanced Visualization         | TB, EAV         | Switches between the standard viewer and the Exa Advanced Visualization viewer.                                                                                          |
|    | 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, EAV | 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. |
|  | 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.                                                                                                                                              |

| Tool                                                                                | Name                    | Availability    | Function                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------------------------------------------------------|-------------------------|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                     | Approve and Next        | ETS             | Approves the current study and opens the next study.                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|    | Arrow                   | TB, CM, KS, EAV | 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. <ul style="list-style-type: none"> <li>- BTO Jump to Next Finding</li> <li>- Toggle Breast Density</li> <li>- Toggle Breast Geometry</li> <li>- Toggle Calcification Clusters</li> <li>- Toggle Individual Calcification</li> <li>- Toggle Malc</li> <li>- Toggle Nipple</li> <li>- Toggle All Study</li> <li>- Toggle Current Image</li> </ul> |
|  | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|  | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|  | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| Tool                                                                                | Name                                    | Availability    | Function                                                                                                                            |
|-------------------------------------------------------------------------------------|-----------------------------------------|-----------------|-------------------------------------------------------------------------------------------------------------------------------------|
|    | 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, EAV | 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, EAV | Deletes all annotations.                                                                                                            |
|    | Delete Series Annotations               | TB, CM, KS, EAV | Deletes all annotations in the current series.                                                                                      |
|    | Delete All Study Annotations            | TB, CM, KS, EAV | 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.                                                  |
|  | DICOM Print                             | TB, CM, EAV     | Sends the image to a DICOM printer.                                                                                                 |
|  | DICOM Values<br>or<br>View DICOM Values | TB, CM, KS      | Displays a list of DICOM values associated with the current image.                                                                  |
|  | DM Settings                             | TB, CM          | Opens display management settings.                                                                                                  |
|                                                                                     | DM                                      | KS              | <u>DM navigation functions:</u><br>DM Next<br>DM Next Current<br>DM Next Group<br>DM Next Prior<br>DM Previous<br>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                      | CM              | Downloads the current series as an MP4 video, saved in a selectable frame rate.                                                     |

| Tool                                                                                | Name                                                | Availability    | Function                                                                                                                            |
|-------------------------------------------------------------------------------------|-----------------------------------------------------|-----------------|-------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                     | MP4                                                 |                 |                                                                                                                                     |
|    | Edit Annotations                                    | TB, CM, KS      | Turns Edit mode on/off. Edit mode allows editing of previously set annotations.                                                     |
|    | Ellipse                                             | TB, CM, KS, EAV | 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<br>or<br>Horizontal<br>Orthogonal<br>Angle | TB, CM, KS      | Draws a horizontal orthogonal angle.                                                                                                |
|  | Horizontal Line                                     | TB, CM, KS      | Draws a horizontal line.                                                                                                            |
|  | HU<br>or<br>Hounsfield<br>Units                     | TB, CM, KS      | Displays the pixel value in Hounsfield Units.                                                                                       |
|  | Invert                                              | TB, CM, KS, EAV | Inverts black/white values.                                                                                                         |
|  | 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<br>or                                     | TB, CM, KS      | Measurement comparison. Click a first and second point, then double-click a third point. Displays the distances between the points. |

| Tool                                                                                | Name                | Availability    | Function                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------|---------------------|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                     | Measure Compare     |                 |                                                                                                                                                                                                                                                                                                                                                                                    |
|    | Magnify             | TB, CM, KS      | The "magnifying glass tool," displays a movable zoomed area.                                                                                                                                                                                                                                                                                                                       |
|    | Measure             | TB, CM, KS, EAV | 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, EAV | Drags the image any direction.                                                                                                                                                                                                                                                                                                                                                     |
|    | Patient Documents   | TB, EAV         | 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, EAV         | 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, EAV         | Sends images to a non-DICOM printer.                                                                                                                                                                                                                                                                                                                                               |
|  | Prior Reports       | TB, EAV         | Opens reports. Turns blue when reports are available. Opens prior approved reports regardless of DICOM status (including non-imaging priors).                                                                                                                                                                                                                                      |
|  | 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, EAV | Draws a rectangle.                                                                                                                                                                                                                                                                                                                                                                 |
|  | Reset Frame         | TB, KS, EAV     | Undoes all unsaved changes to the image within the active viewing cell.<br><br>Exa Advanced Visualization: In 2D planes, resets the cross reference lines to the default positions, and slab thickness to the default state. In the 3D viewport, resets the view (rotation, Window/Level, etc.) to the default state, but leaves other selections in the dropdown lists unchanged. |
|  | Reset Linked Series | TB, KS          | Removes any linkages.                                                                                                                                                                                                                                                                                                                                                              |
|  | Reset Stack         | TB, CM, KS      | Restore images in a stack to their last-saved ordering.                                                                                                                                                                                                                                                                                                                            |

| Tool                                                                                | Name                       | Availability    | Function                                                                                                                 |
|-------------------------------------------------------------------------------------|----------------------------|-----------------|--------------------------------------------------------------------------------------------------------------------------|
|                                                                                     | 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, EAV | Draws an ellipse to specify an ROI.                                                                                      |
|    | Rotate (Right)             | TB, CM, KS      | Rotates the image 90 degrees clockwise.<br>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, EAV         | 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.                                                                                  |
|   | Set Center Point           | EAV             | Resets the center point of cross reference lines.                                                                        |
|                                                                                     | Skip                       | ETS             | In Exa Trans, skips the current study and moves to the next.                                                             |
|  | Span or Scroll/Span Images | TB, CM, KS, EAV | Switches between moving and spanning.                                                                                    |
|  | Set Key Image              | TB, CM, KS      | Sets the current image as a key image.                                                                                   |
|                                                                                     | Send Image/Annotations     | CM              | Opens a dialog for sending the current image to selected AEs.                                                            |
|  | Settings                   | TB, CM, EAV     | Displays the settings dialog.                                                                                            |
|  | Show Prior List            | TB, EAV         | 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.                                                                       |

| Tool                                                                                | Name                       | Availability    | Function                                                                                                               |
|-------------------------------------------------------------------------------------|----------------------------|-----------------|------------------------------------------------------------------------------------------------------------------------|
|    | 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, EAV         | 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, EAV     | 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.                                                                                            |
|  | Transcription              | TB, EAV         | Opens an independent dictation and transcription window.                                                               |
|  | 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, EAV | Adjusts the window/level.                                                                                              |
|  | Zoom                       | TB, CM, KS, EAV | Zooms the image in/out.                                                                                                |

## Details on Linked Reporting

### Statutes 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 Symmetry PACS

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, Symmetry PACS 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, Canceled, 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, point to TOOLS, and then 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.

Monitors on System   

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, point to TOOLS, and then 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, point to TOOLS, and then 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, point to TOOLS, and then 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, point to TOOLS, and then 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, point to TOOLS, and then 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. To use local cache, see [Use local cache](#). To install and configure local cache:

### 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, point to TOOLS, and then 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.                                                                         |
| 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 after which to perform a prefetch.         |

| Target                    | Shortcut                                                                                                                  |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------|
| 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.<br>(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         | How many studies to download at a time.                                                                                   |
| Cache Disk Usage          | Move the slider to set the maximum percentage of hard drive to use for prefetching and local rendering.                   |
| Oncall Interval           | Type the number of minutes to elapse before checking for new studies to prefetch (to refresh the oncall worklist filter). |
| Prefetch Priors           | Select to include priors when prefetching.                                                                                |
| Number of Priors          | Select the number of priors to prefetch.                                                                                  |
| Enable Skinline Detection | Select to make Skinline Detection available when viewing prefetched studies.                                              |
| Cache Filter Page Size    | Type the maximum number of studies to cache from those that are found based on worklist filters.                          |

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.

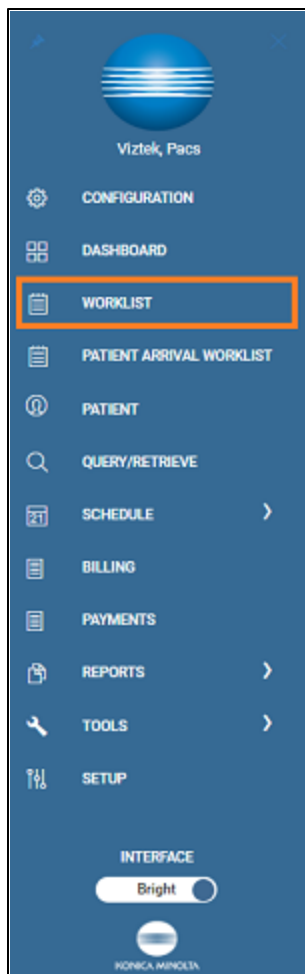
## Location and contents of screens

### Burger menu

The burger menu contains the following options.

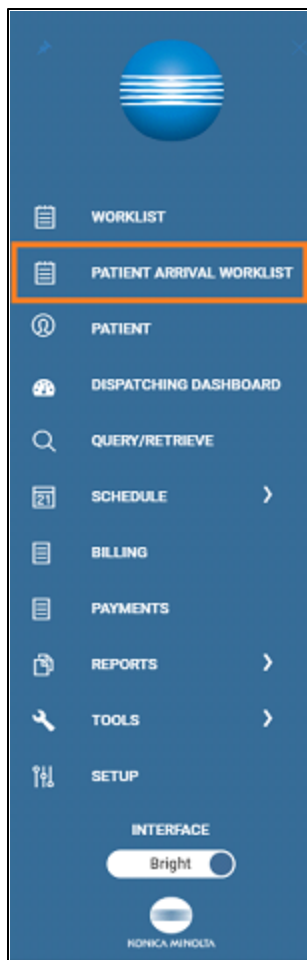
Burger > Worklist

[Return to previously viewed page: Alt + Left Arrow]



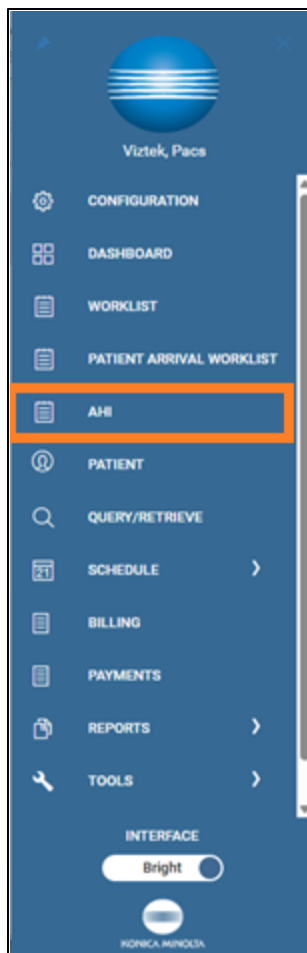
Burger > PATIENT ARRIVAL WORKLIST

[Return to previously viewed page: Alt + Left Arrow]



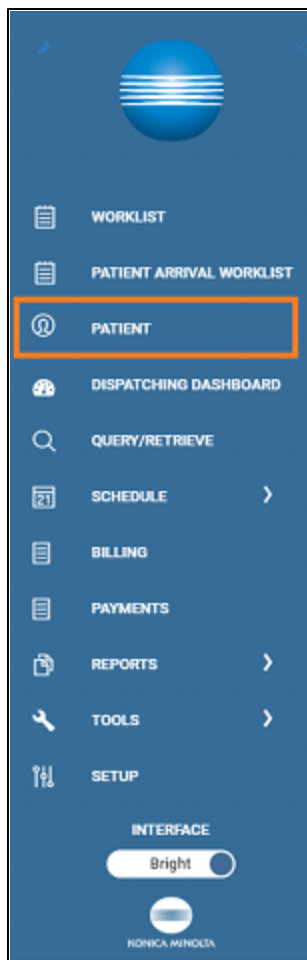
Burger > AHI

[Return to previously viewed page: Alt + Left Arrow]



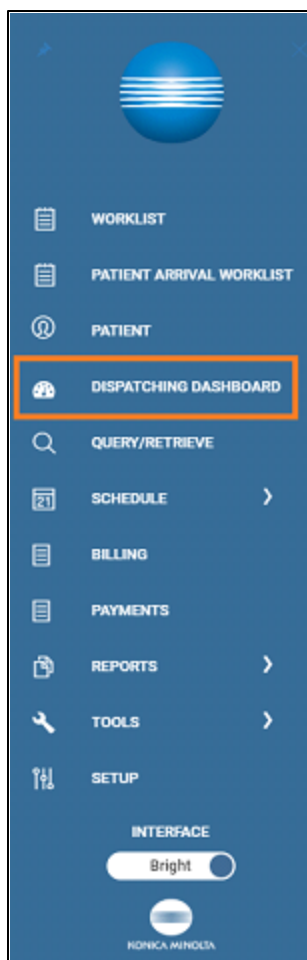
Burger > PATIENT

[Return to previously viewed page: Alt + Left Arrow]



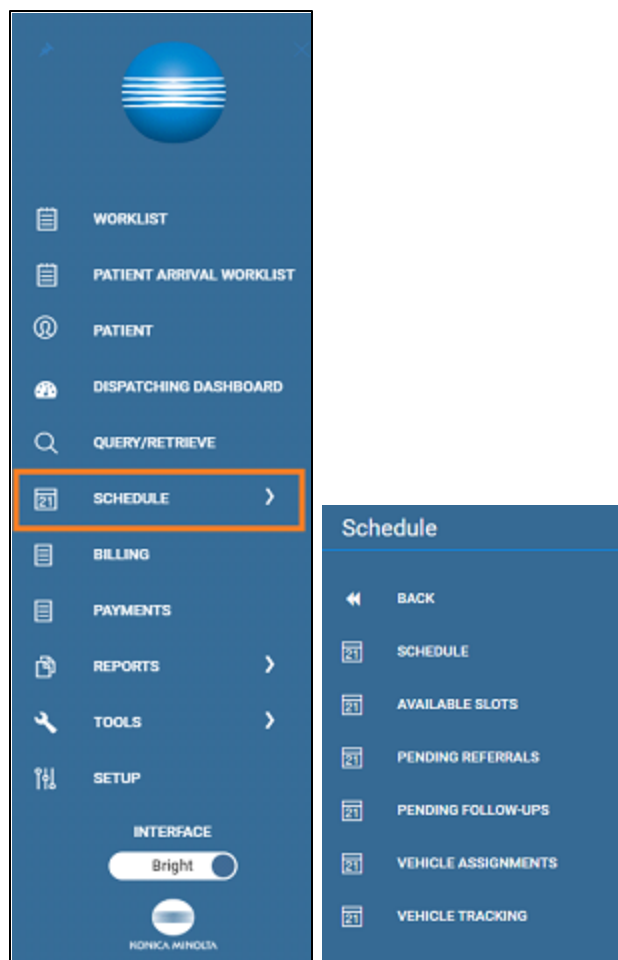
Burger > DISPATCHING DASHBOARD

[Return to previously viewed page: Alt + Left Arrow]



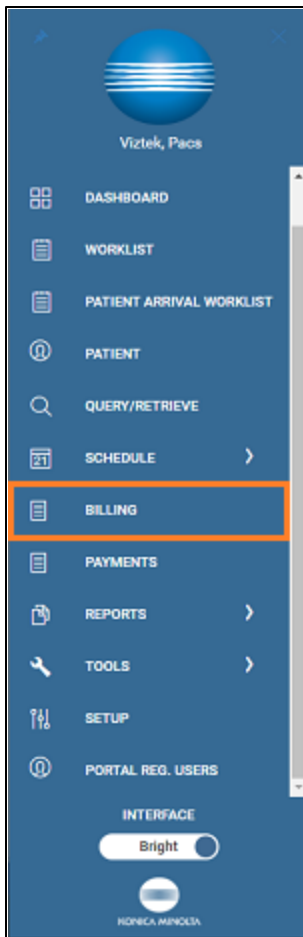
Burger > SCHEDULE

[Return to previously viewed page: Alt + Left Arrow]



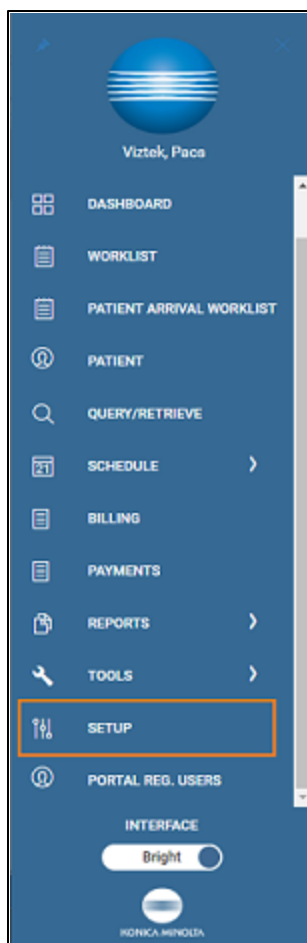
Burger > BILLING

[Return to previously viewed page: Alt + Left Arrow]



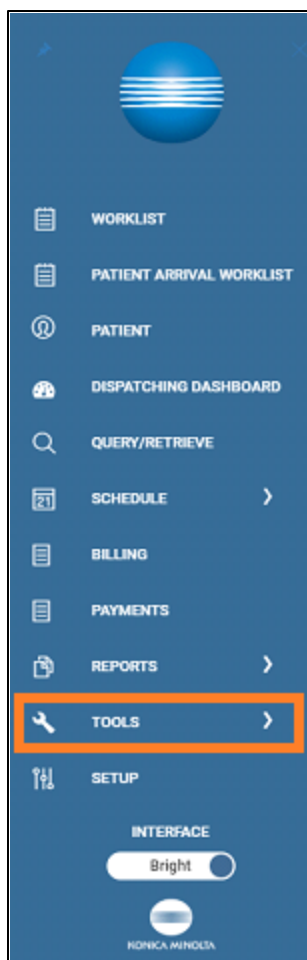
Burger > SETUP

[Return to previously viewed page: Alt + Left Arrow]



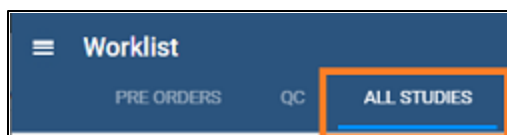
Burger > TOOLS

[Return to previously viewed page: Alt + Left Arrow]

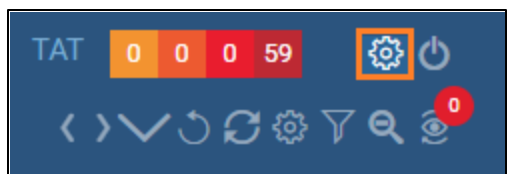


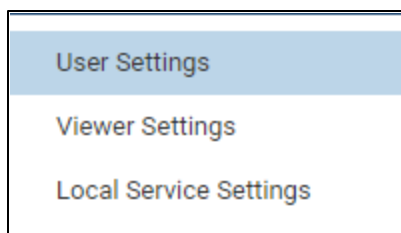
## Worklist

Worklist > ALL STUDIES

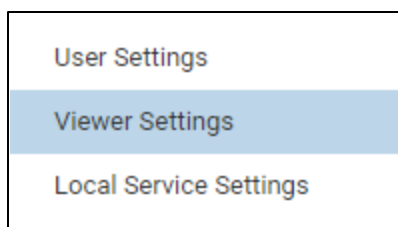
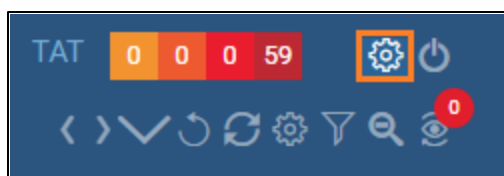


Worklist > Settings > User Settings

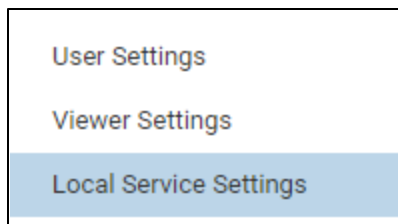
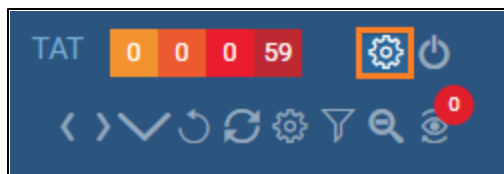




Worklist > Settings > Viewer Settings



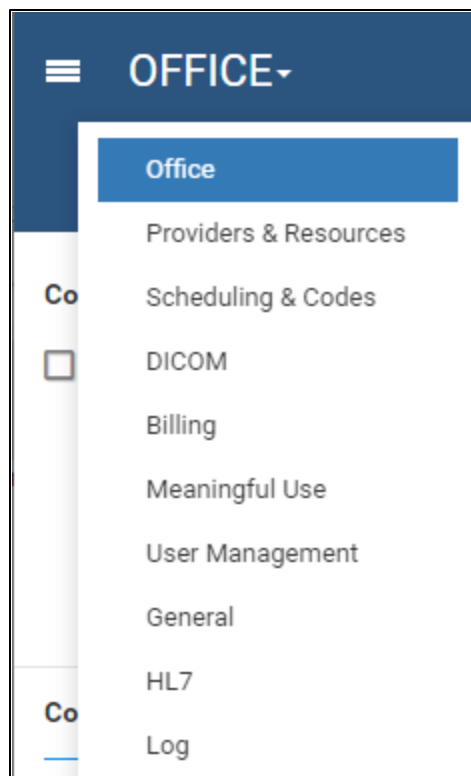
Worklist > Settings > Local Service Settings



## Office menu

The setup area (or "office") menu contains the following options.

OFFICE > Office



## Billing

### Billing > Studies

**STUDIES** Census **Studies** Claims Payments EOB Report Setup Log Log Off

ALL STUDIES CONTAINS HEALTH IS AETNA HEALTH PLAN IS NOT AET

NEW CLAIM BATCH CLAIM

| ACCOUNT NO. | PATIENT              | STUDY DATE              | INSURANCE PROVIDERS       |
|-------------|----------------------|-------------------------|---------------------------|
|             |                      | 2023-04-20 - 2023-05-19 |                           |
| TesA1092    | Test, Aubrey         | 2023-05-19 11:00 AM PDT |                           |
| FirF1094    | First1905, First1905 | 2023-05-19 9:30 AM EDT  | AARP MEDICARE COMPLETE    |
| SSSr1093    | SS, Sri              | 2023-05-19 10:00 PM EDT | AARP HEALTH ADVANTAGE HEA |

### Billing > Claims

**CLAIMS** Studies **Claims** Payments EOB Report Setup Log Log Off

ALL CLAIMS FOLLOW-UP QUEUE

VALIDATE ELECTRONIC CLAIM (EDI)

| STUDY DATE              | CLAIM DATE | CLAIM NUMBER | PATIENT NAME  | CLEARINGHOUSE             | BILLING  |
|-------------------------|------------|--------------|---------------|---------------------------|----------|
| 12/15/2022 - 03/14/2023 |            |              |               | All                       | All      |
| 02/01/2023              | 02/01/2023 | 9            | Test, Richard | Worker Compensation Board | Direct B |
| 02/01/2023              | 02/01/2023 | 8            | Test, Jill    |                           | Patient  |
| 01/17/2023              | 01/17/2023 | 7            | Test, Judy    |                           | Patient  |

### Billing > Payments

**PAYMENTS** Census Studies Claims **Payments** EOB Report Setup Log Log Off

Payment Status: ALL SELECTED (4)

APPLY TO PAYMENT SMALL BALANCE ADJUSTMENT

Payment Total: \$2,058.00 Total Payment Applied: \$1,518.00 Adjustment Total: \$10.00

ADD REFRESH EXPORT GENERATE PDF

| PAYMENT# | REFERRER | PAYMENT DATE | ACCOUNTING | PAYER TYPE | PAYER NAME       | PATIENT MRN | PAYMENT AMT | PAYMENT ADJ | BALANCE | ADJUSTMENT | NOTES | POSTED BY    | PAYMENT M | CHECK/CARD | FACILITY     |
|----------|----------|--------------|------------|------------|------------------|-------------|-------------|-------------|---------|------------|-------|--------------|-----------|------------|--------------|
| 35       |          | 2023-05-23   | 2023-05-23 | Insurance  | AETNA HEALTH PLI |             | \$992.00    | \$992.00    | \$0.00  | \$8.00     |       | Pa, Srinika  | Cash      |            | My Company   |
| 34       |          | 2023-05-23   | 2023-05-23 | Insurance  | AETNA HEALTH PLI |             | \$98.00     | \$98.00     | \$0.00  | \$2.00     |       | Pa, Srinika  | Cash      |            | My Company   |
| 33       |          | 2023-05-18   | 2023-05-18 | Patient    | Test, Tom        | Test1007    | \$50.00     | \$0.00      | \$50.00 | \$0.00     |       | Rog, Namilla | Cash      |            | Namilla Test |

### Billing > Setup



Billing > Report

Studies Claims Payments EOB Report Setup Log Log Off

VALIDATE

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

Referring Provider Summary

## Screens in the Edit Study screen

Edit Study > PATIENT INFORMATION

The screenshot shows the 'Patient Information' form within the 'Edit Study' screen. The top header indicates 'Patient, New (Acc#:PatN1120), 01/01/1977, M, 46Y'. The left sidebar contains a menu with options like SUMMARY, EXAM INFORMATION, PATIENT INFORMATION (highlighted), CHARGES/PAYMENTS, PATIENT PAYMENT HISTORY, INSURANCE PROFILE, DOCUMENTS, APPROVED REPORTS, TRANSCRIPTION, OTHER PHYSICIANS, NOTES, ADDITIONAL INFORMATION, PATIENT ALERTS, ALLERGIES, PROBLEMS, STUDIES, CUSTOM FORMS, STUDY FORMS, FOLLOW UP, and REFERRALS. The main form area is titled 'Patient Information [less]' and includes tabs for PORTAL ACCOUNT, SCAN LICENSE, INQUIRY, and CHECK IN CODE. The form fields are organized into two columns. The left column includes: Market (NONE SELECTED), Facilities (MY COMPANY), DICOM Patient ID, Account No./Alt (PatN1120), Name (New MI), Patient (Patient), Suffix (star), Alias (First Name, Last Name), DOB (01/01/1977), Sex (M), Marital Status (Select), Smoking Status (Select), and Racial/Ethnic (checkboxes for American Indian or Alaska Native, etc.). The right column includes: License No./State, Exp. Date (MM/DD), Emp. Status (Select), Employer Name, Emp. Address, City/State/ZIP, Phone/Fax, and Notes. A 'MANAGE ALTERNATE ACCOUNT NUM / IDENTIFIERS' button is located between the Account No./Alt and Name fields.

## Viewer Settings

Viewer > Settings



Viewer > Settings > General

## Viewer Settings

GENERAL

INTERFACE

MODALITY

MAMMOGRAPHY

OVERLAYS

TOOLS

EXTERNAL TOOLS

### Display Settings

Monitors on System   

| Monitor                                      | Current                          | Prior                            | Full Screen                         | Orders | Type                          |
|----------------------------------------------|----------------------------------|----------------------------------|-------------------------------------|--------|-------------------------------|
| <input type="checkbox"/> DISPLAY1            | <input type="radio"/>            | <input type="radio"/>            | <input type="checkbox"/>            | None ▼ | <input type="text" value=""/> |
| <input checked="" type="checkbox"/> DISPLAY2 | <input checked="" type="radio"/> | <input type="radio"/>            | <input checked="" type="checkbox"/> | None ▼ | <input type="text" value=""/> |
| <input checked="" type="checkbox"/> DISPLAY3 | <input type="radio"/>            | <input checked="" type="radio"/> | <input checked="" type="checkbox"/> | None ▼ | <input type="text" value=""/> |

### Autosave Options

- ☐ Autosave Image Properties on Close
- ☐ Autosave Image Annotations on Close
- ☐ Auto Mark Read Study on Close
- ☐ Auto Upload Dictation on Close
- ☐ Autosave Viewer Settings on Close
- ☐ Auto Open Next Study
- ☐ Auto Send Annotated Images on Close

Viewer &gt; Settings &gt; Interface

**SETTINGS**

GENERAL

INTERFACE

MODALITY

MAMMOGRAPHY

OVERLAYS

TOOLS

EXTERNAL TOOLS

Toolbar

Toolbar Button Scale  %

Thumbnail Bar Scale  %

Magnifying Glass Size  200 Px. Factor

W/L Acceleration  100

Span Sensitivity  Auto Dflt Low High

☐ Span as Scroll

Thumbnail Column/Rows

Annotation

☒ Show Annotation

☒ One-Click Annotations

☒ Show One-Click Annotations Button

☒ Annotation Edit Mode

☐ Use Dot Cursor

☒ Edit Annotations after Creating

☐ Allow Drag Create

☒ Confirm Annotation Delete

☒ Persistent Annotation Tool

Show Measurements In  mm

Colors

SA

Viewer &gt; Settings &gt; Tools

**SETTINGS**

GENERAL

INTERFACE

MODALITY

MAMMOGRAPHY

OVERLAYS

TOOLS

EXTERNAL TOOLS

Toolbar

All

>>MAIN

>>TOP

>>BOTTOM

>>LEFT

>>CONTEXTMENU

>>KYBD. SHORTCUTS

Tools

|                          | Tools                 |
|--------------------------|-----------------------|
| <input type="checkbox"/> | 3D Angle              |
| <input type="checkbox"/> | 3D Measure            |
| <input type="checkbox"/> | 3D Point              |
| <input type="checkbox"/> | 3D ROI                |
| <input type="checkbox"/> | 3D Ray                |
| <input type="checkbox"/> | 3D Cursor             |
| <input type="checkbox"/> | Angular Rotation      |
| <input type="checkbox"/> | Actual Image Size     |
| <input type="checkbox"/> | Create Teaching Study |
| <input type="checkbox"/> | Angle Marker          |

SAVE